

Case – The local municipality is looking for financial assistance from local service clubs to construct a playground for a local park.

Scenario 1 – The City is asking local services clubs to contribute \$1,000 towards this project. The clubs that contribute will get plaque recognition on the playground equipment.

- Questions to be answered:
  - o Does it qualify for a District grant? – Meets Mission Statement of Foundation.
  - o Is it a donation?
  - o If it doesn't qualify, what can be done to make it qualify?

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Notes:

- Unrestricted donations do not qualify for a district grant
- To make it qualify, could pay for funds directly o supplier
- Application must demonstrate some control over funds advanced (making it restricted)
- Application must demonstrate Rotarian involvement

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Scenario 2 – The City asks the local Rotary club to buy and install playground equipment for a local park. The club will get recognition with a plaque on the playground equipment.

- Questions to be answered:
  - o Does it qualify for a District Grant?
  - o Who is paying for the plaque? (signage)
  - o Is the City a benefiting organization or a co-operating organization?
  - o What is considered significant Rotarian involvement?
  - o Budget – What are we're looking for
  - o When can the project start?
  - o When does it have to be completed?
  - o Who signs application?
  - o When is the application due?
  - o When is the final report due?

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Notes:

- This scenario does qualify for a district grant – Rotary club has control over funds and has Rotarian involvement
- Signage over \$500 can not be funded by a District grant
- The District grant is a matching grant up to \$2,000 US funds
- In this scenario the City is a “Benefiting Organization”
- With the application submission, a letter from the benefiting organization demonstrating need is required.
- The club needs to obtain quotes and document accordingly in the application
- Project cannot start until the District receives permission that the District Spending Plan has been approved.

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Scenario 3 – Same as #2 but the City requires that it's Parks and Rec department be used for procurement of materials.

- Questions to be answered:
  - o How does this change the application from scenario 2
  - o What additional items are required?

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Notes:

- The City in this scenario is a Co-operating Organization
- Because the City is responsible for acquiring the materials, competing quotes are not required
- In addition to the required letters, the Co-operating Organization needs to sign the application on Page 7
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Scenario 4 – The project is an international project. A club in Jamaica asks a club from our District to partner with the costs of putting a playground in a local school.

- Questions to be answered:
  - o How does this change the application?
  - o Donation?
  - o Other considerations?

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Notes:

- How does this Scenario Change the application? – Sections 3 and 8 of the application need to be completed.
- Your club needs to demonstrate a control of funds to make sure that the funds advanced are not considered a donation
- When getting involved in an International Project, or any project involving a partnering organization, make sure to do your due diligence and know who you are dealing with.

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Scenario 5 – The Final Report – In your application you requested \$2,000US from the District. The project was completed by November 15, 2015 and you came under budget, it only cost \$3,580

- Questions to be answered:
  - o When does it have to be completed and submitted?
  - o What information is needed?
  - o How much are is the club entitled to?
  - o Can the club spend the shortfall?
  - o Other considerations?

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Notes:

- The final report has to be completed and submitted within two months of the project's completion or May 1<sup>st</sup> whichever is earlier
- See page 2 of the final report form to see the required supporting financial information.
- The details of the Final Report must agree with the details in the approved grant application
- This is a matching grant, the club is entitled to up to a 1:1 match of what it requested in the budget in the approved application.
- If there is a shortfall in spending the club can spend the shortfall on items contained in the approved application
- Timely reporting is important. If the District does not get these final reports in on a timely basis, it holds up the District's final report to the Rotary Foundation. This in turn delays when clubs can proceed with their projects in the following Rotary year.