



Rotary District 5020 District Simplified Grant Application

Please print or type all information and **use additional sheets of paper if necessary.** (Note DSG funds cannot be applied for to reimburse a club for projects completed or in progress.)

1. _____
Sponsoring Rotary Club (Initiator of the grant request) Club mailing address

2. Describe the project, its location, and its objectives (must be humanitarian in nature; subsequent changes in scope, purpose or substantial purchases must receive prior approval):

Estimated start date

Estimated Completion Date (Maximum date is 1 May each yr)

3. Describe how the project will benefit the community and/or improve the lives of the intended recipients

4. Describe non-financial participation by Rotarians in the project. (i.e., Rotarian Activities)

5. Project Contacts – Two Rotarians must be listed who will provide oversight and management of the project funds.

A. _____
Name (Primary contact) Rotary Position or title Mailing address

Telephone No. _____ Fax No. _____ Email: _____

B. _____
Name (Secondary contact) Rotary Position or title Mailing address

Telephone No. _____ Fax No. _____ Email: _____

6. Cooperating Organizations – If the project involves a cooperating organization, please provide the name of the organization and attach a letter of participation from that organization or a Memorandum of Understanding between Rotary and the other organization that specifically states its responsibilities and how Rotarians will interact with the organization in the project. By signing this application, the Rotarian sponsors endorse the organization as reputable, registered with the project country (if applicable), and acting within the laws of the project country (if applicable).

Name of Cooperating Organization Cooperating Organization Contact person & phone no.

7. How will the general public know this is a Rotary-sponsored project? Provide details of planned publicity and display of Rotary emblem if appropriate.

8. Budget – Please include a complete, detailed, and itemized budget for the entire project. *Supporting documentation utilized for the development of this budget may be requested.*

Sources of funds:

- a. Sponsoring Rotary Club's Commitment: \$_____ (seed \$)
- b. Requested DSG grant funds: \$_____ (normal grant is \$ for \$ match of club's seed \$ up to max of \$2500)
- c. Funds from other sources: \$_____

Total project Cost Estimate(info only):

Intended Uses of DSG Funds (8b. above):

Material to be purchased (obtain invoices for all individual items>\$500): _____
(Attach a list of expected purchases)

Shipping /Transportation Costs: _____

Specialized labor costs [invoice required] (e.g. licensed electrician) _____

Other: _____

Other: _____

Other: _____

Total DSG dollars to be spent on this project (must equal 8.b request above):

9. Authorization – The sponsoring Rotary Club is responsible to the District for the conduct of the project and accountability of District DSG funds. Rotary Clubs do not need to account to the district for monies provided by the club or other sources. The signatures on the application confirm that the sponsors understand and accept the responsibility for the stewardship of DSG funds and affirm that all information in this application is true and accurate to the best of their knowledge. The president's signature affirms that this project has been approved by the Club's Board of Directors as a club activity but will not be started until receipt of approval of the DSG.

Primary Contact Signature

Secondary Contact Signature

Club President's name(printed)

Club President's signature

date

email address

10. Approval – This grant request is: approved / disapproved / returned for additional input:

DGC initial & date

District Foundation Chairperson(DFC)

Date

11. Funds delivery: – Upon approval of the District Foundation Chairperson the project may begin and the sponsoring Rotary Club may commit DSG funds up to the amount authorized. The District will forward the actual DSG funds to the club on a cost reimbursable basis up to the amount of the grant, upon receipt of the final report of completion of the project. Final reports are due to the district within one month of completion of the project and in all cases no later than 1 June of each Rotary year.

Reminder of Criteria for using District Simplified Grants:

Rotary sponsored District Simplified Grant projects should:

- a) provide a benefit to more than one person, and be for a humanitarian purpose, i.e., to improve the health, safety, or well-being of the citizens of a community, and/or provide a service to persons in need.
- b) be publicly identified as a Rotary Project.
- c) be of a short-term nature with the expectation that they will be completed by 1 May of each Rotary year. Sponsors must provide a final report within one month of a project's completion and in no event later than 1 June of each Rotary year.
- d) have two contacts in the club who are responsible to oversee and complete the project and final report.

Rotary sponsored District Simplified Grant projects MUST :

- a) not directly benefit a Rotarian, an employee of a club, district or other Rotary entity or of Rotary International, or a spouse, lineal descendant, a spouse of a lineal descendant, or an ancestor of any living Rotarian or Rotary employee.
- b) not fund existing projects or activities primarily sponsored by another organization or fund operational expenses of another organization.
- c) not be used for international travel, salaries or Other administrative overhead costs,
- d) not involve liability on the part of District 5020 or Rotary International or its Foundation except to provide the amount of the grant,
- e) not be used to reimburse applicants for projects already initiated or completed,
- f) not be used to purchase land, buildings or to construct/renovate substantial buildings. Funds must be used in compliance with the Foundation's policies on construction and renovation. Unacceptable construction/ renovation projects include: Buildings, containers, schools, hospitals, clinics, storage facilities, or factories.
- g) not be used for upgrading/renovation of existing facilities. Unacceptable refurbishing or upgrading projects include: Electrification, windows/doors, walls/roof, heating/air conditioning, utility repairs, demolition, etc.) Renovation is changing/upgrading the existing structure.
- h) not be used to fund the on-going projects of a Rotary club or district. (This does not preclude the replication of successful projects that will benefit additional communities or extended to new groups of people.)

Project sponsors must agree to work within the Rotary Foundation Trustee established Stewardship Guidelines and utilize the Financial Guidelines and Regulations for Humanitarian Grant Projects. Good stewardship is mandatory. Accountability (i.e. receipts, documentation of expenditures) of Rotary funds/District funds is required. Clubs are not required to account for club monies, but are encouraged to use the same accounting standard as that required to account for TRF and District funds. Progress/Final reports require accounting for only DSG funds (the match.)

Footnote: With all the “Must nots” it is still acceptable to purchase equipment and some furnishings for buildings so long as the grant monies spent on equipment are separate from monies spent by other sources on construction/renovation. TRF may require construction/renovation to be complete and documented before they will release the grant money for equipment and furnishings. For example, you can't pay a contractor to renovate a building and install new equipment as part of the contract, but if other resources are used to build/renovate you can use grant money to buy the equipment and deliver it to the building for installation after the building is completed (furnishings).

District 5020 Simplified Grants are approved on a cost reimbursable basis. Once the grant is approved by the District Foundation Chairperson the club can commit/spend up to the approved amount on the project. When the final report is submitted with documented completion (with invoices), the District will send a check to the club on a \$ for \$ match of actual club seed money expended up to the amount of the approved grant.

It is essential that final reports be submitted on time. Penalties by The Rotary Foundation for missing final reports are severe and may impact all clubs in the district. See General Instructions for further info.