



Roger and Sharon

ROTARY INTERNATIONAL DISTRICT 5910



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Governor 2008-2009

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DISTRICT QUALIFICATION MEMORANDUM OF UNDERSTANDING

1. District Qualification
2. District Officer Responsibilities
3. Club Qualification
4. Financial Management Plan
5. Annual Financial Assessment
6. Bank Account Requirements
7. Report on Use of Grant Funds
8. Document Retention
9. Method for Reporting and Resolving Misuse of Grant Funds

1. District Qualification

To participate in district, global, and packaged grants, a district shall complete an online qualification process, agreeing to implement the financial and stewardship requirements in this memorandum of understanding (MOU). By successfully completing these requirements, a district becomes qualified, and eligible to participate in Rotary Foundation (TRF) grants.

- A. A district is responsible for the use of funds for district-sponsored grants, regardless of who controls the funds.
- B. A district is responsible for a club-sponsored grant if the sponsoring club has been terminated or is otherwise unable to take responsibility for the grant.
- C. To maintain qualified status, a district must comply with this MOU and all applicable TRF policies.
- D. Qualification may be suspended or revoked for any of the following:
 1. Misuse or mismanagement of grant funds, or failure to appropriately address allegations involving, but not limited to, fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes
 2. Refusal to qualify member clubs without sufficient cause
- E. A district must cooperate with any financial, grant, or operational audits.

2. District Officer Responsibilities

The district governor, district governor-elect, and district Rotary Foundation committee chair shall hold primary responsibility for club and district qualification, in addition to overseeing the proper implementation of TRF grants.

District officer responsibilities include:

1. Implementing, managing, and maintaining the district and club qualification process
2. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices
3. Abiding by, following, enforcing, disseminating, and educating Rotarians on the terms and conditions for district, global, and packaged grants

4. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest

3. Club Qualification

Districts are responsible for qualifying their member clubs. To be qualified, the club shall agree to the club MOU and send at least one club member to the district Rotary Foundation grant management seminar.

- A. A club must be qualified in order to receive TRF global and packaged grants. Club qualification is not required for a club to receive district grant funds.
- B. A district may establish additional requirements for club qualification, in order to take into consideration relevant local laws or district-specific circumstances. Additional requirements must be attainable by all clubs in the district.
- C. A district may allot district grant funds to nonqualified clubs in its district or other districts; however, the district remains responsible for the use of those grant funds. Nonqualified clubs that fail to abide by all applicable TRF policies, including the terms and conditions for TRF district grants, may jeopardize the district's qualification status.

4. Financial Management Plan

Districts must have a written financial management plan to provide consistent administration of grant funds.

The financial management plan must include procedures to

1. Maintain a standard set of accounts, which includes a complete record of all receipts and disbursements of grant funds
2. Disburse grant funds, as appropriate
3. Maintain segregation of duties for handling funds
4. Establish an inventory system for equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities
5. Ensure that all grant activities, including the conversion of funds, comply with local law

5. Annual Financial Assessment

The financial management plan and its implementation shall be assessed annually. A financial assessment is an evaluation of financial controls and compliance. The district shall choose either an independent firm or the district Rotary Foundation audit committee to conduct the annual financial assessment.

- A. A financial assessment is substantially smaller in scope than an audit or review, and includes:
 1. Confirmation that the district adhered to its financial management plan
 2. An examination of expenditures for district grants, district-sponsored global grants, and district-sponsored packaged grant that includes:
 - a. Reconciling a selection of disbursements against their supporting documentation
 - b. Reviewing the full listing of expenditures to ensure that funds were expended in a manner consistent with the terms and conditions of the grant award
 - c. Confirming that a competitive bidding process was conducted for all significant expenditures
 - d. Reviewing the process to disburse funds to ensure that proper controls have been maintained
 3. A determination that all financial transactions and project activities related to the grant were conducted at least at the level of standard business practices:

- a. Confirmation of adherence to TRF document retention requirements
 - b. Other procedures that the district Rotary Foundation audit committee or an independent firm deems necessary
- 4. A report of the findings from the annual financial assessment, which must be given to clubs in the district within three months of the end of each Rotary year
- B. If the district has the district Rotary Foundation audit committee conduct the assessment, the committee may not include individuals directly involved with TRF grants and must meet the requirements found in the RI Bylaws, including:
 - a. Have at least three members
 - b. Have at least one member who is a past governor or a person with audit experience

6. Bank Account Requirements

In order to receive grant funds, the district shall have a dedicated, district-controlled bank account that is used solely for receiving and disbursing TRF grant funds.

- A. The district bank account must
 - 1. Have a minimum of two Rotarian signatories from the district for disbursements
 - 2. Be a low- or noninterest-bearing account
- B. Any interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.
- C. A separate account should be opened for each district-sponsored grant, and the name of the account should clearly identify its use for grant funds.
- D. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.
- E. Bank statements must be available to support receipt and use of TRF grant funds.
- F. The district must maintain a written plan for transferring custody of the bank accounts in the event of a change in leadership.

7. Report on Use of Grant Funds

Grant reporting is a key aspect of grant management and stewardship. Districts shall set up a grant reporting process.

- A. Districts must report to their clubs on the use of all district designated funds (DDF) to their member clubs by
 - 1. Providing a report annually at a district meeting to which all clubs are invited or eligible to attend that includes a breakdown of expenditures for each project that received funding and the names of districts, clubs, and individuals who received grant funds
 - 2. Including financial information on such grants in the governor's final monthly communication
- B. Districts must adhere to all TRF grant reporting requirements.

8. Document Retention

Districts shall establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification and TRF grants. Retaining these documents supports transparency in grant management and assists in the preparation for audits or financial assessments.

- A. Documents that must be maintained include, but are not limited to
 - 1. Bank information, including copies of past statements

2. Club qualification documents, including:
 - a. Signed club MOUs
 - b. Club attendance records for grant management seminar
 3. District grant, district-sponsored global grant, and district-sponsored packaged grant information, including:
 - a. Information collected from clubs and entities receiving district grant funds
 - b. Receipts and invoices for all purchases made with grant funds
 4. Documented plans and procedures, including:
 - a. Financial management plan
 - b. Procedure for storing documents and archives
 - c. Succession plan for bank account signatories and retention of information and documentation
 - d. System to track reports of misuse and/or mismanagement of grant funds
 5. Annual report from the financial assessment and use of grant funds
- B. District records must be accessible and available to Rotarians in the district.
- C. Documents must be maintained for a minimum of five years, or longer if required by local law.

9. Method for Reporting and Resolving Misuse of Grant Funds

The qualification process requires districts to track, investigate, and resolve reports of misuse or mismanagement of grant funds. By creating a plan before any allegations of misuse are made, the district can apply procedures consistently and foster an environment that does not tolerate misuse of funds.

- A. Districts must create a system to facilitate and track reports of misuse and/or mismanagement of grant funds.
- B. Districts must promptly investigate reports of misuse or mismanagement of grant funds.
- C. Districts must report any potential or substantiated misuse or mismanagement of grant funds to TRF.



CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING

THE ROTARY FOUNDATION

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds

1. Club Qualification

To participate in Rotary Foundation global and packaged grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF) and to send at least one club member to the district's grant management seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in Rotary Foundation district grants. By completing these requirements, the club becomes qualified and eligible to participate in the TRF grant program.

- A. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.
- B. To maintain qualified status, the club must comply with this MOU, any additional district requirements, and all applicable TRF policies.
- C. The club is responsible for the use of funds for club-sponsored grants, regardless of who controls the funds.
- D. Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes.
- E. The club must cooperate with any financial, grant, or operational audits.

2. Club Officer Responsibilities

The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants.

Club officer responsibilities include:

- A. Appointing at least one club member to implement, manage, and maintain club qualification
- B. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices
- C. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest

3. Financial Management Plan

The club must have a written financial management plan to provide consistent administration of grant funds.

The financial management plan must include procedures to

- A. Maintain a standard set of accounts, which includes a complete record of all receipts and disbursements of grant funds
- B. Disburse grant funds, as appropriate
- C. Maintain segregation of duties for handling funds
- D. Establish an inventory system for equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities
- E. Ensure that all grant activities, including the conversion of funds, comply with local law

4. Bank Account Requirements

In order to receive grant funds, the club must have a dedicated bank account that is used solely for receiving and disbursing TRF grant funds.

- A. The club bank account must
 - 1. Have a minimum of two Rotarian signatories from the club for disbursements
 - 2. Be a low- or noninterest-bearing account
- B. Any interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.
- C. A separate account should be opened for each club-sponsored grant, and the name of the account should clearly identify its use for grant funds.
- D. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.
- E. Bank statements must be available to support receipt and use of TRF grant funds.
- F. The club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.

5. Report on Use of Grant Funds

The club must adhere to all TRF reporting requirements. Grant reporting is a key aspect of grant management and stewardship, as it informs TRF of the grant's progress and how funds are spent.

6. Document Retention

The club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification and TRF grants. Retaining these documents supports transparency in grant management and assists in the preparation for audits or financial assessments.

- A. Documents that must be maintained include, but are not limited to:
 - 1. Bank information, including copies of past statements
 - 2. Club qualification documents including a copy of the signed club MOU
 - 3. Documented plans and procedures, including:
 - a. Financial management plan
 - b. Procedure for storing documents and archives
 - c. Succession plan for bank account signatories and retention of information and documentation
 - 4. Information related to grants, including receipts and invoices for all purchases
- B. Club records must be accessible and available to Rotarians in the club and at the request of the district.
- C. Documents must be maintained for a minimum of five years, or longer if required by local law.

7. Reporting Misuse of Grant Funds

The club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the club that does not tolerate the misuse of grant funds.

Authorization and Agreement

This memorandum of understanding is an agreement between the club and the district and acknowledges that the club will undertake measures to ensure the proper implementation of grant activities and proper management of Foundation grant funds. By authorizing this document, the club agrees to comply with all of the conditions and requirements of the MOU.

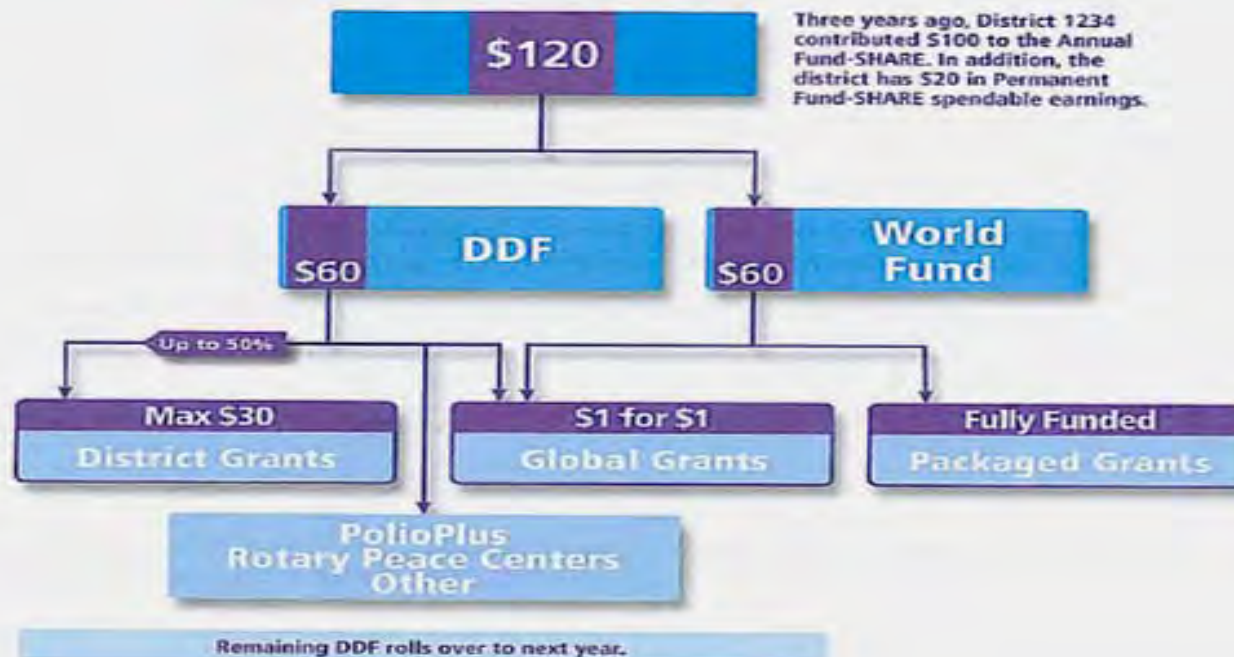
On behalf of the Rotary Club of _____, the undersigned agree to comply with all of the conditions and requirements of the MOU for Rotary year _____ and will notify Rotary International District _____ of any changes or revisions to club policies and procedures related to these requirements.

Club President	
Term	
Name	
Signature	
Date	

Club President-elect	
Term	
Name	
Signature	
Date	

District Designated Fund Policy

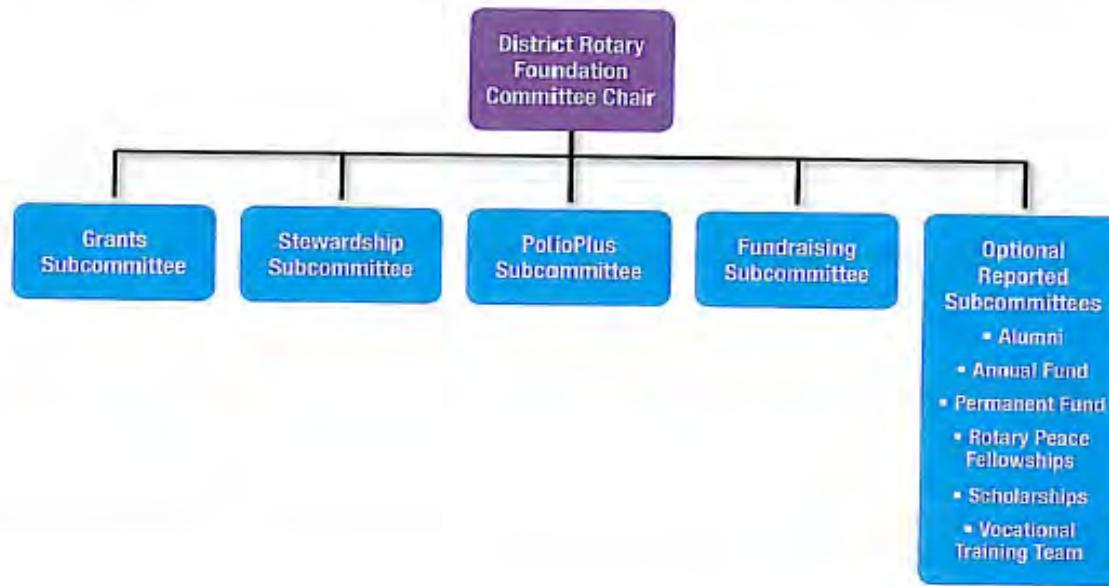
SHARE System



- How will you determine which activities will receive district grant and global grant funding?
- How have you communicated your policy to clubs?

District Structure

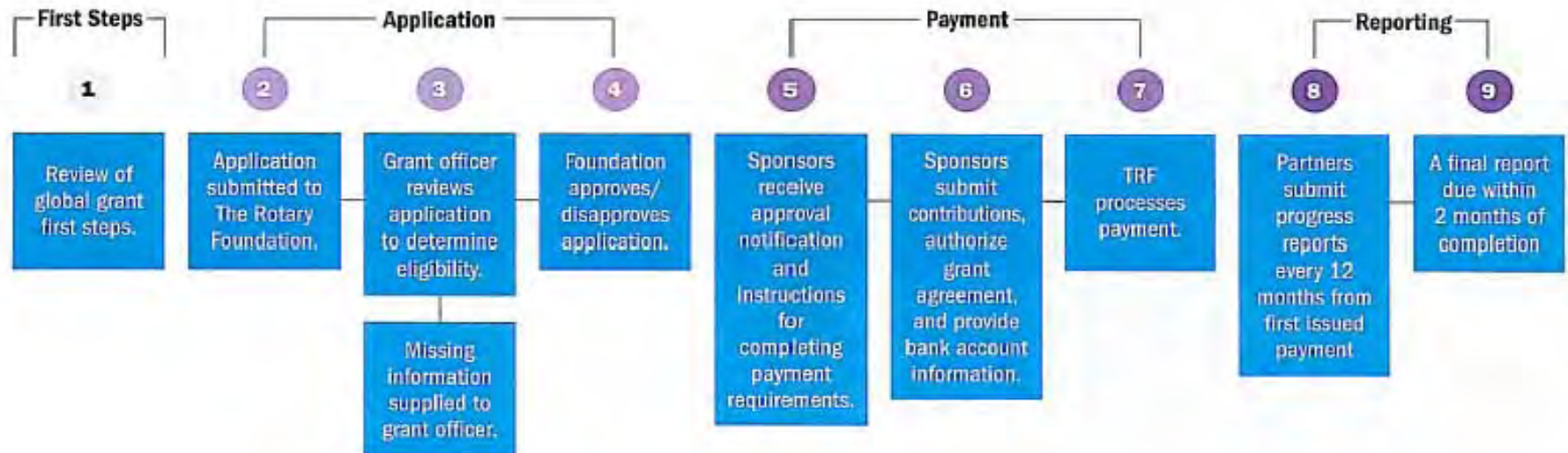
Take two minutes to edit the district structure below to match the one created in your district. Go around the table, giving each governor-elect/district Rotary Foundation committee chair team two minutes to discuss its district Foundation committee structure and any challenges or successes experienced in implementing it.



- What aspects of your new district structure are working well?

- What challenges are you facing with the new district structure?

Global Grants Business Cycle



Only qualified clubs and districts can submit applications.

Areas of Focus

Statements of Purpose and Goals



With respect to the areas of focus policy statements, TRF notes that

1. The goals of Future Vision are to increase efficiency in grant processing and ensure quality of funded projects;
2. The content of each policy statement is intended to represent eligible and ineligible activities;
3. Eligible activities reflect those that Rotary clubs and districts have most often implemented;
4. Project planning is a bottom-up and host club/district-driven process;
5. All grant requests must comply with the policy statements related to each area of focus.

Peace and Conflict Prevention/Resolution

Rotary supports the training, education, and practice of peace and conflict prevention and resolution.

I. Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to promote the practice of peace and conflict prevention/resolution by:

1. Training leaders, including potential youth leaders, to prevent and mediate conflict;
2. Supporting peace-building in communities and regions affected by conflict;
3. Supporting studies for career-minded professionals related to peace and conflict prevention/resolution.

II. Parameters for Eligibility

TRF considers activities targeting the following to be within the scope of the peace and conflict prevention/resolution area of focus:

1. Community activities targeting non-Rotarian participants, including conferences,

trainings, and camps, in support of nonviolence, peace-building, and human rights;

2. Facilitated conflict resolution workshops related to topics addressing community needs such as policy development, business activities across conflict lines, educational reform, and peace journalism;
3. Supporting initiatives addressing psychological effects of conflict;
4. Educating youth on preventive measures to avoid conflict;
5. Training programs or campaigns to address negative social dynamics in a community, including but not limited to anti-gang efforts and those to overcome radical differences;
6. Communication and arbitration among parties previously engaged in direct conflict;
7. Vocational training teams supporting the above activities;
8. Scholarships for graduate-level study in programs related to peace and conflict prevention/resolution.

TRF considers activities targeting the following to be outside the scope of the peace and conflict prevention/resolution area of focus and as such are **not eligible** for global grant funding:

1. Peace conferences targeting Rotarian participants;
2. Enrollment at a Rotary Peace Center partner university in the same, or similar, academic program as those pursued by Rotary Peace Fellows.

III. Elements of Successful Humanitarian Projects and Vocational Training Teams

Global grants are:

1. Sustainable – communities are able to address their peace and conflict needs after the Rotary club/district has completed its work;
2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;
3. Community driven – designed by the host community based upon the needs they have identified;
4. Aligned with an area of focus – as defined in the policy documents.

IV. Elements of Successful Scholarships

Global grants support graduate-level scholarships for career-minded professionals.

TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of peace and conflict prevention/resolution;

2. Academic program alignment with peace and conflict prevention/resolution.
 - a. Examples of preferred academic programs include conflict prevention/resolution, peace and justice studies, and international relations or law with a specialization in peace and conflict;
 - b. Programs that will be considered favorably include those that focus directly on peace and conflict issues;
 - c. Programs that will **not** be considered favorably include those that relate to general international relations or law.
3. The applicant's career plans as they relate to peace and conflict prevention/resolution.

Disease Prevention and Treatment

Rotary supports activities and training that reduce the cause and effect of disease.

I. Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to prevent disease and promote health by:

1. Improving the capacity of local health care professionals;
2. Promoting disease prevention programs, with the goal of limiting the spread of communicable diseases and reducing the incidences of and complications from non-communicable diseases;
3. Enhancing the health infrastructure of local communities;
4. Educating and mobilizing communities to help prevent the spread of major diseases;
5. Preventing physical disability resulting from disease or injury;
6. Supporting studies for career-minded professionals related to disease prevention and treatment.

II. Parameters for Eligibility

TRF considers activities targeting the following to be within the scope of the disease prevention and treatment area of focus:

A. Prevention and Control of Communicable Diseases

1. Testing with counseling and referrals/admission to treatment;
2. Education on preventing transmission of disease and supplies that may assist with these prevention efforts;
3. Providing mobile technology equipment and vehicles to monitor and treat patients;

4. Equipment supported by the local health infrastructure that includes appropriate operational and maintenance plans;
 5. Provision of prevention programs, such as vaccinations, male circumcision or pre-exposure prophylaxis;
 6. Providing technical platform and training in its operation for the tracking and monitoring of disease diagnosis and treatment;
 7. Treatment of communicable diseases that includes a component to prevent disease, improve training of health service professionals, or provide public health education to improve the long-term health of a community.
- B. Mosquito-Borne Illnesses and Illnesses Transmitted by Other Vectors (Organisms That Transmit Pathogens)
1. Providing bednets and preventative medications;
 2. Providing supplies that help with safe storage of standing water and training on interrupting the lifecycle of mosquitoes;
 3. Developing drainage systems to prevent and control diseases;
 4. Providing for removal of vectors other than mosquitoes.
- C. Prevention and Control of Noncommunicable Diseases
1. Providing materials and training to prevent physical disability due to disease or injury;
 2. Community education, intervention programs, and early screening programs with the goal of reducing the incidence and prevalence of chronic diseases;
 3. Providing mobile technology equipment and vehicles to monitor and treat patients;
 4. Equipment supported by the local health infrastructure that includes appropriate operational and maintenance plans;
 5. Lifesaving surgeries and surgeries to address congenital problems provided they are supported by the local health infrastructure and include appropriate follow-up care;
 6. Treatment of noncommunicable diseases that includes a component to prevent disease, improve training of health service professionals, or provide public health education to improve the long-term health of a community.
- D. Other Activities
1. Scholarships for graduate-level study in programs related to disease prevention and treatment;
 2. Vocational training teams that focus on educational components related to activities outlined above.

TRF considers activities targeting the following to be outside the scope of the disease prevention and treatment area of focus and as such are not eligible for global grant

funding:

1. Projects that consist exclusively of an equipment purchase, unless supported by the local health infrastructure that includes appropriate operational and maintenance plans;
2. Medical missions/surgical team trips that do not provide educational outreach programs or significant capacity building in the project country.

III. Elements of Successful Humanitarian Projects and Vocational Training Teams

Global grants are:

1. Sustainable – communities are able to address their disease prevention and treatment needs after the Rotary club/district has completed its work;
2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;
3. Community driven – designed by the host community based upon the needs they have identified;
4. Aligned with an area of focus – as defined in the policy documents.

IV. Elements of Successful Scholarships

Global grants support graduate-level scholarships for career-minded professionals.

TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of disease prevention and treatment;
2. Academic program alignment with disease prevention and treatment. Examples of academic programs include public health, advanced degrees in nursing and medicine;
3. The applicant's career plans as they relate to disease prevention and treatment.

Water and Sanitation

Rotary supports activities and training to provide access to safe drinking water and basic sanitation.

I. Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to ensure that people have sustainable access to water and sanitation by:

1. Providing equitable community access to safe water, improved sanitation and

- hygiene;
- 2. Strengthening the ability of communities to develop, fund and maintain sustainable water and sanitation systems;
- 3. Supporting programs that enhance communities' awareness of the benefits of safe water, sanitation and hygiene;
- 4. Supporting studies for career-minded professionals related to water and sanitation.

II. Parameters for Eligibility

TRF considers activities targeting the following to be within the scope of the water and sanitation area of focus:

- 1. Access to safe drinking water (i.e. supply and quality);
- 2. Access to improved sanitation;
- 3. Improved hygiene;
- 4. Community development and management of systems for sustainability;
- 5. Watershed management and food security plans that depend on adequate water supply;
- 6. Water for production (i.e. crops, livestock, etc.);
- 7. Vocational training teams supporting the above activities;
- 8. Scholarships for graduate-level study in programs related to water and sanitation.

III. Elements of Successful Humanitarian Projects and Vocational Training Teams

Global grants are:

- 1. Sustainable – communities are able to address their water, sanitation and hygiene needs after the Rotary club/district has completed its work;
- 2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;
- 3. Community driven – designed by the host community based upon the needs they have identified,
- 4. Aligned with an area of focus – as defined in the policy documents.

IV. Elements of Successful Scholarships

Global grants support graduate-level scholarships for career-minded professionals.

TRF considers the following when evaluating global grant scholarship applications:

- 1. The applicant's previous work experience in the field of water and sanitation;
- 2. Academic program alignment with water and sanitation. Examples of academic

- programs include water science/engineering, water management, environmental science, epidemiology, and parasitology;
3. The applicant's career plans as they relate to water and sanitation.

Maternal and Child Health

Rotary supports activities and training to improve maternal health and reduce child mortality for children under five.

I. Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to improve the health of mothers and their children by

1. Reducing the mortality and morbidity rate for children under the age of five;
2. Reducing the maternal mortality and morbidity rate;
3. Improving access to essential medical services, trained community health leaders and health care providers for mothers and their children;
4. Supporting studies for career-minded professionals related to maternal and child health.

II. Parameters for Eligibility

TRF considers activities targeting the following to be within the scope of the maternal and child health area of focus:

1. Prenatal care for pregnant women;
2. Labor and delivery services for pregnant women;
3. Providing medical equipment to underserved clinics and hospital maternity wards, when provided in conjunction with prenatal care educational activities;
4. Training and/or "train the trainer" initiatives for maternal and child health professionals and leaders (i.e. doctors, nurses, community health workers, and midwives);
5. Training and/or "train the trainer" initiatives for skilled birth attendants;
6. Prenatal and child care educational activities for parents and families;
7. Initiatives that build upon and/or improve capacity of existing community initiatives and/or local women's groups pertaining to maternal and child health;
8. Education about and access to birth control, family planning and/or disease prevention and reduction initiatives, inclusive of HIV/AIDS and human papillomavirus¹ (HPV);

¹ HPV is the necessary, but not sufficient, cause of cancer of the cervix as well as other cancers that affect both men and women. In developing countries, cervical cancer is one of the most common cancers in women with high mortality rates, due to lack of screening which is widely available in developed countries and no/limited availability and access to HPV vaccine – a proven preventive vaccine.

9. Education and training on sexual health, particularly for adolescent girls;
10. Vocational training teams that focus on educational components related to activities outlined above, whether intended for the public, traditional health leaders or health professionals in the recipient community;
11. Scholarships for graduate-level study in programs related to maternal and child health;
12. Relevant immunization for children under five;
13. Relevant immunizations for women and adolescent girls;
14. Interventions to combat pneumonia, diarrhea, malaria, and/or measles for mothers and children under five;
15. Interventions to reduce the impact of sexually transmitted disease in women, e.g., HIV/AIDS, cancer of the cervix, gonorrhea and syphilis, etc.
16. Preventing mother-to-child transmission of HIV;
17. Promotion of breastfeeding and other interventions to fight malnutrition;
18. Surgical repair of fistula;
19. Surgeries/procedures to correct cleft palates;
20. Lifesaving surgeries and surgeries to address congenital problems provided they are supported by the local health infrastructure and include appropriate follow-up care.

TRF considers activities targeting the following to be outside the scope of the maternal and child health area of focus and as such are not eligible for global grant funding:

1. Medical missions/surgical team trips that do not provide significant capacity building in the project country.

III. Elements of Successful Humanitarian Projects and Vocational Training Teams

Global grants are:

1. Sustainable – communities are able to address their maternal and child health needs after the Rotary club/district has completed its work;
2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;
3. Community driven – designed by the host community based upon the needs they have identified;
4. Aligned with an area of focus – as defined in the policy documents.

IV. Elements of Successful Scholarships

Global grants support graduate-level scholarships for career-minded professionals. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of maternal and child health;
2. Academic program alignment with maternal and child health. Examples of academic programs include epidemiology, nutrition, global health, public health, and health promotion and degrees in nursing and medicine;
3. The applicant's career plans as they relate to maternal and child health.

Basic Education and Literacy

Rotary supports activities and training to improve education for all children and literacy for children and adults.

I. Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to ensure that all people have sustainable access to basic education and literacy by:

1. Involving the community to support programs that strengthen the capacity of communities to provide basic education and literacy to all;
2. Increasing adult literacy in communities;
3. Working to reduce gender disparity in education;
4. Supporting studies for career-minded professionals related to basic education and literacy.

II. Parameters for Eligibility

TRF considers activities targeting the following to be within the scope of the basic education and literacy area of focus:

1. Access to quality basic primary and secondary education;
2. Educating adults in literacy;
3. Providing training in teaching literacy, curriculum development and school administration;
4. Strengthening educational experience through improved materials and facilities;
5. Community management of education systems;
6. Vocational training teams supporting the above activities;
7. Scholarships for graduate-level study in programs related to basic education and literacy.

TRF considers activities targeting the following to be outside the scope of the basic education and literacy area of focus and as such are not eligible for global grant funding:

1. Projects that consist exclusively of equipment purchases;
2. Projects that provide tuition or school supplies without the means for the community to provide these in the future.

III. Elements of Successful Humanitarian Projects and Vocational Training Teams

Global grants are:

1. Sustainable – communities are able to address their basic education and literacy needs after the Rotary club/district has completed its work;
2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;
3. Community driven – designed by the host community based upon the needs they have identified;
4. Aligned with an area of focus – as defined in the policy documents.

IV. Elements of Successful Scholarships

Global grants support graduate-level scholarships for career-minded professionals. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of basic education and literacy;
2. Academic program alignment with basic education and literacy. Examples of academic programs include education, literacy, curriculum development, special education, and school administration;
3. The applicant's future career plans as they relate to basic education and literacy.

Economic and Community Development

Rotary supports investments in people to create measurable and enduring economic improvement in their lives and communities.

I. Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to invest in people by creating sustainable, measurable and long term economic improvements in their communities and livelihoods by

1. Building the capacity of entrepreneurs, community leaders, local organizations, and community networks to support economic development in impoverished communities;
2. Developing opportunities for productive work;

3. Reducing poverty in underserved communities;
4. Supporting studies for career-minded professionals related to economic and community development.

II. Parameters for Eligibility

TRF considers activities targeting the following to be within the scope of the economic and community development area of focus:

1. Access to financial services for the poor, which may include but are not limited to microcredit, savings, or insurance;
2. Training related to economic and community development including but not limited to entrepreneurship, community leadership, vocational, and financial literacy;
3. Small business/cooperative/social enterprise development and income-generating activities for the poor, including but not limited to the organization of village-wide businesses that provide employment;
4. Agricultural development for subsistence and small farmers, including but not limited to the facilitation of access to markets;
5. Community-led and coordinated adopt-a-village or comprehensive community development activities;
6. Vocational training teams supporting the above activities;
7. Scholarships for graduate-level study in programs related to grass-roots economic development and programs specifically designated in community development.

TRF considers activities targeting the following to be outside the scope of the economic and community development area of focus and as such are not eligible for global grant funding:

1. Community infrastructure projects, if they are not part of a larger income generating activity;
2. Community beautification projects;
3. Construction or rehabilitation of community centers.

III. Elements of Successful Humanitarian Projects and Vocational Training Teams

Global grants are:

1. Sustainable – communities are able to address their economic and community development needs after the Rotary club/district has completed its work;
2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;

3. Community driven – global grants are designed by the host community based upon the needs they have identified;
4. Aligned with an area of focus – as defined in the policy documents.

IV. Elements of Successful Scholarships

Global grants support graduate-level scholarships for career-minded professionals. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of economic and community development. Applicants are expected to demonstrate how their work contributed to the economic well-being of poor or underserved communities.
2. Academic program alignment with economic and community development:
 - a. Examples of preferred academic programs include social science degrees with a specific focus on economic and community development, and business degrees tailored for social business or microcredit;
 - b. Programs that will be favorably considered include those that
 - i. Focus on grass-roots economic development strategies;
 - ii. Focus on addressing economic issues of poor and underserved communities;
 - iii. Support social business development, such as a tailored track within a Masters of Business Administration program;
 - iv. Include "community development" in the name of the program or tailored track;
 - c. Programs that will not be favorably considered include those that
 - i. Focus on purely theoretical or macro-level economics;
 - ii. Support general private business development, such as a masters of business administration;
 - iii. Connect in a general way to the field of community development but do not include "community development" in the name of the program or tailored track.
3. The applicant's career plans as they relate to economic and community development.
 - a. Careers that will be considered favorably include those that
 - i. Focus on improving the economic well-being of poor and underserved communities;
 - ii. Are in a non-profit or social enterprise environment;
 - b. Careers that will not be considered favorably include those that focus on general business activities in a private or corporate environment.

Global or District Grant Activity

The sample project ideas will be read from the stage. Determine whether they fit in one of the areas of focus using the decision trees on the following pages, the policy statements on pages 96-107, and if they fit within an area of focus, use the chart on page 123 to determine what makes them sustainable.

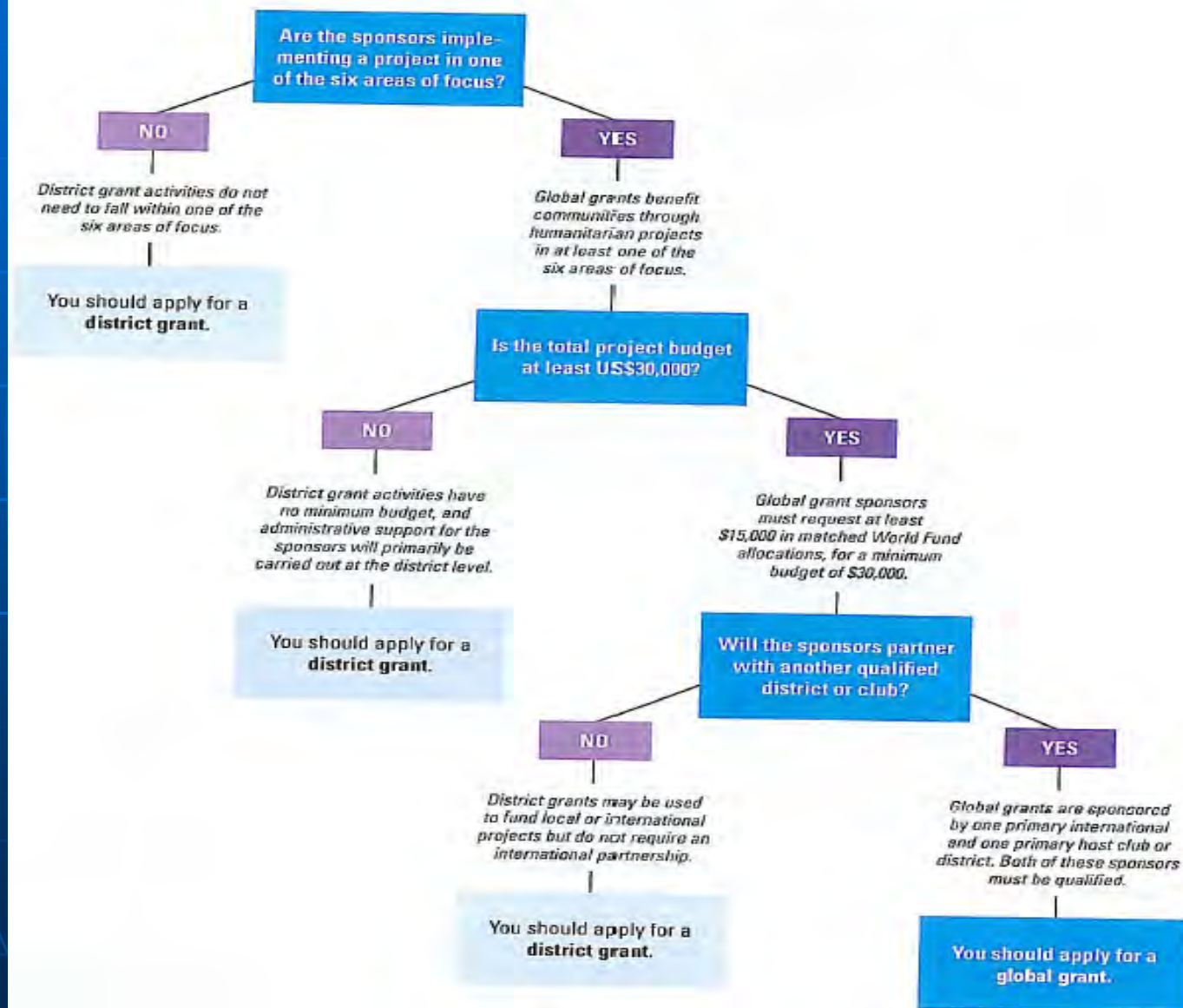
Sample Project	Global Grant		District Grant
	Area of Focus	Sustainable	
1. To provide clean water to children in 297 rural schools and seven orphanages in Belize by supplying water containers and filters, providing education about waterborne diseases, and training in the operation and maintenance of filters			
2. To support a village in Uganda by sending a vocational training team from the United States to provide training in economic development, education, and health, in addition to sending a vocational training team from Uganda to the United States to receive training in water management and irrigation			
3. To provide a water purification system in Pakistan			
4. To provide training and equipment for health care workers and parents in the holistic treatment of patients in the extended-care pediatric wards of hospitals in South Africa			

Sample Project	Global Grant		District Grant
	Area of Focus	Sustainable	
5. To fund a scholar to study psychology in Spain for one year			
6. To fund a scholarship for a master of arts degree in Spanish, with research, academic, and professional interests focused on Latino immigration and the obstacles to literacy and basic education in a Latin American country			
7. To fund a vocational training team of special-needs teachers, physical therapists, and an occupational therapist from England to Thika, Kenya, to train teachers at three schools			
8. To provide athletic equipment to students from financially disadvantaged families to encourage them to participate in after-school sports and enrichment			
9. To provide bed nets, doctor consultations, and medications to facilitate the prevention, diagnosis, and treatment of malaria in Mali, along with education on disease transmission and how to use the bed nets			

Sample Project	Global Grant		District Grant
	Area of Focus	Sustainable	
10. To raise community awareness in Benin about child protection by training educators and by creating a comic book on children's rights			
11. To provide orthopedic surgery equipment to hospitals in India			
12. To provide solar panels, a well, a generator, tanks, farm equipment, seeds, furniture, and a projector to help set up an agricultural school in Uganda that will train 50 to 60 students per year			
13. To provide books and dictionaries to low-income schools			
14. To fund a culture exchange focused on music history that includes a group of musicians visiting conservatories in Venezuela			
15. To provide water, toilet facilities, and basic hygiene training to five schools in Indonesia			

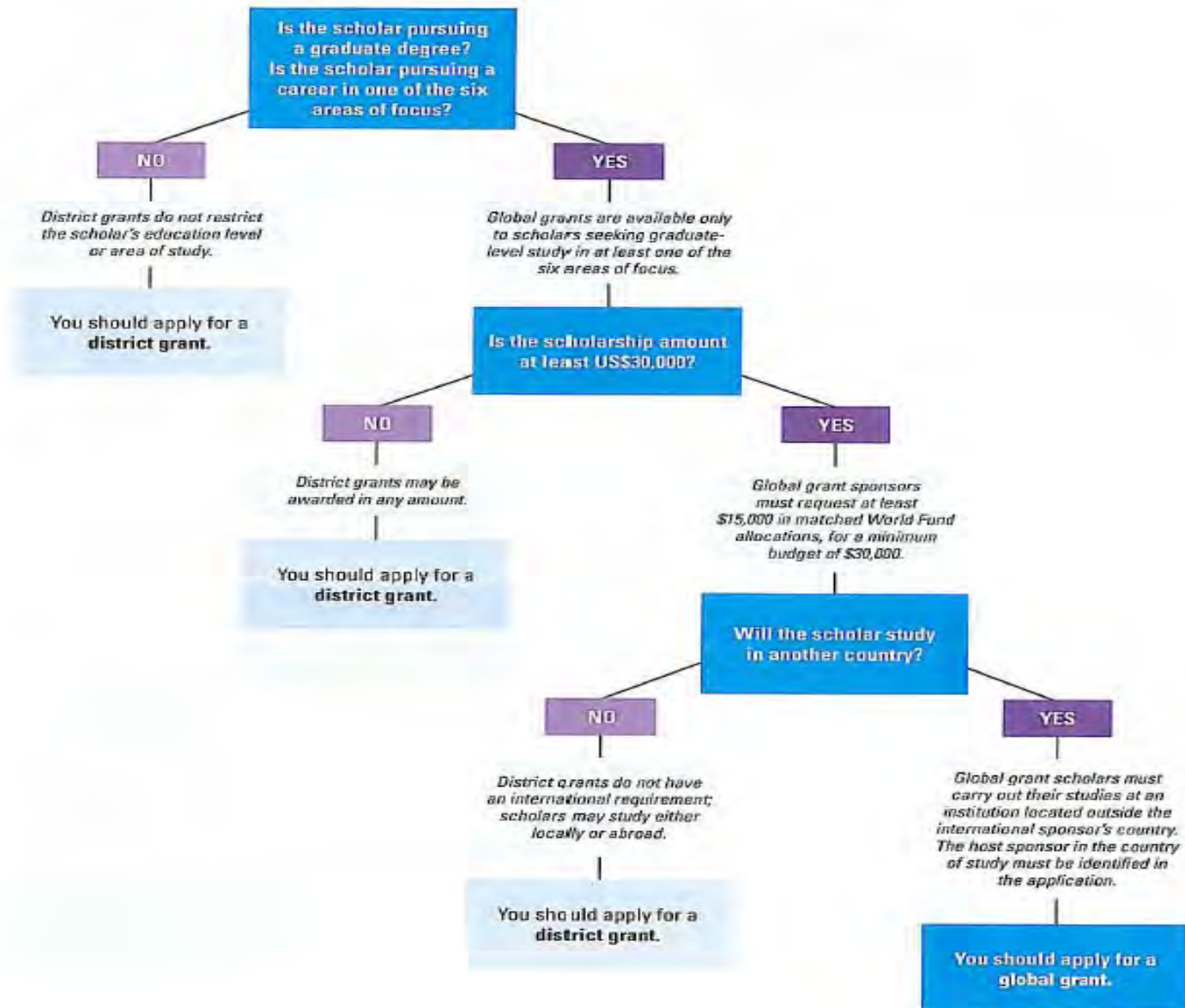
Determining a Grant Type for a Humanitarian Project

A district/club is interested in a **humanitarian project**. The following questions can help Rotarian sponsors determine whether to apply for a global grant or a district grant.



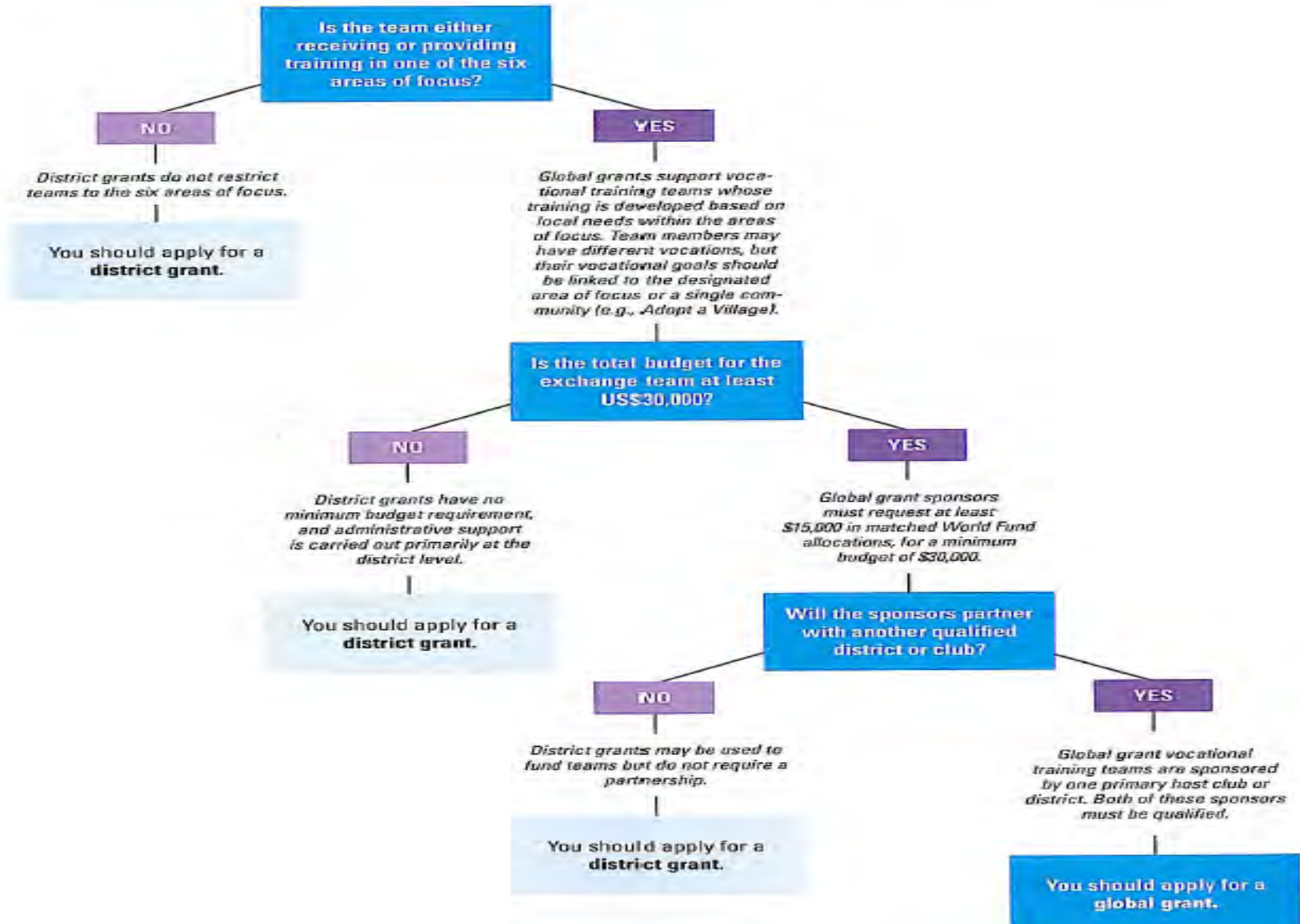
Determining a Grant Type for a Scholarship

A district/club wants to support the studies of a worthy scholar by awarding a **scholarship**.
The following questions can help Rotarian sponsors determine whether to apply for a global grant or district grant.



Determining a Grant Type for a Vocational Training Team

A district/club is interested in sending a **vocational training team** of both Rotarians and non-Rotarians to another country. The following questions can help Rotarian sponsors determine whether to apply for a global grant or district grant.



Humanitarian Projects

The following chart compares humanitarian projects under two new Rotary Foundation grants.

	Global Grant Project	District Grant Project
Cost	US\$30,000+	No minimum or maximum amount
Funding	Clubs and districts allocate DDF and/or cash, which receive a World Fund match of 100 percent for DDF and 50 percent for cash.	Districts use funds from a block grant from DDF to fund local or international projects that align with the mission.
Application	Available online	At the discretion of the sponsor district
Area of Focus	Projects must be in one of the six areas of focus.	Project not required to be in an area of focus.
Host Club	Projects are driven by host community.	Not required
Sustainability	Projects are sustainable, providing long-term solutions to community needs that will be maintained after grant funding ends.	Not required
Measurability	Projects are measurable, demonstrating impact on participants' lives, knowledge, or health.	Not required
Reports	First report within 12 months of receiving first payment; subsequent reports every 12 months thereafter for the duration of the project; final report within 2 months of project's completion	Final report documenting the disbursement of funds within 12 months of receiving payment or within 2 months of total disbursement Districts report to member clubs annually on each project that received district grant funding.
Restrictions	Restrictions apply. See terms and conditions.	Restrictions apply. See terms and conditions.

Scholarships

The following chart compares scholarships under two new Rotary Foundation grants.

	Global Grant Scholarship	District Grant Scholarship
Cost	US\$30,000+	No minimum or maximum amount
Funding	Clubs and districts allocate DDF and/or cash, with a World Fund match of 100 percent for DDF allocation and 50 percent for cash.	Districts use funds from a block grant from DDF to fund scholars for any level of study, for any length of time, either locally or abroad.
Application	Available online; must be submitted to local Rotary club	At the discretion of sponsor Rotarians
Area of Focus	Studies must be in one of the six areas of focus.	Not required
International Institution	Yes	Not required; award can be used either locally or abroad.
Host Counselor and Club	Yes	Not required, but may be arranged by sponsor Rotarians if desired
Predeparture Documents	Scholar provides to sponsor Rotarians: • Proof of admission • Proof of insurance that meets TRF requirements	At the discretion of the sponsor Rotarians
Rotary Club Presentations	Determined by international and host Rotarians	Determined by international and host Rotarians
Reports	Submitted to sponsor Rotarians and forwarded to The Rotary Foundation First report within 12 months of receiving first payment; subsequent reports every 12 months thereafter for the duration of the scholarship; final report within 2 months of scholarship's end; receipts required for expenses equal to or greater than US\$75	Final reports documenting the disbursement of funds within 12 months of receiving payment or within 2 months of total disbursement Districts report to member clubs annually on each project that received district grant funding.
Acceptance to University at Application	Scholar must be accepted to specific university at the time of application.	At the discretion of the sponsor Rotarians

Vocational Training Teams

The following chart compares vocational training teams and vocational activities under two new Rotary Foundation grants.

	Global Grant Vocational Training Team	District Grant Vocational Training Team
Cost	US\$30,000+	No minimum or maximum amount
Funding	Clubs and districts allocate DDF and/or cash, which receives a World Fund match of 100 percent for DDF and 50 percent for cash.	Districts use funds from a block grant from DDF to fund vocational training teams, cultural exchanges, and any related travel.
Application	Available online; must be submitted by local Rotary club	At the discretion of the sponsor district
Area of Focus	Team must align with one of the six areas of focus.	Alignment with area of focus is not required.
Requirements	The team must meet a humanitarian need by increasing the skill level of the team members or the benefiting community, and have a measurable impact. The grant may support travel of more than one team.	The team must support The Rotary Foundation's mission to promote goodwill and peace, improve health, support education, and alleviate poverty.
Host Club	Yes	Not required
Team Composition	Teams must consist of at least two members (either Rotarians or non-Rotarians) with at least two years of professional experience in the designated area of focus and a Rotarian leader who has expertise in the area of focus, international experience, and general Rotary knowledge. In certain cases, the Foundation may grant permission to designate a non-Rotarian as team leader. There are no restrictions on the age of participants.	The district may determine the composition of the team to include any number of Rotarians and non-Rotarians of any age.
Focus and Length of Visit	Determined by sponsors	Determined by sponsors
Reports	Submitted to sponsor Rotarians and forwarded to The Rotary Foundation First report within 12 months of receiving first payment; final report within 2 months of scholarship's end; receipts required for expenses equal to or greater than US\$75	Final reports documenting the disbursement of funds within 12 months of receiving payment or within 2 months of total disbursement Districts report to member clubs annually on each project that received district grant funding.