

DISTRICT 9465 ROTARY FOUNDATION COMMITTEE

1 May 2016

President

Rotary Clubs in District 9465

DISTRICT GRANTS 2016 - 2017

INVITATION TO APPLY

Dear President

On behalf of the District Rotary Foundation Grants Committee, I invite you to apply for a District Grant to support your nominated Project for the period 2016 – 2017. Grant applications may be for projects locally and internationally.

The Closing date will be **15 July 2016**.

This deadline enables the District to meet application dates with The Rotary Foundation so that funds will be available early in the 2016 - 2017 Rotary year.

Applications will be assessed upon the following criteria

1. Compliance with The Rotary Foundation guidelines
2. Merit of the proposed project
3. History of the Clubs giving [donations] to The Rotary Foundation
4. History of the Clubs compliance with reporting criteria on past grants
5. Planed completion of the project in the 2016 - 2017 Rotary Year.

Applications should meet the following criteria

* + - 1. Subject to funding availability, a grant up to $4,000
      2. Be limited to one application per club

The administration of District Grants is controlled by the District Foundation Committee and not by The Rotary Foundation. Reporting and compliance criteria is detailed in the guidelines.

I have attached the following documents for your convenience;

Attachment A 2015/16 District Grant Application Form

Attachment B District Grant Project Report Form

Attachment C District Grant Eligibility Guidelines and Restrictions

Regards



John Kevan

Chairman, Grants Committee

District 9465 Rotary Foundation Committee

**Attachment A**



DISTRICT 9465 ROTARY FOUNDATION COMMITTEE

DISTRICT GRANTS 2016 - 2017

APPLICATION

Please complete this application and forward to:

**TO: PDG John Kevan**

**Email john.kevan@iinet.net.au**

**Project Title**………………...………………………………………………….Date………………

Rotary Club of ……….……………………………………………………………………………

Project Description ….…………………………………………………………….…….…..….......

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…………………………………………………………………………………………………………

…………………………………………………………………………………………………………

Beneficiaries…………………………………………………………………………………………

…………………………………………………………………………………………………………

How many non- Rotarians will benefit from this project? ...............................................................................................................................................

………………………………………………………………………………………………………….

How will the project provide community members with specific skills or knowledge that will enable them to help themselves? ……………………………………………………………………………………………………………

………………………………………………………………………………………………………….…

If a cooperating organisation is involved, what is its role? …………………………………………….………………………………………………………………

…………………………………………………………………………………………………………….

How many Rotarians will be involved in this Project? …………………………………………………………………………………………………………….

***Continues over …***

**BUDGET SUMMARY**

Grant funding required $AUD………………..

**Income**

|  |  |
| --- | --- |
| **Sources of Income** | **Amount** |
| 1. District Grant funds received from the District |  |
| 2. Other funding (specify) |  |
| 3. |  |
| **Total Project Income** |  |

**Expenditure** (please be specific and add lines as needed)

|  |  |  |
| --- | --- | --- |
| **Budget Items** | **Name of Supplier** | **Amount** |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |
| 5. |  |  |
|  | **Total Project Expenditure** |  |

Items to be purchased (Copies of Quotations to be supplied if available)

……………………………………………………………………………………………………………

……………………………………………………………………………………………………………

……………………………………………………………………………………………………………

……………………………………………………………………………………………………… ….

**NB:** All costs must be receipted. All receipts must be dated within the period of the approved grant [i.e. not purchased prior to approval being received by the Club ]

**CERTIFICATION OF APPLICATION**

I hereby certify that all funds will be expended in accordance with the details of the above budget summary, and that a final report will be submitted within 12 months of the grant being approved.

President

Print name ………………………………………Signature ……………………………………

Rotary Club of……………………………………..…………………………………………….

**DISTRICT ENDORSEMENT**

PDG John Kevan ………………………..………………

Date of Approval…………………………

Amount Approved $AUD …………........

Club Notification…………….……………………Date ………………….…..

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**Attachment B**

**District 9465 District Grants - Project Report**

**Return this completed form to your District Rotary Foundation Committee Grants Chair.**   
 **John Kevan email** [john.kevan@iinet.net.au](mailto:john.kevan@iinet.net.au) Do not send this form directly to TRF.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| *Rotary Club:* |  | | | | |  |
| *Grant No.* | *Number* | | | | |  |
| *Project Title:* |  | | | | |  |
| *Progress report* | |  | *Final report* |  |  | |

**Project Description**

1. Describe the project. What was done, when, and where did project activities take place? If this is a progress report, what remains to be done?

|  |  |  |  |
| --- | --- | --- | --- |
|  | | |  |
| 2. How many people benefited from this project? |  |  | |

3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?

|  |  |  |  |
| --- | --- | --- | --- |
|  | | |  |
| 4`How many Rotarians participated in the project? |  |  | |

5. What did they do? Please give at least two examples, not including financial support provided to the project.

|  |
| --- |
|  |

*6. If a cooperating organization was involved, what was its role?*

|  |
| --- |
|  |

###### Financial Report (Club must retain receipts of all expenditures for at least five years)

|  |  |
| --- | --- |
| Currency  Used: | **Australian Dollars** |

*7.* ***Income***

|  |  |
| --- | --- |
| ***Sources of Income*** | ***Amount*** |
| *1. District Grant funds received from the District* |  |
| *2. Other funding (specify)* |  |
| *3.* |  |
| ***Total Project Income*** |  |

*8.* ***Expenditure*** *(please be specific and add lines as needed)*

|  |  |  |
| --- | --- | --- |
| ***Budget Items*** | ***Name of Supplier*** | ***Amount*** |
| *1.* |  |  |
| *2.* |  |  |
| *3.* |  |  |
| *4.* |  |  |
| *5.* |  |  |
|  | ***Total Project Expenditure*** |  |

**Certification**

By signing this report, I confirm that to the best of my knowledge these District Grant funds were spent only for eligible items in accordance with Trustee-approved guidelines, and that all of the information contained herein is true and accurate.

I also understand that all photographs submitted in connection with this report will become the property of RI and will not be returned.

I warrant that I own all rights in the photographs, including copyright, and hereby grant RI and TRF a royalty free irrevocable license to use the photographs now or at any time in the future, throughout the world in any manner it so chooses and in any medium now known or later developed.

This includes the right to modify the photograph(s) as necessary in RI’s sole discretion.

This also includes, without limitation, use on or in the web sites, magazines, brochures, pamphlets, exhibitions and any other promotional materials of RI and TRF.

|  |  |  |  |
| --- | --- | --- | --- |
| **Certifying Signature** |  | Date: |  |
| Print name, Rotary title, |  | | |
|  |  | | |

To be completed by the District Rotary Foundation Grants Chair:

|  |  |  |
| --- | --- | --- |
| Approved\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

**Attachment C**



**TERMS AND CONDITIONS FOR DISTRICT GRANTS**

For grants awarded after 1 July 2013 The Rotary Foundation (TRF) may modify the terms and conditions of the grant at any time. Updates can be found on [www.rotary.org/grants.](http://www.rotary.org/grants)

**WHAT WE FUND**

The Rotary Foundation funds district grants and global grants. District grants are block grants to districts that fund scholarships, projects, and travel that align with the mission of The Rotary Foundation, which is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty. Global grants fund scholarships, projects, vocational training teams, and some travel within the six areas of focus that are sustainable, measurable, and host community-driven.

**ELIGIBILITY GUIDELINES**

All Foundation grant activities must:

1. Relate to the mission of The Rotary Foundation
2. Include the active participation of Rotarians
3. Exclude any liability to The Rotary Foundation or Rotary International beyond the funding amount of the grant
4. Adhere to the governing laws of the United States and the host area of the grant, and harm no individuals or entities. Sponsors for projects and travel planned for countries sanctioned by the US Department of the Treasury Office of Foreign Assets Control may need to supply additional information.
5. Only fund activities that have been reviewed and approved by TRF before their implementation. Grants may not be used to reimburse clubs or districts for activities and expenses already completed or in progress. Planning for grant activities prior to approval is encouraged, but expenses may not be incurred. After grant approval, any changes to the original project plan must be pre-approved by TRF. TRF considers each semester of a degree program to be a new activity and therefore eligible for funding.
6. Demonstrate sensitivity to the host area’s tradition and culture
7. Comply with the [Conflict of Interest Policy for Grant Participants](https://www.rotary.org/myrotary/en/document/conflict-interest-policy-program-participants) as outlined in section 10.030 of [The Rotary Foundation Code of Policies](https://www.rotary.org/myrotary/en/document/757)
8. Comply with the [policy regarding the use of Rotary Marks](https://www.rotary.org/myrotary/en/document/guidelines-rotary-foundation-funded-project-signage) as outlined in section 4.090 of [The Rotary Foundation Code of Policies](https://www.rotary.org/myrotary/en/document/757)

**District Grants**

1. Support local and international projects, scholarships, vocational training teams, and related travel
2. May allocate up to 3 percent of the grant award for grant-related administrative expenses such as bank fees, postage, software, and an independent financial assessment
3. May allocate up to 20 percent of the grant for contingencies, but all projects and activities added to the grant post-approval must be pre-approved by TRF
4. May fund projects and activities in Rotary and non-Rotary countries and geographic areas where permitted by applicable governing laws and in accordance with Foundation policies
5. May fund scholar and vocational training team orientation and grant management seminars

**RESTRICTIONS**

Grants cannot be used to unfairly discriminate against any group; promote a particular political or religious viewpoint; support purely religious functions; support activities that involve abortion or that are undertaken solely for sex determination; fund the purchase of arms or ammunition; or serve as a new contribution to the Foundation or another Rotary Foundation grant.

In addition, grants cannot fund:

1. Continuous or excessive support of any one beneficiary, entity, or community
2. Establishment of a foundation, permanent trust, or long-term interest-bearing account. Grant funds can be used to establish a microcredit fund if the sponsors comply with the requirements detailed in section X. 3. Purchase of land or buildings
3. Fundraising activities
4. Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities
5. Public relations initiatives, unless they are essential to project implementation
6. Project signage in excess of $500
7. Operating, administrative, or indirect program expenses of another organization with the exception of expenses allowed within the project management allocation for global grants.
8. Unrestricted cash donations to a beneficiary or cooperating organization
9. Activities for which the expense has already been incurred
10. Transportation of vaccines by hand over national borders
11. Travel to National Immunization Days (NIDs)
12. Immunizations that consist solely of the polio vaccine
13. Study at a Rotary Peace Centre partner university in the same or similar academic program as those pursued by Rotary Peace Fellows

**District Grants**

Districts must establish a grant committee of three Rotarians, including the district governor of the implementation year, the district Rotary Foundation committee chair, and the district grants subcommittee chair.

These three committee members are responsible for authorizing and submitting the district grant application.

Districts may submit one application per Rotary year, and this application must include a spending plan. Any requests for an increase in the grant amount must be made before any portion of the grant has been paid by the Foundation.

Districts may reserve up to 20 percent of their district grant funds for contingencies that may arise during the year; note this contingency fund on the spending plan and itemize contingency items when you submit your final report.

All district grant applications must be received before 15 May of the Rotary year for which the funds are requested. (

**HOW GRANTS ARE FUNDED**

**District Grants**

District grants are funded by The Rotary Foundation solely with allocations from the District Designated Fund

(DDF). A district may apply for a single grant each Rotary year to support one or more projects using up to 50 percent of the district’s [SHARE allocation,](http://www.rotary.org/myrotary/en/annual-fund-and-share) which represents 50 percent of its annual giving from three years’ prior plus any Permanent Fund-SHARE earnings.

**COOPERATING ORGANIZATIONS**

Cooperating organizations are reputable non-Rotary organizations or academic institutions that provide expertise, infrastructure, advocacy, training, education, or other support for the grant.

Cooperating organizations must agree to comply with all reporting and auditing activities required by The Rotary Foundation and provide receipts and proof of purchase as required.

**District Grants**

All funding provided to cooperating organizations must be used for specific project expenses. The sponsoring district must maintain an itemized report of such expenses.

**PAYMENTS**

**District Grants**

Grant funds will be paid only to the district or district foundation bank account identified by the district at the time of application. District grant funds will not be released until the previous Rotary year’s district grant is closed. District grants are paid out at the current RI exchange rate at the time of payment.

Funds are not available after the close of the implementation year; if sponsors do not meet all payment requirements by 15 May of the implementation year, the grant will be cancelled.

**REPORTING REQUIREMENTS AND DOCUMENTATION**

Grant recipients are responsible for reporting on the use of grant funds to the District Grants Chairman. Progress and final reports must be submitted online and all forms must be completed in their entirety for the report to be accepted.

New grant applications will not be accepted if a grant sponsor has an overdue report for any Foundation grant.

The Foundation reserves the right to review grants at any time, conduct an audit, send a monitor, require additional documentation, and suspend any or all payments.

The following reporting criteria also apply to grant recipients:

1. Unused grant funds must be returned promptly to the District Rotary Foundation account.
2. Districts must report the use of grant funds to their member clubs in accordance with the terms of qualification.
3. Grant sponsors must maintain copies of all receipts and bank statements related to grant-funded expenditures in accordance with the terms of qualification and any applicable local and international laws.
4. Grant sponsors who fail to adhere to Foundation policies and guidelines in implementing and financing grant projects must return grant funds in their entirety and may be barred from receiving future grants for a period of up to five years.

**District Grants**

These additional criteria apply to district grants:

1. Final reports documenting the disbursement of funds must be submitted to the Foundation within 12 months of receiving the payment, or within two months of the grant’s total disbursement.
2. All grant projects and activities funded by district grants must be completed within 12 months of disbursement by the Foundation or the local district to the club or project site.
3. Unused grant funds in excess of US$500 must be returned promptly to The Rotary Foundation and will be credited to the district’s DDF.

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