

**The Grants Programs
Of The Rotary Foundation
and
Rotary District 5010**

Manual of Policies and Procedures

For Individual Rotary Clubs



Mission

The mission of The Rotary Foundation 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.

Areas of Focus:

- Peace and conflict resolution/prevention
- Disease prevention/treatment
- Water and sanitation
- Maternal and child health
- Education and basic literacy
- Economic and community development

Grants offer opportunities for Clubs to form **partnerships** to provide maximum humanitarian impact, to increase the involvement of Rotarians in grant projects, and to observe first hand the many reasons to support The Rotary Foundation.

Rotary Foundation District Grants offer Clubs the flexibility to respond to defined needs or to plan projects locally or in other countries that fit within the mission of The Rotary Foundation. These grants can be used for a wide variety of activities, including, but not limited to, funding scholarships, supporting vocational teams, sponsoring volunteer service, providing disaster relief, and carrying out community and international service projects. Clubs submit online applications which are reviewed by a District Grants Resource Leader and the District Grants Chair.

Rotary Foundation Global Grants support larger, international projects with sustainable, high-impact outcomes in one of the areas of focus that correspond to the Foundation's mission.

Clubs and the District can create their own Global Grant projects.

Global grants that are developed by clubs and the district will receive a match from the Foundation's World Fund. These grants can be used to sponsor scholars or vocational training teams or to develop large-scale humanitarian projects with clubs and districts in other countries.

Procedures:

District Grants. Clubs will submit a proposal for use of District Designated Funds (DDF) by **April 20** of the year prior to project implementation. Grant proposals must show Rotarian involvement. Rotary funds are restricted for designated project expenditures. A publicity plan is required. District Grant Allocations will generally be based on past contributions to The Rotary Foundation Annual Program Fund. The District will compile all projects and submit a request for

a District block grant to The Rotary Foundation. Once the block grant has been approved by The Rotary Foundation, clubs will be notified and funds may be spent.

District funds will be available on or shortly after July 1 of the new Rotary year.

Unused DDF previously allotted to a club will revert to the District if not applied for by October 31 of a Rotary year. Clubs must be qualified to receive District Grant funding, and have completed a Memorandum of Understanding (MOU).

District Grants will be applied for online at the D5010 web site <http://www.matchinggrants.org/district>. A club may submit up to three District Grants per Rotary year. DDF must be matched 1:1 with cash. The project must be completed and a Final Report submitted within four weeks of completion, or by June 1 of the Rotary year in which the funds were disbursed.

In the event more funds are requested than exist for District Grants, the following criteria may be used by the District Grants Committee to determine club allocations.

- A. Club is fully qualified
- B. The number of people who will be impacted by the grant
- C. Impact of grant measured against Rotary's six areas of focus (even though not required for a DG)
- D. Club's track record for implementing and managing grants
- E. Involvement of Rotarians
- F. Contributions to The Rotary Foundation Annual Program Fund

Global Grants will be handled on a first come first served basis until our District Designated Funds (DDF) are committed. There will be no maximum amounts. Each grant must target one of The Rotary Foundation's **Areas of Focus**. **Prior to starting a Global Grant, a short project synopsis with budget should be submitted to the District Grants Committee and the Regional Global Grants Resource Leader.**

For Club- and District-developed **Global Grants**, once a formal application is submitted, the Foundation may require additional levels of assessment, depending on the award amount or complexity of the project. Only club- and district-developed global grants of US\$100,000 or more will require approval by the Trustees.

Clubs must set up a separate bank account for processing of Global Grant Funds.

There are two types of global grants:

- **Club- and district-developed Global Grants**, which are partially funded by the sponsors and receive a match from The Rotary Foundation's World Fund. Based on a 100 percent match of DDF allocations and/ or a 50 percent match of cash contributions.
- Have a minimum World Fund (Rotary match) award of US\$15,000 and maximum of \$200,000, support larger humanitarian projects with sustainable, high-impact outcomes; scholars; and vocational training teams in one of the areas of focus.
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Qualification for The Rotary Foundation Grants Program

A Qualified Club must submit both the Memorandum of Understanding (MOU), plus be current on District and RI dues, and all Grant reports. They may participate in grant activity and use, donate or trade their DDF.

The District must provide grant management and qualification training to the clubs annually. Each club must designate a representative and an alternate for each year of qualification. At least one of these official club representatives must attend a Grants Management training Seminar. Other club members are encouraged to attend, in order to broaden the knowledge base of the club.

Document Retention

Original documents must be maintained for a period of five years.

Clubs must agree to periodic, random audits of their documents. Failure to provide reasonable access to documents by District Rotary Foundation personnel or Audit Committee, or to maintain the required documentation would result in immediate disqualification for the use of The Rotary Foundation Grant funds.

Rotary District 5010

Conflict of Interest Policy for Program Grant Participants

All individuals involved in a program grant and/or award shall conduct their activities in a way that avoids any actual or perceived conflict of interest. A conflict of interest is a relationship among individuals through which an individual involved in a program grant or award causes benefit, or could be perceived to cause benefit, for such individual or such individual's family, personal acquaintances, business colleagues, business interests, or an organization in which such individual is a trustee, director, or officer.

Principles of Sustainability for Global Grants

The Rotary Foundation strongly encourages Rotarians to apply the following principles of sustainability to all projects and activities.

1. Global grants incorporate activities and safeguards that ensure the continuity of project impact after TRF funding is fully expended.
2. Global grants work toward multiple levels of sustainability: economic, cultural, social and resource.
3. Global grants make optimal use of local resources, regional input and indigenous knowledge as much as possible.
4. Global grants respect the natural resource base and avoid deterioration or destruction of the local government.
5. Global grants attempt to reach the greatest number of beneficiaries as appropriate.
6. Global grants prepare scholars and individuals to contribute to new and innovative methods in professional fields reflected within a Foundation area of focus.
7. Global grants prepare participants to increase impact and improve effectiveness in the communities and vocations in which they work.
8. Global grants utilize the input and skills of grassroots individuals and groups, such as Rotary Community Corps to ensure continuation of projects and activities.