

# Terms and Conditions for Rotary District 5080 District Grants

Effective from Program-Year 2019-2020



The Rotary Foundation (TRF) and/or Rotary District 5080 may modify the terms and conditions at any time.

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**NOTE:** The Rotary Foundation's **Terms and Conditions for Rotary Foundation District Grants and Global Grants**, except the requirements specific to global grants and District (Block) Grant reporting, apply to **Rotary District 5080 District Grants - Local Projects and District Grants - International Projects**. The Rotary Foundation may modify these terms and conditions at any time, so always refer to the most recent version on [rotary.org](http://rotary.org). In addition, **the following specific terms and conditions also apply**.

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## A. What We Fund

The Rotary Foundation (TRF) 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. The district offers, to Rotary clubs in District 5080, two types of grants from the District (Block) Grant: District Grants for Local Projects and District Grants for International Projects.

## B. Eligibility Guidelines

The eligibility guidelines outlined in TRF's Terms and Conditions for Rotary Foundation District Grants and Global Grants (Section II) apply.

In addition, District Grants must comply with the District 5080 Policy Manual Sections 9.03 – 9.04, TRF Code of Policies (Section 33.070), and the Club-District Memorandum of Understanding.

### District Grants – Local Projects

1. Support local service projects
2. Do not require a partnering Rotary club.
3. Should address the most pressing needs of our local communities and whenever possible support the seven areas of focus of The Rotary Foundation

### District Grants – International Projects

1. Support international service projects
2. Do not require a partnering or host Rotary Club; however, it is highly recommended that clubs partner with Rotarians in the host country of an international service project
3. Should address the most pressing needs of the communities in the host country and whenever possible support the seven areas of focus of The Rotary Foundation

## District Grants

Projects that align with the mission of The Rotary Foundation, and meet most of the following objectives are considered the most suitable for District Grant – Local Projects and District Grant – International Projects:

- a. Humanitarian need – what are the important humanitarian needs of the community (local or international) and how does the project attempt to meet those needs?
- b. Persons served – how many persons will be served by the grant?
- c. Planning – did the club conduct a needs assessment in any form or is the club offering its own solutions without consulting the community to be served? Does the project respect the wishes of the community in need?
- d. Innovation – does the project seek new innovations to problems affecting communities or is it merely a repeat of previous years' projects? If the project is a repeat project, has the project committee determined whether the project remains relevant to the community being served?
- e. Sustainability – does the project attempt to provide long-term solutions to humanitarian needs or does it merely provide consumable goods that will only temporarily alleviate suffering? Will the benefit to the community continue once the project has been completed?
- f. Areas of Focus – Does the project align with the seven areas of focus (not required but encouraged) (peace and conflict resolution; disease prevention and treatment; water and sanitation; maternal and child health; basic education and literacy; economic and community development, the environment)
- g. Participation – how involved are Rotarians in the implementation of the project? Is most of the implementation being done by the cooperating or benefiting organization? Are Rotarians merely delivering goods or are they further engaged in the outcomes of the project? For example, in a literacy project are the Rotarians simply handing out books to children or are they engaged in reading to children or mentoring the parents to encourage reading to their children? Has the Rotary Club involved youth services, such as Rotaract and Interact club members, in the project?
- h. Publicity – will the project be well-publicized, bringing needed attention to the work of Rotary in the community? Will the recipients know that the project was sponsored by Rotary and the Rotary Foundation? Or, will the cooperating or benefiting organization receive most of the publicity? Does the project have the potential to inspire the community to support Rotary and encourage future giving to the Rotary Foundation?
- i. Stewardship – are there any conflicts of interest inherent in the project? Does anyone serving on the project committee work for the cooperating or benefiting organization in a leadership capacity? Does anyone serving on the project committee stand to gain business or financial benefit from the provision of goods or services in the implementation of the project?
- j. Foundation support – what is the club's history for giving to the Annual Programs Fund? Is the trend favorable? Is the club setting reasonable goals and making progress in its per capita giving? Funds for District Grants are made available in accordance with our District's contributions to the Rotary Foundation.
- k. Reporting – has the club reported on time with past grants? Has the club submitted incomplete reports in the past? Have there been problems with lack of receipts, unapproved budget substitutions or project changes after grant approval?
- l. Has the club received any District Grants in the past? Priority may be given to clubs with competitive projects that have not received District Grants in the past.
- m. Technical considerations – does the project meet all the qualifications of humanitarian grants set forth by the Rotary Foundation?

## C. Restrictions

The restrictions outlined in TRF's Terms and Conditions for Rotary Foundation District Grants and Global Grants (Section III) apply.

## D. How to Apply

The District is required to submit a spending plan when applying to The Rotary Foundation for the District (Block) Grant. As a result, Rotary clubs planning a District Grant project during the following program year will submit an application to the District Grants Subcommittee in March-April before the following program year starts (dates to be announced by the District). Approvals will be contingent on the District receiving the District (Block) Grant from The Rotary Foundation. In addition, project activities (except planning) and expenses already completed or in progress at the time of The Rotary Foundation's approval of the District (Block) Grant are ineligible. The District will notify clubs as soon as District (Block) Grant approval is obtained.

The District will not apply specific percentage allocations of funds to either local or international service projects. Grants will be awarded on a competitive basis until funds are fully committed. **Grant applications that are not funded due to a lack of available funds in any one year will not be carried forward from one Rotary year to the next.**

Clubs must be qualified in order to receive a District Grant (have three or more club members complete a Grant Management Seminar, or approved alternative, sign the Club Memorandum of Understanding (MOU) including the District 5080 Addendum and implement the stewardship requirements in the document). It is required that each has at least two members complete Grant Management Seminar training prior to receiving any TRF grant funds.

In addition, clubs and all grant committee members must be in good standing with Rotary International and The Rotary Foundation. Clubs that are delinquent in reporting on any Rotary Foundation Grant, including incomplete reports, are not eligible to apply for a District Grant. Clubs must also not be delinquent in meeting the reporting requirements established from time to time by the District Rotary Foundation Committee, and not be delinquent in payment of dues or other debts for more than 90 days to District 5080.

Individuals prohibited from serving on a grant committee include RI fiscal agents, national treasurers, and officers and paid staff of a cooperating or beneficiary organization associated with the grant. When acting as a primary sponsor, all clubs are limited to one (1) open District Grant – Local Projects and one (1) open District Grant - International Projects per funding cycle.

The primary sponsor club must establish a grant committee of three Rotarians for a District Grant. Members of this grant committee must come from the primary sponsor club.

## E. How Grants Are Funded

Each club may apply for a District Grant – Local Projects of \$1,000 to \$5,000 USD annually. Each club may apply for a District Grant – International Projects in the amount of \$1,000 to \$10,000 USD annually. The clubs will receive District Grant project funding once the project is approved by TRF and the funds are received from TRF.

The DDF match for a District Grant will be made on a 1:1 basis (matching only club contributions from District 5080 Rotary Clubs), not to exceed the maximum allowable grant per club. However, at its discretion, the Grants Sub-committee may award grants for lesser amounts if there are more grant requests than available funds. When paying for project expenses, clubs must use club funds first; once club funds are fully spent, clubs can use grant funds to pay for the balance of project expenses. Clubs are encouraged to partner on projects in order to increase the impact of the project. Multiple clubs may be included on a single grant application.

Grant financing cannot be changed after approval. While the grant amount remains unchanged, the budget may undergo changes, provided those changes are pre-approved by the District Grants Subcommittee Chair.

## F. Cooperating Organizations

The requirements outlined in TRF's Terms and Conditions for Rotary Foundation District Grants and Global Grants (Section VII) apply.

In addition, at the time of application, grant sponsors need to provide a memorandum of understanding (MOU) signed by the primary sponsor and the cooperating organization. The MOU should include the following:

1. Verification from the primary sponsor that the grant is initiated, controlled, and managed by the Rotary club
2. Endorsement from the primary sponsor affirming that the cooperating organization is reputable, responsible, and acting within all governing laws
3. Grant implementation plan clearly delineating the activities of each party
4. Agreement from the cooperating organization to participate in any financial review by the Foundation of activities connected with the grant

## G. Payments

Grant funds will be paid only to the primary sponsor club identified at the time of application. District grant funds will not be released until the previous Rotary year's District (Block) Grant is closed, and the current program year's District (Block) Grant funds are received by the District from The Rotary Foundation. Funds are not available after the close of the implementation year; if sponsors do not meet all payment requirements by 30 April of the implementation year, the grant will be canceled.

If a grant project is canceled after the project sponsor receives payment, all grant funds must be returned promptly to Rotary District 5080.

## H. Reporting Requirements and Documentation

The District Grant reporting requirements outlined in TRF's Terms and Conditions for Rotary Foundation District Grants and Global Grants (Section IX) apply to the District (Block) Grant received by the District from The Rotary Foundation. **In addition, the following reporting requirements apply to Rotary District 5080 District Grants.**

For District Grants **of either type**, clubs failing to submit a final report within two months of project completion or a progress report no later than April 15 of the program year, or misusing grant funds, will be required to repay the full amount of the grant to District 5080. In addition, the club will lose its qualification, and will be ineligible for further grant funds - either District Grants or Global Grants, until all outstanding reports and supporting documentation have been filed satisfactorily, the District Rotary Foundation Committee has closed the grant, and the club has been re-qualified. [NOTE: If a progress report is submitted by April 15, the Final Report is due within two months of project completion, no later than Dec. 31 (18 months after grant approval).

All unused grant funds are to be returned to the District Rotary Foundation Committee promptly upon completion of any grant funded project, and may not be carried forward or applied to future projects by the sponsor club(s).

A club that has been more than 12 months delinquent in reporting or has used funds for ineligible expenses without promptly returning the funds to the District may be suspended from future grants for a period up to five years.

The club is responsible for the proper disbursement of Grant funds as specified in these Terms and Conditions, District 5080 Policy Manual Sections 9.03 – 9.04, TRF's Terms and Conditions for Rotary Foundation District Grants and Global Grants, TRF Code of Policies (Section 33.070), and the Club Memorandum of Understanding (MOU). Transferring District 5080 Grant funds to another Rotary Club or cooperating organization does not relieve the Club of this responsibility. The club is responsible for promptly repaying to District 5080 any Grant funds not properly disbursed or accounted for.