Adopted by the Grants committee: June 12, 2025

This document presents the D6440 policies for Clubs that desire to participate in The Rotary Foundation (TRF) Global Grant program. District 6440 policies are proposed by the Grants Committee and approved by the District Governor. Complete information regarding the various Rotary grants is available at www.rotary.org/grants. Specific District 6440 grant information is outlined below; detailed documents are available at the District 6440 website.

#### **GENERAL GUIDELINES FOR MATCHING GRANTS**

## **Organizational Structure for Matching Grants**

- District Designated Funds (DDF) in Rotary are contributions from clubs within a district
  to The Rotary Foundation's Annual Fund SHARE, which can then be used to support
  local and international humanitarian projects. The general giving totals for each district
  will be divided by TRF into two categories indicating the actual fund into which they will
  be placed: the District Designated Fund (50%) and the World Fund (50%).
- The District's annual DDF eligibility is determined by TRF as a portion of the total
  amount contributed by members to TRF's Annual Fund SHARE during the third year
  preceding the current Rotary Year. For example, DDF eligibility for the Rotary Year
  2025-2026 is based on the contributions to the Annual Fund SHARE by members
  during the 2022-2023 Rotary Year. Only contributions to Annual Fund SHARE are
  eligible for DDF eligibility.
- The available total which is given by TRF to the District before the start of each year is inclusive of the available District DDF plus a portion of the interest earned on investments by TRF.
- D6440 is the recipient of District Designated Funds (DDF) distributed by TRF each Rotary Year. The DDF can be applied to:
  - District Grants
  - Global Grants
  - Global Scholarship Grants
  - Other Rotary Programs, including End Polio Now, Rotary Endowments and Peace Centers
- By District policy, the DDF received by the District is made available to clubs for District or Global Grants, in the following manner:
  - A Club's annual DDF Maximum Matching Grant Eligibility) received from TRF through the District Grants Committee is equal to 47.5% of the total amount of giving by the club and its members to the TRF's Annual Fund Share during the third year preceding the current Rotary Year.
  - Each year the District Governor designates the split of TRF's Matching Grant funding up to a maximum of fifty percent (50%) to the District Grant allocation with the balance to Global Grants. Each Rotary Year the selected ratio will be announced prior to the preparation of the grant applications by the Clubs.

- Clubs may use up to 50% of their DDF eligibility for District Grants. Any DDF not used for District Grants may be used for Global Grants.
- Newly formed clubs will be allocated \$1,000 by District 6440 as DDF for its charter year and the two following years. Each year up to \$500 may be used for a District Grant and the balance for Global Grants.
- The eligibility of each Club for District and Global Grants is shown on the District website: DDF ELIGIBILITY.
- District Grants: The Rotary Foundation accepts only one application annually per District for all District Grants. Following the submission of the District Grant applications by clubs, the Committee prepares a Block Grant application to TRF for District Grants.
- The total amount requested in the Block Grant is a compilation of the applications for District Grants submitted by the Clubs plus a reallocation of the uncommitted DDF to funds administered by the District Governor and the Grants Committee.
- If any District Grant eligible DDF held by a club is not included in the Block Grant, that DDF may be distributed to that club's eligible Global Grants.
- Any funds given to a club for an approved District Grant which are not used must be reported as part of the Final Grant and be returned to TRF

# **Club Qualifications for a District Matching Grant**

- To qualify for any District Matching Grant including all involving the use of TRF and District funds -- each Club must prequalify by completing four (4) identified steps prior to the submission of any grant application:
  - The President-Elect or a designated representative who will be directly involved in leading the preparation of grant submittals must participate in the annual District Grant Management Seminar (GMS), usually held in February. A Memorandum of Understanding for each Rotary Year must be filed by the President-Elect and witnessed by the current President and/or Secretary. The appropriate form is Memorandum of Understanding which is available on the D6440 website
  - Each Rotary Year the President-Elect must register the Club's GOALS for Annual Fund - SHARE, End Polio Now, and Club Membership in the Rotary Club Central site, and
  - The President-Elect must file a Youth Protection Certificate which is also available on the D6440 website.
  - Additionally, the Club President must ensure that, for each District Grant awarded during the year, a timely and complete final report is filed with the Grants Committee within thirty (30) days following the completion of the project but not later than June 15th of that Rotary Year. The Final Report document is posted on the District website. The Final Report must include supporting documentation of the District and club cash disbursed in conjunction with the project. Clubs are required to retain a record of finances for a period of seven (7) years following the submittal date of each Final Report.

#### **DDF Match Guidelines**

- The DDF eligibility of each Club for the current Rotary Year is shown on the District website DDF ELIGIBILITY.
- Clubs determine the project(s) and amount(s) to be committed, governed by TRF policies.

### **Policies Applicable to Global Grants**

- Global Grants fund Large Humanitarian and/or Educational Projects: Minimum \$30,000
- District clubs hosting or participating in Global Grants must adhere to all Rotary Foundation Terms and Conditions for Global Grants, including the Areas of Focus, Sustainability and Community Needs Assessments Requirements.
- DDF Matching Policy for Global Grants
  - Each \$1 in DDF requires a cash match of at least \$1. The required cash match may be provided by any contributing sources, anywhere in the world.
  - As of this current Rotary year, TRF matches DDF \$.80 from World Fund for each \$1 DDF, up to a maximum of \$400,000 in total grant request.
  - A minimum of 15% grant contributions must come from outside the project country.
  - TRF does not match cash contributions.
- Global Grant application process:
  - The Club Request for DDF and/or Cash support for a Global Grant must be completed by a club using cash, DDF, or a combination of cash/DDF for a Global Grant. This will be used by the Grants committee to approve DDF requests. The Deadline for submitting a request for DDF/Cash support for a Global Grant is March 15 of each year.
  - Clubs who are a grant Host are required to use the Global Grant Financing Planner found on the District website, and report to the District Global Grant Chair the DDF, Cash, International Host and participating clubs.
  - The Grants Committee will review the request and approve the request or request additional information from the applying club. Then the Grants Committee can track and report on the District DDF commitment.
- DDF Carry Forward
  - A club can make cash and/or DDF pledges in one Rotary Year for a Global Grant that doesn't get approved by TRF until a future year.
  - The cash should not actually be contributed until TRF Global Grant approval. The DDF amount is automatically provided by TRF after all the cash funds are collected for a TRF approved grant.
- DDF return if a grant is canceled
  - If a Global Grant is canceled, all DDF pledges by participating clubs within the

district will be "returned" to them, so that the club may use that DDF for another Global Grant, provided however, the DDF must be used for a Global Grant no later than the June 30 of the succeeding Rotary year.

- If the host or international host club is located within District 6440, the DDF will not be returned to the club.
- Deadlines: Clubs can submit completed Global Grant applications to TRF year-round on a rolling basis. Requests for DDF must be submitted to the Grants committee using the <u>Club Request for DDF or Cash form.</u> Only when TRF approves a global grant application will the dollar equivalent of the requested DDF be awarded to the Host Club. The Host will then request each club to fulfill its cash pledge.

For assistance contact the Global Grants chair: globalgrants@rotary6440.org

Available Resources for Global Grants can be found on the My Rotary.org website or at the D6440 grant website.

### **Policies Applicable to Global Grant Scholarships**

#### **General Features**

- Scholarships provide support for International Graduate level study
- Duration: One to Four Years
- Studies must be aligned with one of the Rotary Areas of Focus

### **Global Grant Scholarship Funding**

- Global grants have a minimum budget of \$30,000 and a maximum World Fund award of \$400,000. Grant sponsors (Districts) can use a combination of District Designated Funds (DDF), cash, and/or directed gifts and endowment earnings to fund a Global Grant Scholarship. The Foundation will provide a 100 percent World Fund match for all DDF contributions. There is no minimum World Fund match. Global Grant Scholarships are funded by District DDF and TRF Endowment Funds. DDF is drawn from the fund for the year in which the application is approved.
- Club cash is not required.
- District preference is to fund Global Grants Scholarships with TRF Endowments, then District DDF if necessary.

The District 6440 Global Scholarship Chair will take the lead to identify scholarship applicants, assist with the application process and oversee the scholarship program.