

Explanation of Key Grants Available to Clubs/Entities in district 5840 (Revised 11/15/11)

District Rotary Foundation Committee Chairman

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Key Points	District Simplified Grant (DSG)	Rotary Foundation Matching Grant	District 5840 Donor Advised Fund (DAF)
Purpose	To support the service activities or humanitarian endeavors of District 5840	To provide funds for international humanitarian service projects involving Rotary clubs or districts in two or more countries. Caution: The coordination and timing often bridges two or more Rotary years.	To provide funds for District 5840 entities for humanitarian projects within the District or for approved projects outside the District which are headed up by a Sponsoring Organization of District 5840.
Where to Apply	Chris Byrd, Chairman, District Simplified Grant Subcommittee 8 Spencer Road, #200 Boerne, TX 78006 (830) 249-3500 cbyrd@boerneattorneys.com	David A. Ives, Chairman, District Grants Subcommittee 3531 Hunter's Circle San Antonio, TX 78230-2812 divessatx@msn.com	PDG Dick Baggett, Chairman, District 5840 DAF Committee P. O. Box 3370 San Angelo, TX 76902 dbaggett@wcc.net
Amount Available	\$20,000 for District allocation in 2011-2012 Clubs may apply for a maximum amount of \$2,500. Clubs must match the amount of money they are asking for. Grants are awarded on a first-come, first-served basis.	Matching Grants: \$5,000--\$200,000 Total funding release at TRF does regulate approval; the earlier the submission, the better. See "Deadlines Grant Forms Are Due" below.	Maximum of \$5,000 per year per Sponsoring Organization.
Source of Funds	Maximum of 20% of District Designated Funds, which is based on 50% of annual giving three years prior. Funds are provided to the District for distribution.	Participating clubs and/or districts as original cash contributions which are matched by RI. Cash funds are matched @ 0.5:1 by TRF. If District Designated Funds (DDF) are used, TRF will match this portion at 1:1. The non-sponsoring club/district must provide at least 50% of the unmatched funding. DDF does not have to be used but has the advantage of a better matching ratio.	Proceeds from the initial investment of \$320,000, a gift from the Host Organizing Committee of the San Antonio International Convention of 2001; an additional \$1,000 memorial gift from the San Angelo Sunrise Rotary Club. Grant applications cannot invade the current corpus of \$321,000.

Eligible Recipients	All Rotary Clubs within District 5840 are eligible to submit requests for DSG funds. All recognized District Committees are also eligible to submit requests for DSG funds.	Any club within District 5840 in concert with clubs or districts outside the boundary of the USA. Caution: The eligibility is actually the project itself ; please review the eligibility statements at the RI website, www.rotary.org .	The geographic area for the advisory committee's grant recommendations shall be to qualified charitable organizations which serve the counties in Texas comprising Rotary District 5840 as it exists in 2002, being 44 counties, or other areas outside of District 5840 that may include Mexico as deemed appropriate by the advice and consent of the District Governor or his/her advisory committee.
Deadlines Grant Forms Are Due	Requests for funds are processed in the sequence they are received.	Applications accepted: 1 July through 31 May Approvals granted: 1 August through 15 May There are two meetings (Oct. and April) where the applications are presented and acted upon.	Throughout the Rotary year.
Approvals Made By	District 5840 DSG Subcommittee of the District 5840 Rotary Foundation Committee	The Club President of each participating club (for club's commitments). The District Governor of each participating District (for district's commitments). District 5840 Matching Grant Subcommittee Chair (review for completeness). Trustees of The Rotary Foundation for approval and funding release.	Only by the District 5840 DAF Committee.
Where to Obtain Forms for Submitting Grant Requests	www.rotary5840.org (The Rotary Foundation/District Simplified Grants)	www.rotary5840.org (The Rotary Foundation/Matching Grants)	www.rotary5840.org (Donor Advised Fund section) or by emailing PDG Dick Baggett at dbaggett@wcc.net
RI/District Entity Approving Grant Requests	DSG Subcommittee of the District Rotary Foundation Committee	The Rotary Foundation Trustees	District 5840 DAF Committee

<p>Special Conditions</p>	<ol style="list-style-type: none"> 1. Requests must provide an explanation of how Rotarians will be involved in the project. 2. Use of funds must comply with the guidelines of the Rotary Foundation Trustees. 3. Records of disbursement and accounting of funds must be maintained for three years. 	<ol style="list-style-type: none"> 1. Once approved and funding is released, there are many reports required and due to RI through the life of the project and beyond, all geared to proper use of the funds and effectiveness of the program. Be aware and prepared for these reports. 2. Paul Harris credit is given for each new \$1,000 increment of club funding. 3. If club(s)/district(s) have outstanding reports due from previous grants, the application will not be considered. 	<p>Receipt, disbursement and accounting of funds must be done by a legally authorized 501(c)(3) entity. The Sponsoring Organization must be or have an affiliated partner which is a 502(c)(3) entity. Proof of this is a requirement of the application process.</p>
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