

Rotary International District 5870



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District Grants Chair

Dear District 5870 Rotarians,

I'm pleased to announce that District 5870 will be sponsoring **four (4)** Rotary Foundation (TRF) District Grant Vocational Scholarships for the 2018-19 Rotary Year!

Since the nature of these scholarships is left up to each district to determine, DG Bruce Golden has decided that our District Grant Scholarships will support vocational students who:

1. Live in one of the 23 counties that comprise District 5870;
2. Are planning to study at a community college or technical school located in one of these 23 counties; and
3. Plan to remain here to work after completion of their studies.

For the purposes of these scholarships, **vocational education and training** is defined as education that prepares students for jobs, careers at various levels from a trade to a craft, or a position in engineering, accounting, nursing, medicine and other healing arts, architecture, pharmacy, and law that do not require a 4 year college degree to perform. Please see Section 2 for the areas of study that are acceptable for study under a District Grant Vocational Scholarship. Note that these scholarships are not intended for students wanting to attend a community college or technical school with the intent of later transferring any credits earned to a 4 year, upper level college.

Each District Grant Scholarship will be \$5,000, entirely funded with District Designated Funds (DDF) and can last up to two years, thereby enabling you to fund this training through certification. **Sponsoring clubs will be expected, however, to contribute at least another \$250 towards the student's expenses and can, if they desire, increase this amount to cover project costs.**

District Grant Scholarships require that:

1. Scholars must gain their own admission to school before the grant application is submitted to District 5870 for funding, and
2. Scholarship management is the responsibility of the sponsoring club. District 5870 will deposit \$5,000 in your club's Foundation bank account and you will be responsible for disbursing these funds in accordance with the Terms and Conditions for Rotary Foundation District Grants (see Section 9).

The District Foundation Scholarships Committee will help guide you through the process. We are aware that you may have many questions as you move forward with these scholarships under TRF guidelines, and this packet has been compiled to help you begin to understand the process.

Importantly, remember that Clubs wanting to sponsor a District Grant Scholar must be qualified under TRF and District 5870 guidelines before they can do so.

- a. These guidelines were provided to your Club President at either Pre-P.E.T.S. or Lone Star P.E.T.S. and are included in this packet for your reference (see Section 8). *The person you select as your club's Scholarship Counselor is required to be Grant Management Certified.*
- b. Clubs must complete all qualification requirements before they can receive District Grant funding for a scholarship.

Lastly, there are several ways in which your club can participate hands-on in the scholarship process. You will find information about these opportunities inside:

- 1) Sponsoring a scholar candidate;
- 2) Promoting members to join the District Scholarship Committee

As always, please contact me with questions and I will make every effort to maintain our District 5870 website scholarship pages.

Yours in Rotary Service,

Rich Kaye
District Rotary Foundation Chair, 2015-18

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Table of Contents

1. General Qualifications and Requirements.....	5
2. Areas of Study.....	7
3. A Focus on Service Learning.....	9
4. Timeline for Selecting a 2018-19 Scholar	10
5. Sponsoring a District Grant Scholar.....	11
6. Student Expenses Worksheet	14
7. Sponsoring Club Expenses Worksheet	15
8. Club Qualification Requirements	16
9. Terms and Conditions for Rotary Foundation District Grants.....	17
10. 2018-19 District Vocational Scholarship Application.....	22

1. General Qualifications and Requirements

- District Grant scholarships are intended to fund vocational education or training at a community college or technical school located in one of the 23 counties that comprise District 5870.
- The training program must be no less than one academic year in length, and no more than two years.
- Scholarship applications will be scored based on a combination of need, merit, previous work in the area of study (if any), and the applicant's career plans.
- Students who are awarded a vocational scholarship will be eligible to apply for a second (or follow-on) scholarship in order to continue their education provided that their academic record at the conclusion of their initial scholarship is acceptable. *However, absolutely no preference will be given to students applying for a second (or follow-on) scholarship.*
- Each successful scholarship candidate will be required to complete a humanitarian service project during his or her period of study (See Section 3).
 - The student will be expected to provide an outline of the project and its anticipated budget during his or her district interview.
 - The project must be conducted within District 5870 and be within the student's area of study.
 - Sponsoring clubs are responsible for ensure that the project is completed, and that it adheres to the Terms and Conditions for Rotary Foundation District Grants (See Section 9).
- The scholarship candidate must:
 - Reside in one of the 23 counties that comprise District 5870;
 - Agree to study one of the areas listed in Section 2;
 - Agree to complete a humanitarian service project during his or her period of study;
 - Begin his or her academic program during the 2018-19 Rotary Year;
 - Agree to work in one of the 23 counties that comprise District 5870 following graduation and/or certification; and
 - Complete a District 5870 Vocational Scholarship Application (See Section 10).
- At the time of the district interviews, the scholarship candidate must be accepted to his or her study program at an accredited community college or technical school.
- Sponsoring clubs and their scholarship candidate are required to complete the Scholar's estimated budget expenses (See Section 6) prior to the district

interviews. The maximum District Grant amount is \$5,000.

- In addition, sponsoring clubs will be expected to contribute at least another \$250 towards the student's expenses and can, if they desire, increase this amount to cover project costs.
- If tuition, books, lab fees, other classroom and/or school fees and expenses, certification testing, and tools and equipment do not use up the \$5,250 funding, these funds can be used to complete the humanitarian project.
- The Scholar may NOT be:
 - (1) A Rotarian
 - (2) An employee of a club, district, or other Rotary entity, or of Rotary International
 - (3) The spouse, a lineal descendant (child or grandchild by blood or stepchild legally adopted or not), the spouse of a lineal descendant, or an ancestor (parent or grandparent by blood) of any person in the foregoing two categories.
- The applicant must complete all required reports during and after his or her scholarship time.
- Scholarship candidates must appear in person at the district interviews. If, for any reason, the Scholarship candidate is unable to be interviewed in person on the day of the interviews, he or she will not be eligible to receive a scholarship.

NOTE: These interviews are scheduled to take place on Saturday, April 21, 2018.

Additional Terms and Conditions are outlined Section 9 of this Handbook.

2. Areas of Study

The following areas of study are acceptable for study under a District Grant Vocational Scholarship:

- Agricultural, Food & Natural Resources
 - Agriculture Science
 - Small Animal Management
 - Production Specialist
 - Nursery Science Specialist
- Arts, Audio/Visual Technology and Communications
 - Audio/Visual Systems Technician
 - Broadcast Technician
 - Commercial Artist
 - Graphic Design and Illustration
- Architecture, Construction and Maintenance Technology
 - Construction Management
 - Computer-aided Drafting and Design
 - Renewable Energy (solar/wind) Technology
 - Heating, Ventilation, Air Conditioning, and Refrigeration Trades
 - Plumbing Trades
 - Electrical Trades
 - Carpentry Trades
- Automotive Maintenance
 - Auto Collision Repair
 - Auto Collision & Management Technology
 - Auto Refinishing
 - Automation & Robotics
 - Automotive Parts Specialist
 - Automotive Technology
 - Computerized Controls
- Aviation Maintenance Technology
- Childcare/Early Childhood Education
 - Educational Aide
 - Child Development Specialist

- Law, Public Safety, Corrections and Security
 - Fire Protection/Firefighter
 - Criminal Justice Corrections Specialist
 - Basic Peace Officer
- Funeral Services
- Health Sciences
 - Nursing Assistant
 - Emergency Medical Technician/Paramedic
 - Physician's Assistant
 - Pharmacy Technician
 - At-Risk Youth Specialist
 - Chemical Dependency Specialist
 - Social Worker
- Hotel Management
- Information technology
 - Microsoft and/or Cisco Certification
 - A+ Certification
 - Computer Helpdesk Specialist
 - Internet Webmaster
 - Information Security Management Specialist
 - Geographic Information Systems (GIS) Specialist
- Tourism

3. A Focus on Service Learning

Each vocational scholarship student will be required to complete a humanitarian service project somewhere within the 23 counties that comprise District 5870 during his or her period of study. *This service project must fall within the student's area of study.*

The Scholar will be expected to provide an outline of the project and its anticipated budget during his or her district interview.

The Scholar will be expected to take the initiative to make contacts in the community and to secure funding for the project.

A good service project should:

- Incorporate local Rotary clubs and Rotarians
- Serve a specific population within the community
- Plan for public relations, press releases, and community announcements
- Be documented and photographed
- Plan for funding options or incorporate fund-raising
- Uncover a need within the community based on local feedback and appropriate research
- Be measurable and sustainable
- Reflect an interest of the scholar while meeting a need within the community
- Meet the 4-Way Test of ethical standards

4. Timeline for Selecting a 2018-19 Scholar

July 1, 2017

Clubs then should develop a committee for interviewing and selecting a candidate. Clubs will conduct interviews based on a schedule that fits the needs of the clubs. Clubs must select up to two candidates and notify all candidates of selection at the appropriate time.

September 1, 2017

The scholarship application will be available on the District 5870 website (www.rotarydistrict5870.org) under the Foundation Tab.

March 31, 2018

Clubs must have submitted applications and all required supporting documents to the District Rotary Foundation Committee Chair for scholars wishing to begin study during the 2018-19 Rotary Year. The scholar must have selected the community college or technical school that he or she wants to attend.

April 21, 2018

District interviews will be held for scholars wanting to begin study in 2018-19. If, for any reason, the candidate is unable to be interviewed in person that day he or she will not be eligible to receive a scholarship.

Funding

The Scholarship funding will be disbursed by District 5870 to the sponsoring club in Rotary Year 2018-19 (i.e. not before July 1, 2018) when they are received from The Rotary Foundation.

Commencement of Study

Students can begin study as soon as the funding has been provided to the sponsoring club by District 5870.

5. Sponsoring a District Grant Scholar

Become a Sponsor Counselor & Club

- Discuss the opportunity with your club President and Board.
- Promote the opportunity within your area through a variety of media.
- Begin interviews of potential applicants. ***It is District 5870's expectation that clubs will individually interview and select their candidate(s).*** In the past, a few clubs have distributed applications to a local high school and simply endorsed all those received back from the school without performing an interview.
- Clubs are limited to a maximum of **two scholarship candidates** unless prior approval is obtained from the District Rotary Foundation Chair to submit additional applications. These candidates should be someone who:
 - Possesses excellent leadership skills and potential;
 - Has a proven record of success in his or her vocation;
 - Has demonstrated a personal commitment to community service;
 - Has well-defined and realistic goals that align with the vocation that the student has chosen to study;
 - Has concrete ideas as to how he or she will make use of their new skills after graduation and/or certification;
 - Is sincere about maintaining a lifelong relationship with Rotary after the scholarship period.
- Submit all applications and required supporting documents to the District Scholarship Committee no later than January 31, 2018.
- Appoint a club member to serve as the applicant's Scholarship Counselor.

Roles & Responsibilities of a Sponsor Counselor & Club

Before the district grant application is submitted

- Assist the candidate in completing the scholarship application and preparing for the club and district interviews.
- Identify any relevant application or other deadlines (e.g., community college or technical school deposits) the candidate may have.
- Provide the candidate with a copy of the Terms and Conditions for Rotary Foundation District Grants (see Section 9).
- Assist the candidate in creating a realistic scholarship budget (see Section 6).

After the district grant application is approved and funds are received from The Rotary Foundation

- District 5870 will disburse funds directly to Rotary Club that sponsored the student.
- Your club will decide payment details. Develop and clearly communicate payment requirements and reporting schedules to the student. Provide the student with a copy of the approved budget and clearly communicate expectations about eligible expenses for each line item.
- Once the funds have been transferred to the club, provide these funds to the student based upon the previously established schedule.
- Arrange visits to Rotary club meetings, district functions, and other Rotary-related events.
- Consider supplying the student with an adequate supply of business cards, with the Rotary emblem and their picture.

During the scholarship period

- Maintain regular contact with the student in order to share news with fellow Rotarians and to enable the student to relate news about his or her training.
- Encourage the student to share concerns or problems.
- Help the student complete the required humanitarian service project.
- If the scholarship is longer than 12 months, collect:
 - Interim reports from the student for submission to the District 5870 Scholarship Committee, and
 - Receipts for expenses of \$75 or more required to fulfill the retention and reporting requirements for the District 5870 Audit Committee at the completion of the study period.

After the scholarship

- Help the student arrange speaking engagements at clubs in your district. In addition to giving club members the opportunity to learn about the student's experiences, such events help publicize the Rotary Foundation.
- Ensure that the student submits a final report to you, with applicable receipts.
- Encourage the student's participation in any Rotary Foundation alumni activities available in the district after the completion of study.
- Maintain communication with the student and keep track of his or her current address.

6. Student Expenses Worksheet

Work with your Student to complete the following worksheet. This worksheet is intended to provide your club and the Student with an approximate cost of his or her training. These items may not be all inclusive:

Item	Notes	Approximate Cost
Tuition	Costs vary by community college and technical school, by course hour, and by vocational program.	
Books, lab fees and other classroom and/or school fees and expenses	Work with your student to determine what addition classroom expenses there might be.	
Certification testing fees	Many skills require a certificate before the student can find employment. Fees vary by vocation and level of proficiency	
Tools and equipment	Specialized tools and equipment that the student will need to work after graduation/certification (within reason)	
Project expenses	If tuition, books, lab fees, other classroom and/or school fees and expenses, certification testing, and tools and equipment <u>do not</u> use up the \$5,250 funding.	

What else may be an expense?

7. Sponsoring Club Expenses Worksheet (optional other than Item 1)

Complete the following worksheet and provide to your Club President for reference. This worksheet is intended to provide your club with an approximate cost of sponsoring a student and contains suggested items that a club may want to do for its student.

Item	Notes	Approximate Cost
Club contribution to the scholarship	<i>This item is a requirement for obtaining the Scholarship</i>	\$250
Name tag for scholar	Once selected, it's a nice welcome gift from your club	
Welcome breakfast/lunch/dinner at your club	Cost varies per club and you may invite scholar to many meals	
Student's attendance at District events such as the District Assembly or District Conference.	Please visit www.rotarydistrict5870.org for current events	
Business cards for the student	Available online	
Rotary "theme" pin	Usually free from your DG	
Project expenses	If tuition, books, lab fees, other classroom and/or school fees and expenses, certification testing, and tools and equipment <u>do</u> use up the \$5,250 grant funding	

What else may be an expense?

8. Club Qualification Requirements

Qualification is an annual process and is required for participation in District Grant funded projects and scholarships. To qualify, a club must:

- Sign the District 5870 annotated version of the Club Memorandum of Understanding (MOU) – Tab 9 in the Pre-P.E.T.S. Green Notebook.
- Have at least two persons Grant Management certified, one of whom must be the Rotarian who will serve as Club President in 2018-19.
- Have filed the appropriate Form 990 with the IRS for the Rotary Year ending June 30, 2017.
- Have paid all required Rotary International Fees and Dues, and District Dues as of January 1, 2018.
- Agree to comply with the Conflicts of Interest Policy.
- Agree with the Financial Stewardship Protocol (the club, as an entity, is responsible for the use of grant funds *regardless of who controlled the funds*)
- Agree to participate with audits as and if required.

The Club Memorandum of Understanding (MOU) is an agreement between the club and District 5870 explaining what measures the club will undertake to ensure proper implementation of District Grants and management of Rotary Foundation District Grant funds. By signing this document, the club agrees that it will comply with all Foundation requirements. The MOU requires that the club:

- Appoint a Club Qualification Manager.
- Develop a written succession plan for grant records to ensure document retention requirements are met.
- Develop written plans and policies for:
 - Financial Management
 - Document Retention to ensure that:
 - All grant and qualification related documents are retained for a minimum of five years (or longer if required by applicable law)
 - Documents are stored in a known location that is accessible to both (1) club Rotarians, and (2) TRF or the district upon request

Final note: All participation in Rotary Foundation New Grants Model programs is done on-line through MyRotary at www.rotary.org. This means that all club Scholarship Counselors must have a Member Access userid and password no later than the district interviews.

9. Terms and Conditions for Rotary Foundation District Grants

I. General Criteria

Rotary Foundation District Grants support a wide variety of humanitarian and educational activities in local communities and abroad. All projects and activities such as scholarships funded by these grants must:

1. Support local humanitarian service projects and scholarships that relate to the mission of The Rotary Foundation, and in accordance with Foundation policies.
2. Include the active participation of Rotarians.
3. Exclude any liability to The Rotary Foundation or Rotary International except for the funding amount of the grant.
4. Adhere to all public laws.
5. Only fund activities that have been reviewed and approved before their implementation. Grants will not be approved to reimburse clubs or districts for projects or scholarships already completed or in progress. Planning for grant activities ahead of approval is allowed and encouraged, but expenses may not be incurred before approval.
6. Comply with the Conflict of Interest Policy for Grant Participants as outlined in section 7.030 of The Rotary Foundation Code of Policies.
7. Comply with the policy regarding the proper use of Rotary Marks as outlined in section 1.050.2 of The Rotary Foundation Code of Policies.

II. Sponsor Criteria

For a club to receive a District Grant from District 5870 it must be qualified by the district. In addition, all members of the club's grant committee must be in good standing with Rotary International and The Rotary Foundation. Individuals prohibited from serving on a grant committee include paid staff of a cooperating or beneficiary organization associated with the grant, and any Rotarian also serving on the District Foundation Committee.

III. Eligibility Criteria

In addition to the general criteria for Rotary Foundation District Grants, specific allowable activities have been identified for District Grants projects such as those that the student will be expected to complete as part of his or her scholarship. District Grant funding can be use for:

1. Construction of infrastructure limited to toilet blocks and sanitation systems, access roads, dams, bridges, storage units, fences and security

systems, water/irrigation systems, and greenhouses.

2. Renovation, repair, and refurbishment of structures that are currently occupied or operational in which individuals live, work, or spend a significant amount of time, which may include the provision of new services or upgrade of utilities (i.e., electrical, plumbing, and heating), repair of roofs, additions to existing schools or hospitals, elevators, and renovation of bathrooms.
3. Purchase and distribution of contraceptives for use in disease prevention and maternal health projects.
4. Domestic travel for scholars, project beneficiaries, and those professionals (Rotarian and non-Rotarian) needed to implement the local humanitarian service project.
5. Direct costs, fees, contracted labor costs, stipends, or honorariums related to project implementation.
6. Activities involving vaccines and immunizations that are consistent with the best practices described by the World Health Organization.

IV. Restrictions

District Grants cannot be used to:

1. Unfairly discriminate against any group.
2. Promote a particular political or religious viewpoint.
3. Support purely religious functions at churches and other places of worship.
4. Support activities that involve abortion or that are undertaken solely for sex determination.
5. Fund the purchase of arms or ammunition.
6. Support the following programs of RI: Rotary Youth Exchange, RYLA, Rotary Friendship Exchange, Rotaract, and Interact.
7. Make a new contribution to the Foundation or another Rotary Foundation grant.

V. Timelines and Applications

District Grants function on a two-year business cycle includes a planning year, during which the club first submit a district grant application, and an implementation year, during which the funds can be paid out and applied to projects.

Clubs are strongly encouraged to begin planning district grant projects and to

submit applications during the planning year, but they may also submit applications during the implementation year.

The club grant committee must submit a complete request for district grant funds, preferably during the planning year, which includes:

1. Signed authorization to request and oversee the expenditure of the grant funds.
2. A general spending plan for the year in which the funds will be spent.
3. Agreement to comply with all standard district grant policies, guidelines, and criteria.

Clubs may apply for only two district grants per Rotary year; one to undertake a DAP Grant project, and one to support a vocational scholarship. Any requests for an increase in the grant amount must be made before any portion of the grant has been paid out by the District. District 5870 will not process or approve district grant applications after the end of the Rotary year for which the funds were requested.

VI. Financing and Contributions

District grants are funded solely with allocations made from the District Designated Fund (DDF). At the Governor's discretion, District 5870 may apply for up to 50 percent of its SHARE allocation, which represents 50 percent of the district's annual giving three years prior. District 5870 distributes this DDF to its clubs based upon the club's relative giving to the Annual Fund three years prior.

VII. Payments

District grant funds will be available for payment in the 2016-17 Rotary year, but will not be released until the previous Rotary year's district grant(s) are closed. Funds are not available after the close of the implementation year; if sponsors do not meet all payment requirements by May 15, 2016, the scholarship grant will be canceled.

VIII. Reporting Requirements and Documentation

Grant recipients are responsible for reporting to District 5870 on the use of grant funds. Progress and final reports must be submitted to the Chairperson of the District 5870 Grants Subcommittee. These forms must be completed in their entirety for the report to be accepted. ***New grant applications, including those for scholarships, will not be accepted by District 5870 if the grant sponsor has an overdue report for any Foundation grant.*** Additionally, District 5870 reserves the right to review grants at any time, conduct an audit, send a monitor, require the submission of additional documentation, and suspend any or all payments if deemed necessary.

The following reporting criteria also apply to grant recipients:

1. Unused grant funds must be returned promptly to the District 5870 District Grant 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 projects must return misused grant funds in their entirety and may be barred from receiving future grants for a period of up to five years.
5. Final reports documenting the disbursement of funds must be submitted to District 5870 within 12 months after the payment is received.
6. All grant projects and activities funded by district grants must be completed within 24 months of disbursement by District 5870 to the club.

IX. Non-Rotarian Grant Recipients

Non-Rotarians receiving grant funding, such as scholarship recipients, are expected to demonstrate a good knowledge of Rotary and a solid commitment to participate in activities and service with their sponsors. Non-Rotarian grant recipients are expected to participate in club and district activities as requested by their sponsors.

X. Cooperating Organizations

Cooperating organizations are reputable non-Rotary organizations or academic institutions solicited by the sponsors 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.

All funding provided to cooperating organizations must be used for specific project activities, and the club must maintain an itemized report of such activity.

10. 2018-19 District 5870 Vocational Scholarship Application

As noted in the cover letter to this handbook, District Grant Vocational Scholarships are intended to provide education or training that prepares students for jobs, careers at various levels from a trade to a craft, or a position in engineering, accounting, nursing, medicine and other healing arts, architecture, pharmacy, and law that do not require a college degree to perform.

The training program must be no less than one academic year in length, and no more than two years.

Scholarship candidates must:

- Reside in one of the 23 counties that comprise District 5870;
- Attend a community college or technical school located in one of the 23 counties that comprise District 5870;
- Agree to study one of the areas listed in Section 2 of this handbook;
- Agree to complete a humanitarian service project during his or her period of study;
- Begin his or her academic program during the 2018-19 Rotary Year;
- Agree to work in one of the 23 counties that comprise District 5870 following graduation and/or certification.

Scholarship candidates must appear in person at the district interviews. If, for any reason, the Scholarship candidate is unable to be interviewed in person on the day of the interviews, he or she will not be eligible to receive a scholarship.

NOTE: These interviews are scheduled to take place on Saturday, April 21, 2018.

The District 5870 Scholarship Application will be posted to the District website (www.rotarydistrict5870.org) not later than September 1, 2017 under the Foundation tab.