

Vocational Scholarship Handbook



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District Vocational Scholarship Chair

Dear District 5870 Rotarians,

I'm pleased to announce that District 5870 will be sponsoring Rotary Foundation (TRF) District Grant Vocational Scholarships for the 2020-21 Rotary Year!

Since the nature of these scholarships is left up to each district to determine, 2020/21 District Governor Rick Stacy 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, or are currently enrolled, at a community college or technical school located in one of these 23 counties in District 5870 (or in an adjacent county if that school is closer or a more economical option than a school located in a District 5870 county); and

These scholarships are intended for **vocational education and training** that prepares students for jobs, careers at various levels in engineering, accounting, nursing, medicine and other healing arts, architecture, pharmacy, and law that do not require a 4 year college degree to perform. These scholarships are not intended for students attending a community college or technical school intending to transfer credits earned to a 4-year, upper level college.

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

Clubs must be qualified under TRF and District 5870 guidelines before they can sponsor a scholarship student.

Yours in Rotary Service,

Christine Kempff, District Rotary Foundation Chair, 2018-21

Scholarship POC:

Barbara Merlo, District Vocational Scholarship Chair

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1. General Qualifications and Requirements

Scholarship applications will only be accepted from clubs who are fully qualified to receive Foundation Funds (see Appendix 1 and 2 for details). Clubs with an ***overdue report for any Foundation grant will be ineligible.***

District Grant scholarships are intended to fund vocational education or training at an accredited 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 and lead to a 2-year Associate of Applied Science or shorter-term credit Certificate program.

Eligible degrees and certificates should lead to employability upon completion in the field of study. Broad areas include engineering, technology, business, accounting, allied health (medical), construction and manufacturing trades, and public service that do not require a 4-year college degree to perform. Information on this type of program and a search function may be found at www.TexasGenuine.Org. If a prospective applicant selects a program of study that is not clearly included in the above, please contact the Vocational Scholarship Chair for approval.

Scholarship applications will be scored based on a combination of need, merit, previous work in the area of study (if any), past commitment to service above self and the applicant's career plans.

Students already enrolled in a qualifying program may apply for the scholarship to assist in completing a qualified program of study if the time remaining to completion is no less than one academic year.

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, no preference will be given to students applying for a second scholarship.

Each scholarship recipient will be required to complete a service project (details in section 2) during his or her period of study. The project must be conducted within District 5870 and be related to the student's area of study. Sponsoring clubs are responsible for working with the student to plan the project, for ensuring that the project is completed, and that it adheres to the Terms and Conditions for Rotary Foundation District Grants (See Appendix I and II).

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 at a community or technical college in or adjacent to a District 5870 county;
- Agree to complete a service project during his or her period of study;
- Begin his or her academic program during the 2020-2021 Rotary Year; and
- Complete a District 5870 Vocational Scholarship Application.
- Have a solid commitment to participate in activities and service with their sponsors and learn about Rotary.

No later than the time of the district interviews, the scholarship candidate must:

- Be accepted to his or her program of study at an accredited community college or technical school.
- Provide an estimated budget (See Section 5) not to exceed the maximum District Grant amount of \$5,000.
- Have a project outline prepared with the sponsoring club.

Sponsoring clubs are expected to contribute at least \$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 service project.

The Scholar may NOT be:

- A Rotarian
- An employee of a club, district, or other Rotary entity, or of Rotary International
- 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.

Clubs must ensure that the scholarship recipient provide timely information to complete required final or interim reports. Failure to complete the report will disqualify the club for any Rotary Foundation grant funding, including DAP grants and additional Vocational Scholarship funding. Interim (or final) reports are due no later than June 15, 2021. A link to the reporting form is available on the Vocational

Scholarship webpage.

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, May 16, 2020 at Central Texas College in Killeen.

Additional Terms and Conditions are outlined in Appendix I and II of this Handbook.

2. A Focus on Service Learning

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

The application should include a short description of a proposed project that has been developed with the sponsoring club. The student should be prepared to discuss the project during the in-person interview. A final project plan and/or progress report will be due prior to club release of funds for each term or semester.

The Scholar, with the assistance of the club sponsor, 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 need for 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
- 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

3. Timeline

July 1, 2019

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 may select up to two candidates and notify all candidates of selection at the appropriate time.

January 18, 2020

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

April 30, 2020

Clubs must have submitted applications and all required supporting documents to the District Vocational Scholarship Chair for scholars wishing to begin study during the 2020-21 Rotary Year. The scholar must have selected the program and community college or technical school that he or she wants to attend.

May 16, 2020

District interviews will be held for scholars wanting to begin study in 2020- 2021. 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.

July 1, 2020

Final service project plan due to District Scholarship Sub-Committee Chair

Funding

The Scholarship funding will be disbursed by District 5870 to the sponsoring club in Rotary Year 2020-21 (i.e. not before July 1, 2020) when they are received from The Rotary Foundation, contingent on the club being fully qualified to receive Foundation funding and that all grants from the previous Rotary year have been closed.

Commencement of Study

Students can begin study as soon as the funding has been provided to the sponsoring club by District 5870. Students may begin study and be reimbursed by the club if the term begins prior to receipt of funds for the intended start of the term.

4. Sponsoring a District Grant Scholar

Getting Started

- Promote the opportunity within your area
- Appoint a Vocational Scholarship POC, who will serve as the applicant's scholarship counselor
- Begin interviews of potential applicants.
- Select up to two scholarship candidates. These candidates should have:
 - Excellent leadership skills and potential;
 - A proven record of success in his or her vocation;
 - Demonstrated a personal commitment to community service;
 - Well-defined and realistic goals that align with the vocation that the student has chosen to study;
 - Concrete ideas as to how he or she will make use of their new skills after graduation and/or certification;
 - Potential to become a Rotarian.
- Submit all applications and required supporting documents to the District Scholarship Committee no later than April 30, 2020.

Roles & Responsibilities of a Sponsor Counselor & Club

Before the scholarship 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.
- Ensure that the candidate understands reporting, service and other requirements
- Assist the candidate in creating a realistic scholarship budget and outline for their service project. (see Section 5).

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

- 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 college or 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.
- Provide opportunities for mentorship with club members
- Help the student complete the required service project.
- Keep a detailed record of all expenditures, along with receipts
- Encourage the student to join a college or community Rotaract Club, if available.
- At the conclusion of the academic year, but no later than June 15, 2021, provide a final report using the format linked from the District Vocational Scholarship webpage.
- If the scholarship is longer than 12 months, or the term extends past the deadline, provide:
 - An interim report to the District 5870 Scholarship Committee on or before June 15, 2021, 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.
- In the event that the student is unable to complete their program, all remaining funds will be returned to District 5870.

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.
- Work with the student to submit 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.
- Actively seek their involvement in appropriate club activities and refer them to clubs that meet their need if available.

5. 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, residency determination and 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?

ADDENDUM I. 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 2020-21.
- Have filed the appropriate Form 990 with the IRS for the Rotary Year ending June 30, 2019.
- Have paid all required Rotary International Fees and Dues, and District Dues as of January 1, 2020.
- 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 and 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: Participation in Rotary Foundation Grants 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.

ADDENDUM II

Terms and Conditions for Rotary Foundation District Grants

The District 5870 Vocational Scholarship program is a District Grant, and must comply with the criteria below

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:

- Support local humanitarian service projects and scholarships that relate to the mission of The Rotary Foundation, and in accordance with Foundation policies.
- Include the active participation of Rotarians.
- Exclude any liability to The Rotary Foundation or Rotary International except for the funding amount of the grant.
- Adhere to all public laws.
- 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.
- Comply with the Conflict of Interest Policy for Grant Participants as outlined in section 7.030 of The Rotary Foundation Code of Policies.
- 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.

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:

- 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.
- 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.
- Purchase and distribution of contraceptives for use in disease prevention and maternal health projects.
- Domestic travel for scholars, project beneficiaries, and those professionals (Rotarian and non-Rotarian) needed to implement the local humanitarian service project.
- Direct costs, fees, contracted labor costs, stipends, or honorariums related to project implementation.
- 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:

- Unfairly discriminate against any group.
- Promote a particular political or religious viewpoint.
- Support purely religious functions at churches and other places of worship.
- Support activities that involve abortion or that are undertaken solely for sex determination.
- Fund the purchase of arms or ammunition.
- Support the following programs of RI: Rotary Youth Exchange, RYLA, Rotary Friendship Exchange, Rotaract, and Interact.
- 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:

- Signed authorization to request and oversee the expenditure of the grant funds.
- A general spending plan for the year in which the funds will be spent.
- 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 2020-21 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 July 1, 2020, 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:

- Unused grant funds must be returned promptly to the District 5870 District Grant Account.
- Districts must report the use of grant funds to their member clubs in accordance with the terms of qualification.
- 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.
- 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.
- Final reports documenting the disbursement of funds must be submitted to District 5870 within 12 months after the payment is received.
- 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.