



The  
**Rotary**  
Foundation



## **The Rotary Foundation (TRF) - Humanitarian Grants Program**

**District Grants 2018 - 2019 - District 9520 Guidelines**

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# The Rotary Foundation (TRF) District 9520 - District Grants 2018-2019

## Guidelines

The following information is provided to assist Clubs and the District in applying for District Grants to undertake local or international projects.

The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training teams. Here's an overview:

- **Global grants** support large international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus. They range from \$15,000 to \$200,000.
- **District grants** fund smaller-scale, short-term projects that address immediate needs in your community or abroad.
- **Packaged grants** fund up to 10 scholarships each year for students in a master's program on water and sanitation at the UNESCO-IHE Institute for Water Education in Delft, Netherlands.

The Rotary website has considerable information and e-learning modules on each of these grants. For more information please visit <http://www.rotary.org/en/grants>. *The guidelines in this document apply specifically to District Grants for District 9520.*

### **District Grants (DGs) - overview**

The District has access up to 50% of the DDF (District Designated Funds) for District Grant projects. These are the funds donated by Clubs to the Annual Programs Fund, 3 years earlier. As in the past, the District manages and allocates these funds to support District and Club sponsored projects providing they comply with the Terms and Conditions for Rotary Foundation's District Grants. Applications for District Grants are made to the District 9520 Foundation Grants Committee (see below).

District Grants fund smaller, short-term activities that address humanitarian needs in both local and international communities. There are new Grant Terms and Conditions to comply with, broader project options, new timelines and additional funds to assist Clubs and the District.

Clubs and the District can apply for District grants to fund a variety of local and international activities, for example:

- *Humanitarian service projects, including disaster recovery efforts*
- *Scholarships for any level of study (primary, secondary, vocational, tertiary), at any location, or area of study, including peace type scholarships*
- *Vocational training team visits (VTT) to or from D9520 and/or GSE type team visits.*

To be eligible for a Foundation District Grant, a Club and the District must comply with TRF Terms and Conditions for District Grants, and the guidelines established by District 9520 regarding application for grants, allocation of the Foundation funds (DDF), completion of projects and reporting on the expenditure of the grant funds.

For more information, visit the website below or contact the TRF Committee at [districtgrants.rotary9520@gmail.com](mailto:districtgrants.rotary9520@gmail.com)

### **District Foundation Grants Committee for 2018 - 2019 is:**

DG Kim Harvey District Governor	PDG Jerry Casburn District Rotary Foundation Chair Tel: 0407 646 396	Helen Charles Grants Subcommittee	Carola Sanders Treasurer
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## District Grants processes – eligibility, applications and funding

### **1. Eligibility - for grant funding**

- 1.1 All Clubs must be qualified to receive a District Grant. To qualify for a District Grant, Clubs must submit annually, a completed Memorandum of Understanding (MOU) signed by the President (2018-2019) and one other Club official.
- 1.2 A Club must have entered goals for both The Rotary Foundation and End Polio Now giving in Rotary Club Central for the 2018-2019 year.
- 1.3 Applicants may apply for a grant for humanitarian service projects, scholarships or vocational training team visits.
- 1.4 The projects must meet and comply with The Rotary Foundation's Terms and Conditions for District Grants and any other applicable Terms and Conditions e.g. Vocational Training Team and Scholarships.
- 1.5 By submitting an application, all applicants agree to comply with the timelines established by the District Grants Committee for due date of project proposals (applications), project commencement, project completion and final reporting (including submitting of receipts) as listed below.
- 1.6 Where an applicant does not complete the project or does not submit the final report by the due date, the District Grant monies must be returned to the District within 2 weeks of the initial project completion date.

### **2. Applications - project proposal & project completion**

- 2.1 Applicants are required to submit a *project proposal* to the District Grants subcommittee, **by 31 July 2018**.
- 2.2 The District Governor, with the support of the District Management Committee, may apply for a District Grant on behalf of the District.
- 2.3 The project proposal should be no more than 1-2 pages, and it must provide:
  - a. Description of the project: what is it, who will benefit, where will the project take place.
  - b. Detailed budget: identify expenditure items of the project.
  - c. Rotarian and non-Rotarian involvement: significant involvement of Rotarians is expected.
  - d. District Grant funding sought: how much is sought from the District?
  - e. Contact person's details: the person who will submit final reports and receipts to the District.
  - f. Confirm that a completed MOU has been submitted or submit it with the grant project proposal.
  - g. Confirm that the project will be started by December 2018 and that it will be completed by 30 April 2019, except for scholarships and disaster recovery projects.
  - h. If the grant is for scholarship or vocational training team projects, the applicant must provide details as per the applicable grant terms and conditions.
- 2.4 The project proposal must be forwarded to the District Grants Committee via (i.e. cc) the club President.
- 2.5 Applicants must submit a final report with copies of the receipts to the District, following the completion of the sponsored part of the project.

### **3. Funding - approval, payments, Club contributions**

- 3.1 The grants will be approved by the District Foundation Grants Committee: District Rotary Foundation Committee Chair, the Grants Committee Chair, the District Grant Coordinator and the District Governor.
- 3.2 The grant funds will be paid to the Applicants at the commencement of the project.
- 3.3 Funding will not be approved where a Club has an outstanding report due for an existing Foundation project.
- 3.4 In general clubs are expected to meet at least 50% of the total cost of the proposed project. A lesser amount may be offered, if there are not enough funds available.
- 3.5 In the event of insufficient funds being available to support all applications the following criteria, in no particular order, will be considered when selecting successful applications:
  - a. The number and nature of previous District Grants awarded to the Club
  - b. Whether the project meets the Foundation's Six Areas of Focus

- c. The Club's support of the Foundation and its programs
- d. Sustainability of the project.

## D9520 District Grants – Timeline for 2018 - 2019

<b>Date</b>	<b>Task</b>	<b>Action by whom</b>	<b>Comments</b>
<b>April 2018</b>	District Grant project proposals sought from Clubs and the District.	Grants Committee advertises for Clubs and the District to submit project proposals.  Application details will be promoted at District Assembly by DRFC.	- District Grant Chair to assist Clubs where possible.
<b>30 June 2018</b>	Both the District and Clubs submit completed MOUs for the <b>new Rotary year.</b>	1. District MOU is completed by DGE and DRFC (District Rotary Foundation Chair) and is submitted to TRF grant coordinator on line. 2. Clubs submit completed MOU's to DRFC.	- DRFC to keep copies of all MOUs
<b>31 July 2018</b>	Due date to submit project proposal to the District.	Applicants (Club and/or District) submit project proposal to District Grants Coordinator, at <a href="mailto:districtgrants.rotary9520@gmail.com">districtgrants.rotary9520@gmail.com</a>	- DGC Compile a summary of projects. - Grants Committee will assess eligibility of the projects against TRF District Grant terms and conditions and any other relevant grant terms and conditions.
<b>August 2018</b>	Submit District Grant Spending Plan to TRF, online.	Grants Chair / DRFC submit a District Grant Spending Plan to TRF on line and seek approval & funding for the projects. The application for funding can identify: 1. Summary of proposed District Grant projects with funding needed for each project. 2. Total District Grant amount sought. 3. Allocation of up to 20% of DDF for unexpected project costs (e.g. disaster recovery) and 3% for administrative costs.	- Only one application allowed per year - Online process managed by Foundation Chair. - Unexpected cost can be used for disaster recovery. - Unused DDF return to Global Grants, DDF bucket for 2017 - 18.
<b>August – September 2018</b>	District receives funding and approval of the District Grant spending plan.	1. TRF provides a grant based on the Spending Plan submitted. 2. Grants Committee informs the successful Clubs to commence the project. The Clubs receive payment upon receipt of the funds from the Rotary Foundation.	- Clubs will receive funding and keep a separate ledger line within the club's accounts.
<b>30 April 2019</b>	Project Report	1. Applicants (Clubs / District) submit project completion report (except for scholarships and disaster recovery) to the District, including the receipts. 2. Unspent funds return to TRF.	- District keeps copies of the receipts & completed project reports. Clubs keep the original receipts and a copy of the report.
<b>30 June 2019</b>	District to submit final Report to TRF (i.e. disbursement of funds)	District Grants Chair / DRFC submit final report (on disbursement of funds) to TRF using the same format as per the District Grants Spending Plan, noting any changes to DG Spending Plan.	- The final report within 12months of payment. Projects need not be completed, just funds spent.
<b>Aug 2019 - 2020</b>	Project Completion.	Applicants complete all projects within 2 years of receipt of funds.	All District Grant projects must be completed within 2 years.



## INVITATION – District Grant applications 2018-2019

To Clubs and the District Representatives,

You are invited to submit an application (project proposal) for a District Grant for 2018-2019 Rotary year.

Clubs and the District can apply for a broad range of projects, including:

- *Humanitarian service projects, including disaster recovery efforts,*
- *Scholarships (primary, secondary, vocational, tertiary) in any location, area of study, including peace type scholarship,*
- *Vocational training team (VTT) visits to and from D9520*

**Due date for applications: 31 July 2018.**

**Amount available:** up to \$2,000 (humanitarian service projects & school scholarships) can be requested but larger amounts may be available for more complex projects and scholarships.

### How to Apply:

**Step 1:** Read Grants Terms and Conditions for District Grants (in particular, see under Eligibility, Restrictions) - ask for or visit at <https://www.rotary.org/myrotary/en/document/terms-and-conditions-rotary-foundation-district-grants-and-global-grants-grants-awarded> Alternatively, see Appendix 2, below for extracted sections. If you are applying for scholarships and Vocational Training Team (VTT) projects, please read applicable Terms and Condition in addition to the above.

**Step 2: Project Proposal + checklist** – in no more than 1-2 pages, the application must provide information on:

- 1) Description of the project – what is it, who will benefit, where will the project take place?
- 2) Detailed budget – what would you buy with the grant monies (i.e. separate to spending Club/other funds)?
- 3) Rotarian involvement - e.g. what would they do? Rotarians involvement is expected.
- 4) Grant funding sought - how much is sought? (Clubs/external organisations is expected to contribute 50%)
- 5) Contact person's details – Who will submit the final reports & receipts to the District.
- 6) Confirm that a completed Club MOU has been submitted or is included with this project proposal.
- 7) Confirm that the project will be started by December 2018 and that it will completed by 30<sup>th</sup> April 2019 (for humanitarian service project).
- 8) Applications for tertiary scholarships, vocational training team & GSE type team projects - please provide details as per the applicable TRF grant terms and conditions and confirm that the date of project completion.
- 9) **Please Note:** Project proposals from Clubs which currently have District Grant funds will not be considered for funds unless the final report for the existing project is submitted by 31 July 2018.

### Step 3: Submitting process

Please email the application (project proposal) to the committee at [districtgrants.rotary9520@gmail.com](mailto:districtgrants.rotary9520@gmail.com)

*The project proposal must be emailed via the Club President (i.e. cc Club President).*

Note: Clubs are required to submit final report following completion of your project. Photos would be appreciated.

Please contact the committee members if you want more information or help with your application.

## Terms & Conditions for Rotary Foundation District Grants (selected headings only)

Below is an extract of applicable sections for District Grants from Terms and Conditions for District Grants and Global Grants (post July 2013). If the information below does not help you to determine eligibility of your project, please read other relevant Terms and Conditions (e.g. for VTT and Scholarships) and the full Terms & Conditions for District Grants outlined in [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#) which can be located on the Rotary International Grants Web Page at [https://grants.rotary.org/s\\_main.jsp?lang=1](https://grants.rotary.org/s_main.jsp?lang=1)

1. **Eligibility Guidelines** (*Terms and Conditions for District Grants and Global Grants, heading II, pg1*)
  - 1) Includes active participation of Rotarians
  - 2) Only fund activities that have been reviewed and approved by TRF before their implementation. Grants may not be used to reimburse clubs or districts for activities and expenses already completed or in progress.
  - 3) Demonstrate sensitivity to the host area's tradition and culture
  - 4) Comply with the Conflict of Interest Policy for Grant Participants as outlined in section 7.030 of The Rotary Foundation Code of Policies
  
2. **Restrictions** (*most important - Terms Conditions for District Grants & Global Grants, heading III, pages 3-4*)
 

Grants cannot be used to unfairly discriminate against any group; promote a particular political or religious viewpoint; support purely religious functions; support activities that involve abortion or that are undertaken solely for sex determination; fund the purchase of arms or ammunition; or serve as a new contribution to the Foundation or another Rotary Foundation grant.

  - a. In addition, grants **cannot fund**:
    - 1) Continuous or excessive support of any one beneficiary, entity, or community.
    - 2) Establishment of a foundation, permanent trust, or long-term interest-bearing account. Grant funds can be used to establish a microcredit fund if the sponsors comply with the certain requirements.
    - 3) Purchase of land or buildings.
    - 4) Fundraising activities
    - 5) Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities
    - 6) Public relations initiatives unless they are essential to project implementation
    - 7) Project signage in excess of \$500
    - 8) Operating, administrative, or indirect program expenses of another organization, with the exception of expenses allowed within the project management allocation for global grants
    - 9) Unrestricted cash donations to a beneficiary or cooperating organization
    - 10) Travel for staff of a cooperating organization involved in a humanitarian project
    - 11) Global grant humanitarian projects that consist solely of individual travel expenses
    - 12) Activities and expenses already in progress or completed
    - 13) Transportation of vaccines by hand over national borders
    - 14) Travel to National Immunization Days (NIDs)
  
3. **Other relevant headings:**
  - 3.1 Projects involving Cooperating Organisations (pg 9) - funding for specific project expenses only
  - 3.2 Travel Policies (pg 6-8)

## D9520 - District Grant – Individual Project Final Report 2018 - 2019

Please complete this report, once your project is completed or the District Grant funds are spent.

### 1. Applicant details:

Name of the Club	Tick, if District Project
Project title	

### 2. Project Description

- 1) Describe the project - what was done, when, and where did project activities take place?
- 2) Who benefitted from this project and how did it benefit the community / individual?
- 3) How many people benefited from this project?
- 4) What humanitarian need was met through this project?
- 5) How many Rotarians participated in the project and what did they do (excluding providing financial benefit)?
- 6) If a cooperating organization was involved, what was its role?

### 3. Financial Report: complete once all grant funds are spent

<i>Sources of Income</i>	<i>Currency</i>	<i>Amount</i>
<i>1. District Grant funds</i>		
<i>2. Rotary Club</i>		
<b>Total Project Income</b>		

<i>Expenditures (please be specific and add lines as needed)</i>	<i>Currency</i>	<i>Amount</i>
<b>Total Project Expenditures</b>		

### 4. Receipts: please confirm, that copies of the receipts for the *grant sponsored* expenses are attached

### 5. Certifying Signature

By signing this report, I confirm that to the best of my knowledge these District Grant funds were spent only for eligible items in accordance with TRF approved Terms and Conditions for District Grants and D9520 guidelines for District Grants, and that all of the information contained herein is true and accurate.

Certifying Signature \_\_\_\_\_

Date: \_\_\_\_\_

Print name, Rotary title, and club \_\_\_\_\_