DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL
C – FOUNDATION GRANTS - GENERAL

The Rotary Foundation offers only two types of grants: Rotary Foundation District Grants and Rotary Foundation Global Grants. Together, these grants allow clubs and districts to carry out a broad spectrum of humanitarian and educational efforts, both locally and abroad.

DISTRICT GRANTS

Rotary Foundation District Grants are block grants made to districts to support activities that fit within the Foundation's mission. Districts can use these grants to fund scholarships, support vocational teams, sponsor volunteer service, provide disaster recovery assistance, and carry out community and international service projects. District grants allow flexibility to Rotarians in carrying out grant activities and are fully funded through District Designated Funds.

GLOBAL GRANTS

Rotary Foundation Global Grants support larger projects with sustainable, high-impact outcomes within the six areas of:

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

Clubs and districts can either create their own global grant projects or sponsor packaged grants developed by The Rotary Foundation in collaboration with strategic partners.

Club and district developed grants will receive a funding match from the Foundation. Packaged grants will be fully funded by the Foundation. The minimum total project cost for each global grant is US$30,000.

Rotarians can develop a variety of global grant activities that may take the shape of a humanitarian project, a scholarship, a vocational training team, or any combination of these activities:

- Humanitarian projects supporting the goals of the areas of focus will produce measurable outcomes that will benefit the targeted community long after grant funds have been expended. In addition, the community, as well as the sponsoring clubs and districts, will be actively involved in all stages of the project.
- Scholarships will support international, graduate-level study for a term of one to four years. The scholar's academic and professional goals must further the goals of their selected area(s) of focus.
- Vocational training teams will either provide or receive training within the areas of focus. Team size and composition, as well as professional background, are variable; however, each participant's career goals must be linked to the area(s) of focus.

DISTRICTS AND CLUBS MUST BE QUALIFIED TO APPLY

District 5830 and individual Rotary club' in the district must be "qualified" before they can apply for any Rotary Foundation grants. Qualification ensures that the district and clubs have the appropriate financial and stewardship controls in place for meeting Foundation requirements and successfully managing Rotary Foundation District and Global Grants.

Completing the qualification process and having these controls in place will

- Prepare districts and clubs for increased grant management responsibility
- Improve oversight of grant funds
- Allow for simplified, user-friendly application, payment, and reporting processes
- Provide districts and their clubs with the resources needed to meet Foundation requirements and successfully participate in grant activities

District qualification requires the following:

- 2015-16 district governor, 2016-17 district governor, and the 2016-17 DRFC chair must complete the online qualification process by providing basic information to the Foundation.
- 2015-16 district governor, 2016-17 district governor, and the 2016-17 DRFC chair must agree to the terms of qualification by signing the memorandum of understanding (MOU).
- After completing these steps and becoming qualified, the district must
    o Implement the memorandum of understanding (MOU) and adhere to the terms of qualification.
    o Manage the qualification of Rotary clubs in the district.
    o Have the new district governor-elect, for each year subsequent year, agree to the terms of the MOU and submit his or her authorization online.

Club qualification requires the following:

- The 2016-17 club president and the 2016-17 club Foundation Committee chair or a designated club representative must attend a district Rotary Foundation grant management seminar.
- The 2015-16 club president and 2016-17 club president and 2016-17 club Foundation Committee chair must read, sign, and submit the club memorandum of understanding (club MOU) to their district documenting the assertions included in the memorandum and agreeing to follow its requirements.
- The club is current with its Rotary International and District 5830 dues.
- The club is a "tax exempt organization" and is current in its filings with the Internal Revenue Service.
- The club and/or its club members made contributions to the Annual Program Fund during the 2013-14 Rotary year.

GLOBAL GRANT PROJECTS MUST BE NEEDED AND SUSTAINABLE

When developing activities, clubs and districts should consider the following:

- Activities must be sustainable and measurable. For example:

    o How will a project benefit the selected community in the future, after the grant has been spent?
    o How will a scholar's studies support one or more of the areas of focus?
    o How will a vocational training team project support capacity building, either for the team

or the benefiting community?

- Activities should stem from real community needs. Community needs assessment tools are available to help identify community needs.

GLOBAL GRANT PROJECTS NEED TO BE SPONSORED BY CLUBS

- Global grants must be sponsored by two Rotary clubs or districts: a host partner in the country where the activity takes place and an international partner outside the country.
- Both partners must be actively involved in the planning and implementing of all global grants. This includes maintaining communication and developing plans for the shared responsibilities in all of the grant's stages.
- Clubs will sponsor all global grant applications originating in the district. If approved, the sponsoring club will be responsible for all administrative duties supporting the grant. This will include the following:

  o Supervising the project activity to completion.
  o Managing the grant funds.
  o Reporting on grant progress to the district or the Rotary Foundation.
  o Documenting all project activities and maintaining documentation records for a minimum of 7 years after the project is completed.

TRF POLICIES AND PROCEDURES

Global grants include funding from the World Fund of the Rotary Foundation. As a result, the Rotary Foundation demands greater control over the qualification requirements, the application process and forms, and the grant management and reporting requirements.

The descriptions of these requirements for Rotary year 2016-17 are listed below and shown in the next pages of this section.

TRF – Areas of Focus Policy Statements
TRF – Terms and Conditions for Rotary Foundation District Grants and Global Grants

TRF FORMS AND INSTRUCTIONS

The Rotary Foundation and District 5830 forms and instructions to be used for Rotary year 2016-17 are listed below and shown in the next pages of this section.

None

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL
2016-17 CLUB MEMORANDUM OF UNDERSTANDING

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds
8. Additional Requirements of District 5830

1. Club Qualification

To participate in Rotary Foundation global and packaged grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF) and to send at least one club member to the district's grant management seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in Rotary Foundation district grants. By completing these requirements, the club becomes qualified and eligible to participate in the TRF grant program.

A. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.
B. To maintain qualified status, the club must comply with this MOU, any additional district requirements, and all applicable TRF policies.
C. The club is responsible for the use of funds for club-sponsored grants, regardless of who controls the funds.
D. Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes.
E. The club must cooperate with any financial, grant, or operational audits.

2. Club Officer Responsibilities

The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants.

Club officer responsibilities include:
A. Appointing at least one club member to implement, manage, and maintain club qualification
B. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices
C. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest.

3. Financial Management Plan

The club must have a written financial management plan to provide consistent administration of grant funds.

The financial management plan must include procedures to
A. Maintain a standard set of accounts, which includes a complete record of all receipts and disbursements of grant funds
B. Disburse grant funds, as appropriate
C. Maintain segregation of duties for handling funds
D. Establish an inventory system for equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities
E. Ensure that all grant activities, including the conversion of funds, comply with local law

4. Bank Account Requirements
In order to receive grant funds, the club must have a dedicated bank account that is used solely for receiving and disbursing TRF grant funds.

A. The club bank account must
   1. Have a minimum of two Rotarian signatories from the club for disbursements
   2. Be a low- or noninterest-bearing account
B. Any interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.
C. A separate account should be opened for each club-sponsored grant, and the name of the account should clearly identify its use for grant funds.
D. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.
E. Bank statements must be available to support receipt and use of TRF grant funds.
F. The club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.

5. Report on Use of Grant Funds
The club must adhere to all TRF reporting requirements. Grant reporting is a key aspect of grant management and stewardship, as it informs TRF of the grant's progress and how funds are spent.

6. Document Retention
The club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification and TRF grants. Retaining these documents supports transparency in grant management and assists in the preparation for audits or financial assessments.

A. Documents that must be maintained include, but are not limited to:
   1. Bank information, including copies of past statements
   2. Club qualification documents including a copy of the signed club MOU
   3. Documented plans and procedures, including:
      a. Financial management plan
      b. Procedure for storing documents and archives
      c. Succession plan for bank account signatories and retention of information and documentation
   4. Information related to grants, including receipts and invoices for all purchases
B. Club records must be accessible and available to Rotarians in the club and at the request of the district.
C. Documents must be maintained for a minimum of seven years, or longer if required by local law.

7. Reporting Misuse of Grant Funds
The club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the club that does not tolerate the misuse of grant funds.

8. Additional Requirements of District 5830

The Rotary Foundation authorizes Rotary Districts to add additional requirements to the standard MOU. District 5830 has added the following requirements.

Club officer responsibilities include:

A. The 2016-17 club president and the 2016-17 club Foundation Committee chair or a designated club representative must attend a district Rotary Foundation grant management seminar.

B. The 2015-16 and 2016-17 club presidents and the 2016-17 club Foundation Committee chair must read, sign and submit this MOU to the District Rotary Foundation Committee documenting the assertions included in the MOU and agreeing to its requirements including the following district requirements.

C. The club is current with its Rotary International and District 5830 dues.

D. The club is a "tax exempt organization" and is current in its filings with the Internal Revenue Service.

E. The club and/or its members made contributions to the Annual Program Fund during the 2012-13 Rotary year.

Authorization and Agreement

This memorandum of understanding is an agreement between the club and the district and acknowledges that the club will undertake measures to ensure the proper implementation of grant activities and proper management of Foundation grant funds. By authorizing this document, the club agrees to comply with all of the conditions and requirements of the MOU.

On behalf of the Rotary Club of _____, the undersigned agree to comply with all of the conditions and requirements of the MOU for Rotary year 2016-17 and will notify Rotary International District 5830 of any changes or revisions to club policies and procedures related to these requirements.

2015-16 Club President	
Term	
Name	
Signature	
Date	

2016-17 Club President	
Term	
Name	
Signature	
Date	

2016-17 Club Foundation Committee Chair	
Term	
Name	
Signature	
Date	

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL

2016-17 - CLUB MOU - DOCUMENTATION GUIDE
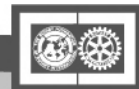
Some suggestions for documenting the assertions made in the 2016-17 Club Memorandum of Understanding are presented below.

MOU Section	Documentation Possibilities
1. Club Qualification	• No documentation required.
2. Club Leadership Responsibilities • Item A. • Item B. • Item C.	• Document with bylaws. o Update Article 8 o Update Article 4, Sec. 8 o Update Article 4, Sec. 8
3. Financial Management • Item A. • Item B. • Item C. • Item D. • Item E.	• Document with bylaws. o Update Article 12, Sec. 9 o Update Article 12, Sec. 7 o Update Article 12, Sec. 7 o Update Article 12, Sec. 8 o Update Article 4, Sec. 8
4. Bank Account Requirements • Item A. • Item B. • Item C. • Item D. • Item E. • Item F.	• Document with bylaws. o Update Article 12, Sec. 7 o Update Article 12, Sec. 7 o Update Article 12, Sec. 7 o Update Article 12, Sec. 7 o Update Article 12, Sec. 8 o Update Article 12, Sec. 8
5. Report on Use of Grant Funds	• No documentation required.
6. Document Retention • Item A. • Item B. • Item C.	• Document with bylaws. o Describe documentation retention plan. o Update Article 4, Sec. 6 o Update Article 4, Sec. 6
7. Reporting of Use of Grant Funds	• Document with bylaws. Update Article 4, Sec. 4
8. Additional Requirements of District 5830 • Item A. • Item B. • Item C. • Item D. • Item E.	• Document in following ways o "Certificate of Qualification Training" copies o This document. o District will confirm and document. o Copy of most current IRS Form 990 filing. o District will confirm and document.

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL

CLUB MOU - SUGGESTED BYLAWS AMENDMENTS

Some suggestions for amending the Recommended Rotary Club Bylaws to provide for the offices and responsibilities of club officers relative to The Rotary Foundation and Rotary District 5830 terms and conditions for participating in The Rotary Foundation grant programs beginning in 2016-17 are presented below.

Article 4   Duties of the Board

Section 1 - *President*. The president shall preside at club and Board meetings.
Section 2 - *Immediate Past President*. The immediate past president shall serve as a director.
Section 3 - President-elect. The president-elect shall prepare for their year in office and serve as a director.
Section 4 - *Vice President*. The vice president shall preside at club and Board meetings in the absence of the president. It shall also be the duty of the vice-president to receive and investigate reports of any potential and real misuses or mismanagement of any club or grant funds. If such reports involve Rotary Foundation grant funds they must be reported to the district Rotary Foundation chair. *(In this example the vice-president has been assigned these responsibilities. But, a club could assign these responsibilities to any existing officer or create a new officer position (i.e. Compliance Officer, Complaints Resolution Officer, etc.) to be solely responsible for these responsibilities. Whichever is the case, it should be delineated in the bylaws of the club.)*
Section 5 - *Director*. A director shall attend club and Board meetings.
Section 6 - *Secretary*. The secretary shall keep membership and attendance records. It shall also be the duty of the secretary at the conclusion of each year to collect and archive for a minimum of seven years all important documents generated by club officers and committees. Such files will be immediately transferred to any successor secretary. All club records shall be accessible and available to Rotarians in the club or at the request of the District, Rotary International or the Rotary Foundation. *(In this example the secretary has been assigned these responsibilities. But, a club could assign these responsibilities to any existing officer or create a new officer position (i.e. Historian, Archivist, etc.) to be solely responsible for these responsibilities. Whichever is the case, it should be delineated in the bylaws of the club.)*
Section 7 - *Treasurer*. The treasurer shall oversee all funds and provide annual accounting of these funds.
Section 8 - *Officers in general.* Board members may perform additional duties as assigned. The duties of all officers shall include ensuring that all activities of the club or its members avoid any actual or perceived conflicts of interest, adhere to high standards of stewardship and proper management and comply with local laws.

Article 8   Committees

Section 1 - Club committees coordinate their efforts in order to achieve the club's annual and long-range goals. Each club should have the following committees:
- Club Administration
- Membership
- Public Relations

- Rotary Foundation
- Service Projects

Section 2 - Additional committees may be appointed as needed.

Section 3 - The president shall be ex officio a member of all committees and, as such, shall have all the privileges of membership.

Section 4 - Except where special authority is given by the Board, committees shall not take action until a report has been made and approved by the Board. The president or the Board shall refer additional business to a specific committee as needed.

Section 5 - Each chair shall be responsible for regular meetings and activities of the committee, shall supervise and coordinate the work of the committee, and shall report to the Board on all committee activities.

Section 6 - It shall be the specific responsibility of the Foundation Committee chair to implement, manage, and maintain club qualification to receive and manage Rotary Foundation grant funds and ensure the club adheres to all Rotary Foundation grant reporting requirements. *(The Foundation Committee is a required club committee under the new Rotary Foundation grant system. Its responsibilities cover all aspects of the clubs' fundraising and grants activities that involve the Rotary Foundation. The Foundation Committee serves to identify and apply for grants that help fund service projects developed by the Club Service, Vocational Service, Community Service or International Service committees.)*

Article 12 Finances

Section 1 - Prior to each fiscal year, the Board shall prepare an annual budget of estimated income and expenditures.

Section 2 - The treasurer shall deposit club funds in financial institution(s) designated by the Board, divided into two parts: club operations and service projects.

Section 3 - Bills are paid by the treasurer or another authorized officer when approved by two other officers or directors.

Section 4 - A thorough annual review of all financial transactions shall be completed by a qualified person.

Section 5 - An annual financial statement of the club shall be provided to club members.

Section 6 - The fiscal year is from 1 July to 30 June.

Section 7 - The treasurer shall deposit all Rotary Foundation grant funds in a bank, named by the board. Such bank account will be separate from the club funds, low- or noninterest-bearing, and be titled as the "Rotary Club of _____ Grants Fund". The president, treasurer and Rotary Foundation chair are authorized signatories on the grants fund bank account. Disbursements from the grants fund bank account require the signature of any two of the three authorized signatories. Any interest earned on the grants account must be used for eligible, approved grant activities or returned to the Rotary Foundation. Grant funds may never be deposited in any investment accounts.
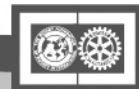
Section 8 - Each June the treasurer shall obtain the appropriate signatory change forms from the bank to transfer signature authority to the new officers on all bank accounts. The completed form must be effective on July 1 and be returned to the bank no later than July 1. If there are any changes of the signatory officers during the year the remaining signatory officers must immediately obtain the appropriate signatures change form from the bank, complete the form and return it to the bank.

Section 9 - The treasurer shall maintain a standard set of accounts utilizing QuickBooks software. The accounting system will contain all of the transactions of all funds maintained by the club upon which a monthly set of financial statements by fund will be generated and presented to the board.

Section 10 - The treasurer shall prepare any required annual state and federal tax reports, ensuring they a signed by the president and filed with the appropriate authority by the required due date. Copies of all tax reports shall be presented to the board.

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL

2016-17 CLUB QUALIFICATION CHECKLIST

Rotary International District 5830 requires that any club in the district that wishes to participate in Rotary Foundation grant activities of District 5830 or the Rotary Foundation be qualified. This checklist of the steps necessary to complete the qualification process for the 2016-17 Rotary year can be used to ensure timely completion of the process.

Step	Explanation
☐ **1.** Your Rotary club must have made contributions to the Annual Fund during the 2013-14 Rotary year.	If your club did not make Annual Fund contributions three years ago your club cannot qualify. You may proceed with the qualification process to gain a deeper understanding of the process but you will not be qualified for 2016-17.
☐ **2.** Your 2016-17 Club President and Foundation Chair must attend a District 5830 presented "Club Qualification Training" seminar.	Each will be required to sign a record of attendance including time in and out. To get credit the participant must be in attendance for the entire session. After both officers have completed training a Club Qualification Training Certificate of Attendance will be sent to the club.
☐ **3.** Your 2015-16 Club President and your 2016-17 Club President and Foundation Chair must sign the Club Memorandum of Understanding (MOU). *See related deadlines below!*	The signed club MOU **including the documentation required in the next step** must be mailed or emailed to the 2016-17 District 5830 Rotary Foundation Committee at Carroll Greenwaldt Chair, District 5830 Rotary Foundation Committee 345 Betty Jo Drive Longview, TX 75605 wgrnwldt@eastman.com 903-235-6448
☐ **4.** The signed MOU must be accompanied by documentation supporting the assertions in the MOU.	**The documentation must include:** • Amended club bylaws or a policies and procedures manual addressing the various additional duties of club officers in respect to the Rotary Foundations new grant system. • Copy of the club's document retention plan. • Copy of IRS Form 990, 990EZ of 990-N for tax year ending June 30, 2015.
☐ **5.** Applications for 2016-17 Global Scholarship Grants	**The deadline for presentation of the 2016-17 Global Scholar Grant application to the Global Scholarship**

Grants Subcommittee (GSGS) is **April 1, 2016.** The scholar applicant and the sponsoring club can begin preparation of the application at any time. *However, it may not be sent to the GSGS until the club's MOU and documentation have been received by the DRFC.*

☐ **6.** Applications for 2016-17 Club Project Grants

The deadline for presentation of 2016-17 Club Project Grant (CPG) applications to the District Block Grants Subcommittee (DBGS) is May 1, 2016. The club can begin preparation of the application at any time. *However, it may not be sent to the DBGS until the club's MOU and documentation have been received by the DRFC.*

Other Information

The documents to the right will be useful in completing these steps. They are downloadable from the district web site.

www.rotary5830.org

Select the "Forms and Information" tab just under the home page banner. Then select "For Future Vision Preparation".

If you have questions contact:

Carroll Greenwaldt

Ingrid Self

Club Memorandum of Understanding

Club MOU - Documentation Guide

Club MOU - Suggested Bylaws Amendments

Suggested RI Club Bylaws

903-235-6448 wgrnwldt@eastman.com

903-452-8711 iself@longviewtexas.gov

ROTARY CLUB OF XYZ

DOCUMENT RETENTION PLAN – ROTARY FOUNDATION GRANTS

Summary

The Rotary Club of XYZ adopts the following recordkeeping system to preserve important documents related to qualification and Rotary Foundation grants.

All of the documents collected will be maintained in a combination of both electronic and hard copy file folders. At the end of the fiscal year the Club Secretary will collect all the files for archival purposes and forward them to the incoming Club Secretary.

General Requirements

A. Club documents that must be maintained include, but are not limited to:
  1. Bank information, including copies of past statements.
  2. Club qualification documents, including:
      a. Signed club MOUs.
      b. Club attendance certification for grant management seminar.
  3. Club Project Grant and club-sponsored global grant information, including:
      a. Information collected from beneficiaries receiving club project grant funds.
      b. Receipts and invoices for all purchases made with grant funds.
  4. Documented plans and procedures, including:
      a. Financial management plan.
      b. Procedure for storing documents and archives
      c. Succession plan for bank account signatories and retention of information and documentation.
      d. System to track reports of misuse and/or mismanagement of grant funds.
  5. Annual report from the financial assessment and use of grant funds.
B. Club records must be accessible and available to District Rotary Foundation Committee and subcommittee members.
C. Documents must be maintained for a minimum of seven years, or longer if required by local law.

Organization of District and Global Grant Files by Rotary Year

A. Club Qualification Section
  1. Signed Club Memorandum of Understanding (copy if original sent to District)
  2. Copy of Club Bylaws
  3. Copy of Club Document Retention Plan – Foundation Grants
  4. Club Qualification Training - Certificate of Attendance
  5. Copy of most current Form 990

B. Individual Grants Section
  1. All grant correspondence, including email
  2. Grant application
  3. Grant reports
  4. Beneficiary documentation including
      a. Community assessment
      b. Agreements
  5. Vendor documentation including

      a. Quotes for materials
      b. Agreements
   6. Scholar documentation including
      a. Receipts and invoices
      b. Agreements
   7. Vocational training documentation including
      a. Receipts and invoices
      b. Agreements
   8. Grant related documentation including
      a. Financial documentation
      b. Bank statements
      c. Quotes from vendors
      d. Receipts and invoices
      e. Inventory list
      f. Photos
   9. Other information required by the district

C. Other documentation
   1. Grant management seminar materials
   2. Financial management plan and related procedures
   3. Bank information including
      a. Account details
      b. List of signatories
      c. Bank procedure for changing signatories
   4. Legal documents
   5. General ledger and statement of accounts (grant specific reports)
   6. Reports of misuse of grant funds
   7. Other documentation

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL
D – DISTRICT GRANTS
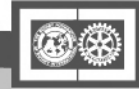
The District Grants Subcommittee (DGS) manages, promotes and encourages implementation of the Rotary Foundation district grant. The subcommittee helps clubs participate in educational, vocational, and humanitarian activities utilizing district grant funds.

FUNDED FROM DDF

District grants are funded solely by DDF generated from a district's Annual Fund giving from three years prior, including Permanent Fund SHARE earnings. Districts can request up to 50 percent of their DDF each year. Any unused district grant funds are returned to the Foundation and credited back to the district's DDF balance. DDF will continue to rollover to a district's balance for the following year. Rollover DDF will not be used in the calculation of the district grant amount.

CAN BE UP TO 50% OF DDF

Districts can request up to 50 percent of their District Designated Fund (DDF) in one annual grant. Districts are responsible for administering the activities undertaken with these funds. They may disperse these grant funds at their discretion for district or club sponsored activities. In addition:

- All activities funded with district grant funds must adhere to the eligibility requirements set forth in the terms and conditions for Rotary Foundation grants.
- Districts must be qualified by the Foundation to receive district grant funds.

TYPES OF ACTIVITIES

Districts may support a broad range of activities with their district grant funds. Examples of potential district grant activities include:

- Local or international service projects as well as service travel or disaster recovery efforts
- Vocational training teams:

  - No partnership or international requirements
  - No restrictions on team size or length of training
  - Teams travel to either conduct or receive training

- Scholarships:

  - No restrictions on the level (secondary, university, or graduate), length, location (local or international), or area of study
  - No restrictions on the dollar amount for the scholarships

DISTRICT POLICIES AND PROCEDURES

The District Grants Subcommittee will recommend to the DGE the amount of DBG funding to request from the forthcoming year's DDF. The recommendation will be made no later than the May 15th proceeding the DGEs DG year.

The DGS will develop that recommendation in the following order.

1. The subcommittee will accept Club Project Grant (CPG) applications through May 1. The subcommittee will review and accept all applications that meet CPG qualifying criteria between May 1 and May 15.
2. If the amount of approved CPG applications does not exceed 50% of DDF the subcommittee will review any other proposals made to utilize district grant funds on a district wide basis. For example, 4-Way Speech Contest Scholarships, Vocational Training Exchange Teams, or other intra-district or inter-district projects. All such proposals considered must benefit the district as a whole and not benefit any individual club.
3. The District Grant application will be made online as soon as possible after May 15 to facilitate the receipt of funds on July 1.

CLUB PROJECT GRANTS

Club project grants are funded from the District Grant funds received from the Rotary Foundation. They are a tool for Rotary districts to support Rotary clubs within the district to implement short-term humanitarian projects that benefit the community. Rotary clubs can work collaboratively to implement a project. A project can be implemented within the district or can be implemented in another country. Clubs can use these grants to fund scholarships, support vocational teams, sponsor volunteer service, provide disaster recovery assistance, and carry out community and international service projects.

Club Project Grant Application Requirements

In addition to the requirements set out in the Rotary Foundation's *Terms and Conditions for Rotary Foundation District Grants and Global Grants* Club Project Grant applications must meet the following district specified requirements to be approved for funding.

- Clubs applying for Club Project Grants must be "qualified".
- CPG applicants can request club project funding from the District Grant funds in an amount up to 25% of the club's 2013-14 Annual Fund giving.
- CPG applicants cash contributions to the club project must match or exceed the amount of funding requested from the District Grant funds. Volunteer labor cannot be used towards satisfying this requirement.
- CPG projects must be humanitarian in nature and address one or more of the six Rotary Foundation Areas of Focus. The project cannot be simply a pass through of funds to another charitable entity.
- CPG projects must have direct involvement of Rotarians by:
  o Assessment of community needs and development of a project plan
  o Establishment of a committee of at least three Rotarians to oversee the expenditure of funds.
  o Oversight of grant funds
  o Maintain clear and accurate accounting of grant funds
  o Involvement in the implementation of the project.
  o Provision of evidence of community involvement and ownership
  o Organization of meetings with local service providers, local officials, and/or recipients
  o Promotion of projects in the local media
  o Reporting of project status and expenditure of funds to District 5830 – District Grants Committee. All supporting documentation and expenditures of the District Grant project

must be kept by the club for period of five years after project completion and acceptance of the final report by the District Grants Subcommittee.

- CPG applications must be typed, signed and mailed or emailed (*in PDF or WORD format*) to the District Grants Subcommittee by May 1.
  - o Applications should be submitted single-sided and unbound.
  - o Handwritten applications will not be accepted.
  - o Signatures are not required if the application is submitted via email with both signatories email addresses in the email address line.
  - o Attachments should be used if space is not sufficient. Applications submitted by email will be considered signed if the email addresses of signatories are included in the cc: line of the message.
- CPG applications must include a detailed budget.

How and When To Apply

Applications will be received and reviewed during the following dates in any one Rotary year:

- For the Rotary year beginning July 1, 2016, the following dates shall apply:
  - o January 1, 2016 to May 1, 2016 –club to prepare and submit its application paperwork to the District Grant Committee as directed below via e-mail or mail.
  - o May 1, 2016 to May 15, 2016 – District Grant Committee will review submitted applications, contact the submitting club for clarification if necessary and award approved grants by May 15, 2016.
- Awards will be distributed by the District Treasurer within two weeks of the receipt of the District Grant funds from the Rotary Foundation.
- The Club Project Grant Application Package is available online at www.rotary5830.org.

Reporting Requirements

A final report is due within **one month** of the completion of the project to the District Grants Subcommittee. If the project is incomplete at January 15, 2017 an interim report is required. The project must be completed on or before May 1, 2017 and the final report must be received and accepted on or before June 1, 2017.

An interim report should provide the status of the project and projected completion date and actual and future expenditures against budget.

The final report is to provide photographs, media coverage and actual expenditure against budget. The club must submit receipts (matched against budget items) and an accounting of all expenditure of grant funds. Grant funds not used must be returned to the district. *All supporting documentation and expenditures of the Club Project Grant project must be kept by the club for period of seven years of project completion and acceptance of the final report by the District Grants Subcommittee.*

The Club Project Grant Report form is available online at www.rotary5830.org.

Failure to follow CPG requirements, failure to complete CPG projects or failure to file required CPG reports may disqualify the club from applying for future CPG and/or necessitate the repayment of CPG funds received.

TRF POLICIES AND PROCEDURES

District grants include no funding from the World Fund of the Rotary Foundation. As a result, the Rotary

Foundation demands less control over the qualification requirements, the application process and forms, and the grant management and reporting requirements than for global grants.

The descriptions of these requirements for Rotary year 2016-17 are listed below and shown in the next pages of this section.

5830 - 2016-17 Maximum CPG Request Amount
5830 - 2016-17 Club Project Grant Application – Requirements

TRF FORMS AND INSTRUCTIONS

The Rotary Foundation and District 5830 forms and instructions to be used for Rotary year 2016-17 are listed below and shown in the next pages of this section.

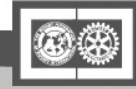5830 - 2016-17 Club Project Grant Application
5830 - 2016-17 Club Project Grant Funding Transmittal Letter
5830 - 2016-17 Club Project Grant Interim Report
5830 - 2016-17 Club Project Grant Final Report

DISTRICT 5830 FOUNDATION COMMITTEE MANUAL
2016-17 MAXIMUM CPG REQUEST AMOUNT

Club #	Club Name	Maximum CPG Request Amount	2013-14 AF Giving
1857	Athens	2,986.00	11,943.61
1858	Atlanta	238.00	950.00
50109	Big Sandy	30.00	120.00
78312	Bullard	-	-
29380	Canton	250.00	1,000.00
1859	Carthage	1,838.00	7,350.00
23907	Cedar Creek Lake	1,775.00	7,100.00
1860	Clarksville	1,148.00	4,592.00
1861	Gilmer	596.00	2,385.00
1862	Gladewater	688.00	2,750.00
1864	Hawkins	139.00	554.00
1865	Henderson	1,233.00	4,930.00
1855	Hugo	443.00	1,770.00
1856	Idabel	-	-
1866	Jacksonville	238.00	950.00
1867	Jefferson	491.00	1,965.00
1868	Kilgore	2,938.00	11,750.00
71155	Lake Fork	441.00	1,764.30
1869	Lindale	25.00	100.00
1870	Longview	3,451.00	13,805.00
1871	Longview Greggton	3,818.00	15,270.31
1873	Malakoff	3.00	10.00
1874	Marshall	1,370.00	5,478.00
1875	Marshall-Metro	134.00	535.00
1876	Mineola	313.00	1,250.00
1877	Mt Pleasant	1,268.00	5,070.00
1878	Mt Vernon	706.00	2,825.00
1879	Overton	3.00	10.00
1880	Paris United	2,305.00	9,221.50
1881	Pittsburg	1,658.00	6,630.00
1882	Quitman	588.00	2,350.00
1883	South Tyler	1,961.00	7,844.54
1884	Sulphur Springs	1,590.00	6,358.98
62773	Texarkana International	575.00	2,300.00
1885	Texarkana Oaklawn	1,310.00	5,241.00

DISTRICT 5830 FOUNDATION COMMITTEE MANUAL
2016-17 MAXIMUM CPG REQUEST AMOUNT
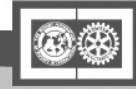
Club #	Club Name	Maximum CPG Request Amount	2013-14 AF Giving
52315	Texarkana Sunrise	194.00	777.57
1854	Texarkana-Wilbur Smith	3,116.00	12,463.00
1886	Troup	3.00	10.00
1887	Tyler	1,996.00	7,985.00
25381	Tyler Sunrise	775.00	3,100.00
50554	West Bowie County	-	-
1888	Wills Point	88.00	350.00
1889	Winnsboro	295.00	1,180.00
	Total	43,017.00	172,038.81

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL

2016-17 CLUB PROJECT GRANT APPLICATION – REQUIREMENTS

CLUB PROJECT GRANTS

Club project grants are funded from the District Grant funds received from the Rotary Foundation. They are a tool for Rotary districts to support Rotary clubs within the district to implement short-term humanitarian projects that benefit the community. Rotary clubs can work collaboratively to implement a project. A project can be implemented within the district or can be implemented in another country. Clubs can use these grants to fund scholarships, support vocational teams, sponsor volunteer service, provide disaster recovery assistance, and carry out community and international service projects.

Club Project Grant Application Requirements

In addition to the requirements set out in the Rotary Foundation's ***Terms and Conditions for Rotary Foundation District Grants and Global Grants*** Club Project Grant applications must meet the following district specified requirements to be approved for funding.

- Clubs applying for Club Project Grants must be "qualified".
- CPG applicants can request club project funding from the District Grant funds in an amount up to 25% of the club's 2013-14 Annual Fund giving.
- CPG applicants cash contributions to the club project must match or exceed the amount of funding requested from the District Grant funds. Volunteer labor cannot be used towards satisfying this requirement.
- CPG projects must be humanitarian in nature and address one or more of the six Rotary Foundation Areas of Focus. The project cannot be simply a pass through of funds to another charitable entity.
- CPG projects must have direct involvement of Rotarians by:
  - Assessment of community needs and development of a project plan
  - Establishment of a committee of at least three Rotarians to oversee the expenditure of funds.
  - Oversight of grant funds
  - Maintain clear and accurate accounting of grant funds
  - Involvement in the implementation of the project.
  - Provision of evidence of community involvement and ownership
  - Organization of meetings with local service providers, local officials, and/or recipients
  - Promotion of projects in the local media
  - Reporting of project status and expenditure of funds to District 5830 – District Grants Committee. All supporting documentation and expenditures of the District Grant project must be kept by the club for period of five years after project completion and acceptance of the final report by the District Grants Subcommittee.
- CPG applications must be typed, signed and mailed or emailed (*in PDF or WORD format*) to the District Grants Subcommittee by May 1, 2016.
  - Applications should be submitted single-sided and unbound.
  - Handwritten applications will not be accepted.
  - Signatures are not required if the application is submitted via email with both signatories email addresses in the email address line.

- o Attachments should be used if space is not sufficient. Applications submitted by email will be considered signed if the email addresses of signatories are included in the cc: line of the message.
- CPG applications must include a detailed budget.

How and When To Apply

Applications will be received and reviewed during the following dates:

- For the Rotary year beginning July 1, 2016, the following dates shall apply:
  - o January 1, 2016 to May 1, 2016 –club to prepare and submit its application paperwork to the District Grants Subcommittee as directed below via e-mail or mail.
  - o May 1, 2016 to May 15, 2016 – District Grants Subcommittee will review submitted applications, contact the submitting club for clarification if necessary and award approved grants by June 15, 2016.
- Awards will be distributed by the District Treasurer within two weeks of the receipt of the District Grant funds from the Rotary Foundation.
- The Club Project Grant Application Package is available online at www.rotary5830.org.

Reporting Requirements

A final report is due within *one month* of the completion of the project to the District Grants Subcommittee. If the project is incomplete at January 15, 2017 an interim report is required. The project must be completed on or before May 1, 2017 and the final report must be received and accepted on or before June 1, 2017.

An interim report should provide the status of the project and projected completion date and actual and future expenditures against budget.

The final report is to provide photographs, media coverage and actual expenditure against budget. The club must submit receipts (matched against budget items) and an accounting of all expenditure of grant funds including copies of bank statements showing deposit of district and other funds and expenditures made. Grant funds not used must be returned to the district. *All supporting documentation and expenditures of the Club Project Grant project must be kept by the club for period of seven years of project completion and acceptance of the final report by the District Grants Subcommittee.*

The Club Project Grant report forms are available online at www.rotary5830.org.

Failure to follow CPG requirements, failure to complete CPG projects or failure to file required CPG reports may disqualify the club from applying for future CPG and/or necessitate the repayment of CPG funds received.

Please note it is preferred that the application be received in electronic format such as a PDF or Word Document.

Completed applications should be emailed to:	Or mailed to:
DBGSC, Ingrid Self Email: iself@longviewtexas.gov Subject line: *Club Project Grant Application – Club Name*	District 5830 District Grants Ingrid Self 4206 Eric Lane Longview, TX 75605

TERMS AND CONDITIONS FOR ROTARY FOUNDATION DISTRICT GRANTS AND GLOBAL GRANTS

For grants awarded after 1 July 2013

The Rotary Foundation (TRF) may modify the terms and conditions of the grant at any time. Updates can be found on www.rotary.org/grants or requested from Rotary grants staff. Terms and conditions for packaged grants may be found on the website.

I. WHAT WE FUND

The Rotary Foundation funds district grants and global grants. District grants are block grants to districts that fund scholarships, projects, and travel that align with the mission of The Rotary Foundation, which is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty. Global grants fund scholarships, projects, vocational training teams, and some travel within the six areas of focus that are sustainable, measurable, and host community-driven.

II. ELIGIBILITY GUIDELINES

All Foundation grant activities must:

1. Relate to the mission of The Rotary Foundation

2. Include the active participation of Rotarians

3. Exclude any liability to The Rotary Foundation or Rotary International beyond the funding amount of the grant

4. Adhere to the governing laws of the United States and the host area of the grant, and harm no individuals or entities

5. 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. Planning for grant activities prior to approval is encouraged, but expenses may not be incurred. After grant approval, any changes to the original project plan must be pre-approved by TRF. TRF considers each semester of a degree program to be a new activity and therefore eligible for funding.

6. Demonstrate sensitivity to the host area's tradition and culture

7. Comply with the Conflict of Interest Policy for Grant Participants as outlined in section 10.030 of The Rotary Foundation Code of Policies

8. Comply with the policy regarding the use of Rotary Marks as outlined in section 4.090 of <u>The Rotary Foundation Code of Policies</u>

District Grants

1. Support local and international projects, scholarships, vocational training teams, and related travel

2. May allocate up to 3% of the grant award for grant-related administrative expenses such as bank fees, postage, software, and an independent financial assessment

3. May allocate up to 20% of the grant for contingencies

4. May fund projects and activities in Rotary and non-Rotary countries and geographic areas where permitted by applicable governing laws and in accordance with Foundation policies

5. May fund scholar and vocational training team orientation and grant management seminars

Global Grants

1. Align with one or more of Rotary's <u>areas of focus</u>

2. Are <u>sustainable</u>. Host communities must be able to address their own needs after the Rotary club or district has completed its work.

3. Are measurable. Sponsors select standard measures from the <u>Global Grant Monitoring and Evaluation Plan supplement</u>, and may add their own measurements in their report to the Foundation. Expenses to measure project outcomes are capped at 10%.

4. Are host community-driven. The host community designs the grant based on local needs that they have identified.

5. Can include up to 10% of the project budget for a project manager

6. Support humanitarian and educational projects

7. Provide scholarships to fund graduate-level coursework or research or its equivalent for a term of one to four academic years

8. Support vocational training teams that address a humanitarian need by providing or receiving professional training

9. Support travel for up to two individuals as part of a humanitarian project. These individuals provide training or implement the project should the host club confirm that their skills are not readily available locally.

10. Support communities in Rotary countries and geographical areas

11. Are sponsored by at least one Rotary club or district in the country or geographical area where the grant project will take place (primary host sponsor) and one or more outside that country or geographical area (primary international sponsor)

12. May allocate up to 10% of the project budget for contingencies to offer protection from price increases and/or currency fluctuations

III. RESTRICTIONS

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.

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 requirements detailed in section X.
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 not directly related to a humanitarian or educational activity
7. Project signage in excess of $500
8. Operating, administrative, or indirect program expenses of another organization
9. Unrestricted cash donations to a beneficiary or cooperating organization
10. Activities for which the expense has already been incurred
11. Transportation of vaccines by hand over national borders
12. Travel to National Immunization Days (NIDs)
13. Immunizations that consist solely of the polio vaccine
14. Study at a Rotary Peace Center partner university in the same or similar academic program as those pursued by Rotary Peace Fellows

Global grants

In addition to the restrictions listed above, global grants cannot fund:

1. Rotary Youth Exchange, RYLA, Rotary Friendship Exchange, Rotaract, or Interact;
2. International travel for youth under the age of 18, unless accompanied by their parents or guardians
3. New construction of or additions to any structure in which individuals live, work, or engage in any gainful activity, such as buildings (schools, homes/low-cost shelters, and hospitals), containers, and mobile homes, or of structures in which individuals carry out manufacturing or processing activities.
4. Travel for staff of a cooperating organization involved in a humanitarian project
5. Activities primarily implemented by an organization other than Rotary
6. Humanitarian projects that consist primarily of research-oriented projects or data collection
7. Humanitarian projects that consist solely of individual travel expenses

IV. HOW TO APPLY

Apply for grants online at www.rotary.org/myrotary/grants.

In order to receive a grant from The Rotary Foundation, all primary sponsor districts involved must be qualified by The Rotary Foundation, and for global grants, all primary sponsor clubs involved must be qualified by their district. In addition, districts, clubs, and all grant committee members must be in good standing with Rotary International and The Rotary Foundation. Individuals prohibited from serving on a grant committee include RI fiscal agents, national treasurers, and officers and paid staff of a cooperating or beneficiary organization associated with the grant. When acting as a primary sponsor, each district and each club is limited to 10 open grants at a time.

District Grants

Districts must establish a grant committee of three Rotarians, including the district governor of the implementation year, the district Rotary Foundation committee chair, and the district grants subcommittee chair. These three committee members are responsible for authorizing and submitting the district grant application.

Districts may submit one application per Rotary year, and this application must include a spending plan. Any requests for an increase in the grant amount must be made before any portion of the grant has been paid by the Foundation. Districts may reserve up to 20%of their district grant funds for contingencies that may arise during the year; note this contingency fund on the spending plan and itemize contingency items when you submit your final report. All district grant applications must be received before 15 May of the Rotary year for which the funds are requested. (For example, applications for 2013-14 district grants must be received by 15 May 2014.)

Global Grants

Primary host and international sponsors must each establish a grant committee of three Rotarians for a global grant. Members of this grant committee must come from the primary sponsor club (if the grant is club-sponsored) or district (if the grant is district-sponsored). For club-sponsored grant applications, district Rotary Foundation committee chairs must confirm that the primary sponsor clubs are qualified.

Sponsors may include a budget line item for contingencies representing no more than 10% of the total budget. Sponsors must report on the use of these funds or return them to the Foundation if they are not used.

Scholars and vocational training team members must submit individual applications to supplement the overall grant application. Grant sponsors should ensure that scholar and vocational training team applicants understand that their application must be approved by the Foundation before incurring any expenses or making travel arrangements. Applications are accepted on a rolling basis throughout the Rotary year; however, applications involving travel expenses should be submitted 90 days prior to the travel dates. Note that:

1. If grant applications are not completed and approved within six months of submission, the application will be withdrawn.

2. If payment requirements are not met within six months of approval, the grant will be canceled.

3. If grants are not implemented within 12 months of payment, the grant will be canceled and the sponsors will be required to return the funds.

Scholarship applications must:

1. Provide proof of university admission to a graduate-level program or letter of invitation to conduct postgraduate-level research when applying for the grant. Admission that requires a guarantee of financial support is acceptable.

Vocational training team applications must:

1. Support teams composed of at least two members with at least two years of work experience each in the area of focus and a Rotarian team leader who has a general level of Rotary knowledge, international experience, leadership skills, and some expertise within the area of focus. Non-Rotarians may serve as team leaders provided the sponsors establish the need for this in the grant application.

2. Confirm that if more than one team is traveling under a single grant, the teams must share the same two primary sponsors and begin travel within one year of each other.

3. All team members must be approved by The Rotary Foundation prior to travel. Any alterations to team composition must be reported to, and approved by, The Rotary Foundation.

Global grant applications for projects requesting between US$50,001 and $100,000 from the World Fund will receive a technical review and interim site visit by The Rotary Foundation Cadre of Technical Advisers. Scholarships and VTTs do not receive these additional reviews.

Global grant applications for projects requesting between $100,001 and $200,000 from the World Fund must be approved by the Trustees at one of their meetings. These applications will receive an advance site visit, audit and interim site visit by a member of the cadre Grants that consist exclusively of a vocational training team or scholarship are exempt from this requirement. Global grant applications received by:

1. 1 June will be reviewed by the Trustees in October

2. 1 October will be reviewed in January

3. 1 December will be reviewed in April

4. 1 March will be reviewed in June

V. TRAVEL POLICIES

Airfare for any travel funded by Rotary Foundation grants must be booked through Rotary International Travel Services (RITS)/BCD according to established travel policies.

Rotary Foundation grants will cover the following budgeted expenses related to travel:

1. Economy-class ticket(s)

2. Transportation to and from airport and local travel related to grant implementation

3. Cost of inoculations/immunizations, visas, and entry and exit taxes

4. Normal and reasonable luggage charges

5. RITS/BCD booking fees (ranges from US$50-US$70 per ticket)

Rotary Foundation grants will not cover the following expenses related to travel:

1. Expenses associated with optional stopovers before or after preapproved travel

2. Penalties resulting from changes in personal travel arrangements, including optional stopovers

3. Excess baggage charges, shipping charges, and any supplemental insurance

The club or district sponsoring the grant is responsible for maintaining emergency contact information and travel itineraries for all grant recipients traveling on grant funds. This information must be provided to the Foundation upon request.

Grant recipients are responsible for:

1. Making travel arrangements through RITS/BCD. Failure to arrange travel promptly may increase the cost of travel or result in the cancellation of the grant.

2. Any expenses that exceed the approved travel budget, unless approved by the Foundation

3. Meeting all medical requirements for international travel.

4. Arranging and funding any personal travel. Such travel may take place for a maximum of four weeks at the end of the grant activities, after which grant recipients are expected to return home.

5. Abiding by RI country travel restrictions.

All individuals receiving grant funding for travel are required to make their travel arrangements through RITS/BCD Travel. When using RITS/BCD, there will be automatic coverage by an insurance policy that meets Rotary International's travel insurance requirements. If receiving a grant without funding for travel, completing the travel report form is required to activate insurance coverage. The club or district sponsoring the grant should ensure that all grant recipients are aware of their insurance coverage. Visiting the grants travel insurance webpage is strongly recommended. No grant funding will be provided for additional insurance coverage that is purchased by choice.

Healthcare professionals who will be providing services as part of the grant activities are expected to have a minimum of US$500,000 in professional liability insurance coverage (a.k.a. errors and omissions liability). This refers to coverage for that participant's legal liability arising from their professional acts or omissions that cause

harm to others. The participant is responsible for obtaining and paying for this coverage.

Rotary International contracts a global security advisory firm to maintain a travel ban list of extremely dangerous countries. TRF-funded travelers are not permitted to travel to these countries due to safety concerns. If a country is added to the travel ban list while funded travelers are in-country, plans will be made for their immediate evacuation. Should the funded individual not defer travel to or evacuate from a country as instructed, it will result in TRF cancelling the grant and any funds already issued would need to be returned to TRF.

Non-Rotarians receiving grant funding for scholarships, participation in vocational training teams, or travel to implement a humanitarian project are expected to:

1. Demonstrate knowledge of Rotary

2. Participate in an orientation session before departure

3. Participate in club and district activities as requested by their sponsors

4. Be proficient in the language of the host country

In addition:

1. Relatives of a vocational training team member may participate on the same team if they meet eligibility requirements.

2. Rotarians and their family members may participate in a vocational training team as long as the team is providing training, not receiving training.

VI. HOW GRANTS ARE FUNDED

District Grants

District grants are funded by The Rotary Foundation solely with allocations from the District Designated Fund (DDF). A district may apply for a single grant each Rotary year to support one or more projects using up to 50% of the district's SHARE allocation, which represents 50%of its annual giving from three years' prior plus any Permanent Fund-SHARE earnings.

Global Grants

Global grants are funded by The Rotary Foundation from the World Fund, and awards range from US$15,000 to $200,000. The Foundation matches cash at 50%and DDF contributions at 100%. All global grants have a minimum budget of US$30,000.

The Foundation will match non-Rotarian contributions toward a grant, provided they do not come from a cooperating organization or a beneficiary of the project.

At least 30%of contributions to global grants funding humanitarian projects must come from outside of the project country and host project district. Host sponsors for humanitarian projects are encouraged to contribute toward the financing of the grant.

Grant financing cannot be changed after approval. Paul Harris Fellow recognition credit will only be given for sponsor contributions sent to The Rotary Foundation and will not be granted for contributions sent directly to the project. Contributions sent prior to grant approval may not be available for that specific grant. All global grant contributions are considered irrevocable contributions to The Rotary Foundation and will not be refunded.

VII. COOPERATING ORGANIZATIONS

Cooperating organizations are reputable non-Rotary organizations or academic institutions 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. No more than five global grants may be approved in one Rotary year for projects involving a single cooperating organization. Universities hosting scholars are not considered a cooperating organization.

District Grants

All funding provided to cooperating organizations must be used for specific project expenses. The sponsoring district must maintain an itemized report of such expenses.

Global Grants

At the time of application, grant sponsors need to provide a memorandum of understanding (MOU) signed by both primary sponsors and the cooperating organization. The MOU should include the following:

1. Verification from both primary sponsors that the grant is initiated, controlled, and managed by Rotary clubs or districts

2. Endorsement from the primary sponsors affirming that the cooperating organization is reputable, responsible, and acting within all governing laws

3. Grant implementation plan clearly delineating the activities of each party

4. Agreement from the cooperating organization to participate in any financial review by the Foundation of activities connected with the grant

VIII. PAYMENTS

District Grants

Grant funds will be paid only to the district or district foundation bank account identified by the district at the time of application. District grant funds will not be released until the previous Rotary year's district grant is closed. District grants are paid out at the current RI exchange rate at the time of payment. Funds are not available

after the close of the implementation year; if sponsors do not meet all payment requirements by 15 May of the implementation year, the grant will be canceled.

Global Grants

Grant funds will not be released until sponsor contributions have been submitted to The Rotary Foundation, any payment contingencies have been met and the legal agreement has been authorized. Grant funds will be paid to the account provided in the application. Account signatories must be members of the sponsoring club or district. Grants will be paid out at the current RI exchange rate at the time of payment. If a grant project is canceled after the project sponsors receive payment, all remaining grant funds must be returned to the Foundation, where they will be credited to the World Fund.

The following points apply to global grants funded with cash contributions:

1. All grant-related transactions will be recorded using the current published monthly RI exchange rate, and all grant-related transactions will be officially communicated in US dollars.

2. For the portion of the grant funded by cash contributions, sponsors will be shielded from currency exchange fluctuations in excess of 10% of the rate at time of approval. Conversely, TRF will not distribute currency gains to project sponsors in excess of 10% of the rate at time of approval.

Contributions applied to an unidentifiable project will be held for 90 calendar days. Donors will be requested to advise TRF if funds should be transferred to another project or fund. If donors do not recommend action within 90 days of receipt or grant cancellation, TRF will transfer the contribution to Annual Fund – SHARE. If the source of the funds cannot be identified, after 90 days of receipt or grant cancellation, TRF will transfer the contribution to Annual Fund – World Fund. These rules will not apply if caused by TRF error or processing delay, as determined by TRF staff.

IX. REPORTING REQUIREMENTS AND DOCUMENTATION

Grant recipients are responsible for reporting on the use of grant funds to The Rotary Foundation. Progress and final reports must be submitted online and all forms must be completed in their entirety for the report to be accepted. New grant applications will not be accepted by the Foundation if a grant sponsor has an overdue report for any Foundation grant. The Foundation reserves the right to review grants at any time, conduct an audit, send a monitor, require additional documentation, and suspend any or all payments.

The following reporting criteria also apply to grant recipients:

1. Unused grant funds must be returned promptly to The Rotary Foundation.

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 grant projects must return grant funds in their entirety and may be barred from receiving future grants for a period of up to five years.

District Grants

These additional criteria apply to district grants:

1. Final reports documenting the disbursement of funds must be submitted to the Foundation within 12 months of receiving the payment, or within two months of the grant's total disbursement.

2. All grant projects and activities funded by district grants must be completed within 24 months of disbursement by the Foundation or the local district to the club or project site.

3. Unused grant funds in excess of US$500 must be returned promptly to The Rotary Foundation and will be credited to the district's DDF. Unused grant funds below US$500 must be used for charitable purposes that meet the district grant eligibility requirements.

Global Grants

These additional criteria apply to global grants:

1. Progress reports must be submitted within 12 months of receiving the first grant payment and every 12 months thereafter.

2. Final reports must be submitted within two months of completing the project.

3. Unused grant funds in excess of US$500 must be returned to The Rotary Foundation and will be credited to the World Fund. If grant funds remain after a project's completion, the Foundation may approve their use for project-related expenses, such as additional project supplies.

Acceptable reports contain detailed accounts of the project's implementation, including:

1. A description of how the project has advanced the goals of the selected area(s) of focus

2. An account of how the project achieved the specific objectives outlined in the application, including the relevant measures and data collected

3. An explanation of how the project's outcomes will be sustained over time

4. A description of the participation of both host and international partners, as well as any cooperating organizations associated with the grant

5. The report should also include a detailed account of spending for the project and project account bank statements. Additionally, the Foundation may request that sponsors submit receipts in support of the report.

The Foundation will close the grant once the project implementation is complete and sponsors have demonstrated

that sustainability measures are in place to ensure that the local community will continue the project.

X. MICROCREDIT

The Rotary Foundation is committed to using microcredit programs to facilitate small, self-help enterprises. Clubs and districts applying for global grants are encouraged to partner with reputable and established cooperating organizations/microfinance institutions to administer loan programs as a way of undertaking sustainable development projects. However, microcredit programs funded by the Foundation must incorporate a component, such as training, that extends beyond the management of loan capital. In addition:

1. Clubs and districts that wish to use global grant funds to support a microcredit project must submit the microcredit supplement form with the grant application.

2. Microcredit activities must be supervised and controlled by the sponsoring club or district.

3. Interest and fees generated by microcredit fund capital from The Rotary Foundation may be used for administrative expenses that directly support the project.

4. Grant sponsors must submit a microcredit supplement form with the final grant report.

5. If a microcredit project is terminated before the Foundation's reporting requirements are met, grant funds must be returned to The Rotary Foundation.

6. The Rotary Foundation will not fund loan guaranty systems.

XI. SPECIAL CONSIDERATIONS FOR ROTARY FOUNDATION (INDIA)

The Rotary Foundation and the Rotary Foundation (India) encourage all Rotary clubs and districts in India to become registered with the Government of India (GOI) under the Foreign Contribution Regulation Act (FCRA). For general information about the FCRA, go to http://mha.nic.in/fcra.htm; for registration forms, go to http://mha.nic.in/fcra/intro/forms.html.
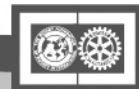
In addition to all other terms and conditions, grants with full or partial payment to a Rotary club or district in India should follow these payment and reporting procedures to comply with GOI laws and the FCRA:

1. Grant funds will not be released to a bank account in India unless all general payment conditions listed below have been met. Either the sponsors provide documentation showing that the bank account is registered under the FCRA or staff must determine that sufficient funds are available from contributions made within India. Otherwise, the payment will be placed in a queue and paid on a first-come, first-served basis only when additional contributions are made and sufficient funds are available. The sponsors of grants must ensure funds are not co-mingled.

    a. District Grants - Payment is contingent upon the approval of a detailed spending plan that includes an itemized budget for each listed project or activity. Grant funds will be paid only to the district bank account. The name of the district bank account must be easily identifiable with both the district and the project. (A proper naming example is Rotary District 0000 District Grant 12345). District grant funds will not be released until the previous Rotary year's district grant is closed. Funds are not available after the close of the implementation year; if sponsors do not meet

all payment requirements by 15 May of the implementation year, the grant will be canceled.

    b. Global Grants – Grant funds will not be released until all sponsor contributions have been submitted to The Rotary Foundation and any payment contingencies have been met. Grant funds will be paid to the account provided by the grant sponsors.

2. Progress reports on grant funds released to India through 31 March are due by 31 May of that same year. Final reports are due two months after the grant's completion. Grant sponsors must ensure that funds received in a FCRA-registered bank account are not co-mingled with local funds.

3. All progress reports must:

    a. Meet all general reporting requirements as listed in section IX.

    b. Show that a copy of the progress report filed electronically at www.rotary.org/grants has been submitted to the South Asia Office.

    c. Include a utilization certificate if a portion of the grant amount has been used, along with statement of receipt and payment for the grant amount, certified by an independent chartered accountant (indicating membership number of the CA)

    d. If the grant funds were not used for any reason, include an original bank statement or bank passbook (or a photocopy certified by the bank manager or a chartered accountant) indicating the date on which the grant amount was credited and a statement explaining why the grant amount has not yet been used, even if the grant amount was received before March

4. All final reports must:

    a. Meet all general reporting requirements as listed in section IX.

    b. Show that a hard copy of the final report filed electronically at www.rotary.org/grants has been submitted to the South Asia Office.

    c. Include the following:

        i. A utilization certificate along with statement of receipt and payment for grant amount, certified by an independent chartered accountant (indicating membership number of the CA)

        ii. An original bank statement or bank passbook (or a photocopy certified as true copy by the bank manager or a chartered accountant)

        iii. A bank reconciliation statement, if multiple grants were paid to a single FCRA account

        iv. Originals or photocopies of bills of payment/expenses vouchers and, if only photocopies are provided, a written undertaking that "all originals will be kept for a period of eight years and will be produced as and when required by Rotary Foundation (India)"

        v. Beneficiary information (for example, photographs, newspaper clippings, appreciation letter from beneficiary)

    d. Return of any remaining funds of any amount to the Rotary Foundation (India)

5. A FCRA-registered club or district is responsible for furnishing FC-6 return along with the financial statements to the Ministry of Home Affairs, New Delhi, in a timely manner.

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL
2016-17 CLUB PROJECT GRANT APPLICATION

COMPLETION CHECKLIST

Before submitting your Club Project Grant application, please take a moment to review this checklist. If you have any questions or concerns, please contact the District Grants Subcommittee.

Please check each box when you are sure the item has been completed!

☐ Is your club qualified?

☐ Does the project meet **all** grant policies and guidelines of **The Rotary Foundation and District 5830**?

☐ Does the project address at least one area of focus?

☐ Does the project description clearly state how the project will assist those in need?

☐ Are the activities of the sponsoring partner(s) clearly explained?

☐ Will the Rotarians be actively involved in the project?

☐ Has the sponsoring partner(s) created committees to oversee the project?

　☐ Are these individuals correctly listed on the application with their complete contact information?

☐ Is a detailed, itemized budget included in the application?

☐ Are all partner contributions listed in the application, noting which contributions will be cash and which will be District grant funds?

☐ Have all sponsoring committee members provided their authorizing signatures?

☐ If a cooperating organization is involved, are the following letters included with the application:

　☐ Letter from the organization specifically stating its responsibilities, how it will interact with Rotarians, and agreeing to cooperate in any financial review of the project

　☐ Letter of endorsement from the host partner confirming that the cooperating organization is reputable and works within the laws of that country

☐ If the project involves a revolving loan or microcredit, are the Revolving Loan Fund Supplement and Credit Group Plan included?

☐ Have the partners made copies of all documents for their files prior to submitting them to District Grants Subcommittee?

Please complete this form entering information inside text boxes and then printing an original for signatures. Tab from text box to text box to enter information. Most boxes are expandable. For boxes that do not expand use additional sheets of paper and indicate "See additional information" in the box.

1. [   ]   [   ]
   Club Number   Club Name

2. Briefly describe the project, its location, and its objectives.

[   ]

Start Date [   ]   Estimated Completion Date [   ]

3. Describe how the project will benefit the community and/or improve the lives of the less fortunate.

[   ]

4. Describe non-financial participation by Rotarians in the project (i.e., Rotarian activities and number of Rotarians involved)

[   ]

5. If this is an international project, how will the host and international partners communicate and work together to implement this project?

[   ]

6. If additional district funding is available; please outline what effect this funding would have on your proposal and what adjustments would be explored? Would your club be able to match additional funds, if awarded?

[   ]

7. Project Contacts –Two Rotarians must be listed who will provide oversight and management of the project funds.

Primary Contact Name		Rotary Position Title	

Address

Telephone		Fax	

E-mail

Secondary Contact Name		Rotary Position Title	

Address

Telephone		Fax	

E-mail

8. Budget - Please include a complete, detailed, and itemized budget for the entire project. Supporting documentation utilized for the development of this budget may be requested.

Description	Dollars
Total Budgeted Cost	

Amount of District grant funds requested by club:	
Amount of financial funds provided by club: *(Must at least equal amount of grant requested.)*	
Other	
Total Budgeted Funding	

9. How will the general public know this is a Rotary-sponsored project? Please provide details, e.g., publicity in a newspaper or display of the Rotary wheel.

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10. Cooperating Organizations — if the project involves a cooperating organization please provide the name of the organization below and attach a letter of participation from that organization that specifically states its responsibilities and how Rotarians will interact with the organization in the project. *By signing this application, the Rotarian sponsors endorse the organization as reputable, responsible, registered with the project country, and acting within the laws of the project country.*
Name(s) of Cooperating Organization(s)

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```

Authorization — All Rotary clubs involved in this project are responsible to District 5830 and The Rotary Foundation for the conduct of the project and for reporting on it. *The signatures on the application confirm that the sponsors understand and accept the responsibility. The signatures of the sponsors also affirm that all information in this application is true and accurate, to the best of their knowledge.*

2016-17 CLUB PRESIDENT Rotary Club of	2016-17 CLUB FOUNDATION CHAIR Rotary Club of
I hereby affirm that the Club has voted to undertake this project as an activity of the club.	I hereby affirm that the Club has voted to undertake this project as an activity of the club.
Name, Printed	Name, Printed
_____ Signature	_____ Signature
Date	Date

Complete applications should be sent to:

District 5830 – District Grants Subcommittee
Attention: Ingrid Self
4206 Eric Lane
Longview, TX 75605

Email: iself@longviewtexas.gov

__Please note it is preferred that the application be received in electronic format such as a PDF or Word Document__.

DISTRICT GRANTS SUBCOMMITTEE SECTION

Explanation: The District Grants Subcommittee will review the application. If the application is not complete or eligible, it will be returned to the host partner with a brief explanation. If the application requires additional information, the host partner will be advised and given time to respond.

Recommended: _____ Date: _____

District Grants Subcommittee Member, _____

Recommended: _____ Date: _____

District Grants Subcommittee Member, _____

Recommended: _____ Date: _____

District Grants Subcommittee Member, _____

Recommended: _____ Date: _____

District Grants Subcommittee Member, _____

Recommended: _____ Date: _____

District Grants Subcommittee Member, _____

Assigned DG Number: DG _____

Amount Approved: $ _____

DISTRICT GRANTS SUBCOMMITTEE CHAIR CERTIFICATION

Explanation: District 5830 requires that the District Grants Subcommittee chair certifies the application as complete. If the application is not complete or eligible, it will be returned to the host partner with a brief explanation.

"On behalf of the committee, I hereby certify that to the best of my knowledge and ability this grant application is complete, meets all TRF guidelines, and is eligible for funding."

Print name of DGS	_____	Signature	_____
District	5830	Date	_____

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL
2016-17 CLUB PROJECT GRANT INTERIM REPORT

**INTERIM REPORTS ARE <u>DUE JANUARY 15, 2017</u>
FOR INCOMPLETE 2016-17 CLUB PROJECT GRANT PROJECTS**

Please complete this form online by entering information inside text boxes and then print an original for signatures. Use additional sheets of paper if necessary and indicate "See additional information" in text box.

1. [   ]   [   ]
    Club Number   Club Name

4. Club Project Grant number?   [   ]

2. Has the project been started?

   Actual Start Date [   ]   Estimated Completion Date [   ]

3. If started

   a. What percent complete is the project?   [   ]

   b. What percent of the total budget has been spent?   [   ]

4. Does it appear the original objectives of the project will be achieved?   [   ]

5. If not, please explain.

[   ]

6. How has the general public been informed about this Rotary-sponsored project? Please provide details, e.g., publicity in a newspaper or display of the Rotary wheel.

[   ]

7. Cooperating Organizations — if the project involves a cooperating organization is the organization fulfilling its project responsibilities?   [   ]

8. If not, please explain.

[   ]

Authorization — All Rotary clubs involved in this project are responsible to District 5830 and The Rotary Foundation for the conduct of the project and for reporting on it. *The signatures on this interim report confirm that the sponsors affirm the status of this project. The signatures of the sponsors also affirm that all information in this interim report are true and accurate, to the best of their knowledge.*

2016-17 CLUB PRESIDENT Rotary Club of	2016-17 CLUB FOUNDATION CHAIR Rotary Club of
I hereby affirm that the status of the Club's 2016-17 Club Project Grant is as presented in this report.	I hereby affirm that the status of the Club's 2016-17 Club Project Grant is as presented in this report.
Name, Printed	Name, Printed
_____ Signature	_____ Signature
Date	Date

Complete interim reports should be sent to:

District 5830 – District Grants Subcommittee
Attention: Ingrid Self
4206 Eric Lane
Longview, TX 75605

Email: iself@longviewtexas.gov

Please note it is preferred that the interim report be received in electronic format such as a PDF or Word Document.

DISTRICT GRANTS SUBCOMMITTEE CHAIR CERTIFICATION

Explanation: District 5830 requires that the District Grants Subcommittee chair certify the interim report as complete. If the interim report is not complete, it will be returned to the host partner with a brief explanation.

"On behalf of the committee, I hereby certify that to the best of my knowledge and ability this grant interim report is complete, meets all TRF guidelines, and if a final report is considered closed."

Print name of DGS   _____   Signature   _____

District   5830   Date   _____

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL
2016-17 CLUB PROJECT GRANT FINAL REPORT

FINAL REPORTS ARE <u>DUE 30 DAYS AFTER COMPLETION</u> OF THE PROJECT BUT <u>NO LATER THAN JUNE 1, 2017</u>

COMPLETION CHECKLIST

Before submitting your Club Project Grant Final Report, please take a moment to review this checklist. If you have any questions or concerns, please contact the District Grant Subcommittee.

Please check each box when you are sure the item has been completed!

☐ The club has completed the project.

☐ The detailed budget vs. actual statement is completed.

☐ Copies of invoices, receipts, etc. supporting all expenditures are attached.

☐ Copies of bank statements are attached which show all project receipts and expenditures are attached.

☐ If a cooperating organization is involved, a letter from the organization specifically stating what responsibilities it has completed is attached.

☐ Pictures of the project including Rotarians involved are attached as well as any other publicity are attached.

☐ All partners have made copies of all documents for their files prior to submitting them to the District Grant Subcommittee.

Please complete this form online by entering information inside text boxes and then print an original for signatures. Use additional sheets of paper if necessary and indicate "See additional information" in text box.

1. [   ]   [   ]
     Club Number   Club Name

2. Briefly describe the final status of the project and what objectives were/were not met.

[text box]

Actual Start Date [   ]   Actual Completion Date [   ]

3. Describe how the project benefited the community and/or improved the lives of the less fortunate.

[text box]

4. Describe the non-financial participation by Rotarians in the project (i.e., Rotarian activities, number of Rotarians involved and number of Rotarian work hours)

5. If this is an international project, how have the host and international partners communicated and worked together to implement this project?

7. Project Contacts –Two Rotarians must be listed who will provide oversight and management of the project funds.

Primary Contact Name		Rotary Position Title	
Address			
Telephone		Fax	
E-mail			
Secondary Contact Name		Rotary Position Title	
Address			
Telephone		Fax	
E-mail			

8. Budget vs. Actual - Please include a complete, detailed, and itemized budget for the entire project. Supporting documentation for actual expenditures must be attached.

Description	Original Budget	Actual Amounts
Total Cost		

District Block Grant funds received by club:		
Funds provided by club: (***Must be at least equal to DBG funding.***)		
Other		
Total Funding		

9. How has the general public been informed about this Rotary-sponsored project? Please provide details, e.g., publicity in a newspaper or display of the Rotary wheel.

10. Cooperating Organizations — if the project involves a cooperating organization please provide the name of the organization below and <u>attach a letter of participation</u> from that organization that specifically states it has fulfilled its project responsibilities and how Rotarians interacted with the organization in the project. *By signing this final report, the Rotarian sponsors confirm that the organization has completed all aspects of the project they were responsible for in a reputable and responsible and acting within the laws of the project country*

.
Name(s) of Cooperating Organization(s)

Authorization — All Rotary clubs involved in this project are responsible to District 5830 and The Rotary Foundation for the conduct of the project and for reporting on it. *The signatures on this final report confirm that the sponsors affirm the status of this project. The signatures of the sponsors also affirm that all information in this final report are true and accurate, to the best of their knowledge.*

2016-17 CLUB PRESIDENT Rotary Club of	2016-17 CLUB FOUNDATION CHAIR Rotary Club of
I hereby affirm that the Club has completed this project as an activity of the club.	I hereby affirm that the Club has completed this project as an activity of the club.
Name, Printed	Name, Printed
_____ Signature	_____ Signature
Date	Date

 Complete final reports should be sent to:

District 5830 – District Grants Subcommittee

Attention: Ingrid Self

4206 Eric Lane

Longview, TX 75605

Email: iself@longviewtexas.gov

Please note it is preferred that the final report be received in electronic format such as a PDF or Word Document.

DISTRICT GRANTS SUBCOMMITTEE CHAIR CERTIFICATION

Explanation: District 5830 requires that the District Grants Subcommittee chair certify the final report as complete. If the final report is not complete, it will be returned to the host partner with a brief explanation.

"On behalf of the committee, I hereby certify that to the best of my knowledge and ability this grant final report is complete, meets all TRF guidelines and is considered closed."

Print name of DGS _____ Signature _____

District _____5830_____ Date _____

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL
E – GLOBAL SCHOLARSHIP GRANTS

The Global Scholarship Grants Subcommittee (GSGS) manages promotes and encourages implementation of Rotary Foundation global scholarship grants. The subcommittee helps clubs participate in educational, vocational, and humanitarian activities utilizing global scholarship grant funds.

DISTRICT POLICIES AND PROCEDURES

The subcommittee will accept global scholarship grant applications from January 1 to March 31. The subcommittee will interview and select applicants for submission to the Rotary Foundation from April 1 to April 15. The number of applicants selected will be determined by the amount of DDF the District Governor has allocated to Global Scholarship Grants.

Global scholarship grant applicants must be sponsored by a Rotary club in District 5830. The sponsor will work with the applicant to understand the grant requirements and prepare the grant application. If the applicant is successful in securing a grant the sponsor club will be responsible for the administration of the grant including grantee communication, grant reporting to GSGS and TRF, grant funds management and other grant management responsibilities as may be required by the GSGS or the Rotary foundation.

TRF POLICIES AND PROCEDURES

Global scholarship grants include funding from the World Fund of the Rotary Foundation. As a result, the Rotary Foundation demands greater control over the qualification requirements, the application process and forms, and the grant management and reporting requirements.

The descriptions of these requirements for Rotary year 2016-17 are listed below and shown in the next pages of this section.

5830 – Global Scholarship Grants – Policy Guide
TRF – Facts About Rotary Scholarships
TRF – Global Grant Scholarships Supplement
TRF – District Grants Scholarships Best Practices
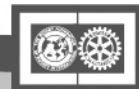
TRF FORMS AND INSTRUCTIONS

The Rotary Foundation and District 5830 forms and instructions to be used for Rotary year 2016-17 are listed below and shown in the next pages of this section.

TRF – Global Grant Scholarship Candidate Application Template
5830 – Global Scholarship Grant – TRF Application

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL

GLOBAL SCHOLARSHIP GRANTS – POLICY GUIDE

INTRODUCTION

The new Rotary Foundation grant system builds on the very best of Rotary's history with scholarships while expanding opportunities and simplifying rules, in order to make funding education easier than ever. To experience the greatest success with scholarships under Future Vision, it is best to utilize the model as it is presented rather than attempt to re-create the Ambassadorial Scholarships program. With that in mind, we created this guide to illustrate what is possible.

SCHOLARSHIP TYPES

Future Vision offers maximum flexibility in funding scholars. Districts can determine the types of scholars they wish to sponsor using funds from a district grant. These could include:

- Undergraduate or graduate students studying locally, any subject matter
- Undergraduate or graduate students studying abroad, any subject matter
- Study periods of any length (language training, a certificate program, a semester, a year or more)

The district leadership should determine its own preferences, applications, and timetables for district grant-funded scholars. Your Future Vision coordinator at the Foundation is always available to help, and can provide examples of how other districts have organized their district grant scholarship process.

The Foundation also awards scholarships through global grants, which may or may not be a component of a larger grant application (e.g., scholarship plus a humanitarian project). These scholarships are funded using cash and/or DDF allocations and are matched by the World Fund, making them a cost-effective choice. These scholarships fund:

- Graduate students studying abroad in one of the six areas of focus
- Scholarships lasting one to four years, thereby enabling Rotarians to fund entire degree programs

TIMELINES

District grant scholarship applications adhere to internal district timelines.

Global grant scholarship proposals and applications are accepted on a rolling basis throughout the year, although applications and payment information should be submitted at least three months before studies begin in order to allow adequate time for Foundation review and

processing. Applicants must provide proof of admission at the time of application; the DDF allocation is drawn from the year in which the application is approved. Clubs may sponsor applicants independently, using cash for a World Fund match. Alternatively, clubs may work through their districts to obtain DDF funding for a World Fund match. Districts that decide to organize a district-wide competition for global grant scholarships will need to publicize any deadlines they set for this process.

APPLICANT ELIGIBILTY

District grant scholars aren't required to study at the graduate level or to undertake studies in one of the six areas of focus. However, district grant scholars must meet whatever eligibility criteria the district establishes. For example, a district may decide to sponsor a scholar who possesses outstanding ambassadorial traits.

Global grant scholars are individuals who are pursuing a career in one of the six areas of focus. Their graduate-level educational goals should support this career interest.

Peace and Conflict Prevention/Resolution

Disease Prevention and Treatment

Water and Sanitation

Maternal and Child Health

Basic Education and Literacy

Economic and Community Development

For example, a prospective MBA candidate who wishes to pursue a career in the financial markets doesn't fit within the economic and community development area of focus, even though it relates to finance. But a prospective MBA candidate who wishes to pursue a career in microcredit or with a nongovernmental organization might be a good fit.

If you're uncertain as to the eligibility of a candidate's study programs or career goals, contact the Rotary Foundation Coordinator for your district before you submit the proposal.

Specific eligibility requirements and conditions for global grants include:

- The candidate must be proficient in the native language of the host country (please contact your global grant coordinator for exceptions).
- The candidate's program of study must be at the graduate level.
- The scholar must be traveling abroad for study.
- The scholarship is for a term of one to four academic years.
- The minimum grant amount is US$30,000. If the grant is funding a scholarship exclusively, this means that the scholarship amount is at least $30,000. (If the grant is also funding a humanitarian project, the scholarship portion could be less, but the overall grant budget must be at least $30,000.)

- Scholars need to live in their host district.
- Global grants follow a two-step application process: a proposal followed within six months by an application. The candidate must be admitted to his/her study program by the time of the application, but not at the time of the proposal.
- At the time of the proposal, the candidate must know where he/she wants to study and the sponsors must identify the name of a primary contact in the host district.
- Scholarships may not be used for studies that are already underway.

In global grants, ambassadorial skills are optional for scholars. The primary consideration is forging a link between Rotary and future skilled professionals within an area of focus. That said, global grant scholars are expected to participate in Rotary activities, and their Rotarian sponsors should provide opportunities for them to do so.

With this in mind, here are some optional qualities that clubs and districts might consider when sponsoring a candidate. The candidate should be someone who:

- Possesses excellent leadership skills and potential
- Has a proven record of success in his/her academic field or vocation
- Has demonstrated a personal commitment to community service
- Has well-defined and realistic goals
- Has concrete ideas as to how he/she will make advances within his/her chosen career field
- Is sincere about maintaining a lifelong relationship with Rotary after the scholarship period

MARKETING

Clubs and districts may certainly publicize scholarship opportunities funded through either district grants or global grants. Because of the specialized nature of global grant studies, Rotarians may wish to work with universities to identify potential global grant scholars (e.g., outstanding graduates of a water engineering program who are seeking funding for graduate school in the same field). Alternatively, universities can alert Rotary clubs to students who have been accepted into their graduate programs that fall within a particular area of focus.

ROLES AND RESPONSIBILITIES

District Grants

District Leadership
District leadership is responsible for administering any scholarships funded by a district grant.

Before the district grant scholar has been selected
- Create a scholarship application. Things to consider when preparing this application include:
- What criteria will your district use to evaluate prospective scholars?
- Is your district interested in funding particular fields of study?
- Is the application open to candidates studying both locally and internationally?

- What is the scholarship award amount? Is it intended to cover tuition, travel, living expenses, etc.?
- Establish a district scholarships committee to review scholarship applications and to communicate with scholars throughout their study.

After the application is approved
- Arrange for scholars to attend a regional orientation, or provide orientation materials and information to scholars individually.
- If the scholar is studying abroad, initiate communication with the district in which the study institution is located to discuss what role, if any, it will play in assisting with the student's trip. This assistance may include:
    - Help with local housing arrangements
    - Assistance with preparation of a budget
    - Transportation to/from the airport and to local Rotary club meetings and events
- Provide the scholar with the International Travel Checklist, which includes suggested best practices for planning a safe, cost-effective trip.

During the scholarship period
- Communicate to the scholar the district's expectations regarding reporting and presentations. Things to consider:
    - Will your district require scholars to submit midyear reports? If so, what format should be used (e.g., e-mail update to scholarship committee, blog or website, paper report)?
    - What information will your district require in the scholar's final report?
    - Are the guidelines for scholars to follow for collecting receipts clear? (The district will need to keep receipts for all expenses of US$75 and more.)

Global Grants

International sponsor
Before the global grant proposal/application is submitted
- Assist the candidate in completing the scholarship application form and preparing for club and district interviews, if necessary.
- Identify any relevant application or other deadlines (e.g., university deposits) the candidate may have.
- Provide the candidate with a copy of the Terms and Conditions for Rotary Foundation District Grants and Global Grants.
- Assist the candidate in creating an award budget as well as a personal one (see Appendix A).
- Contact the district Rotary Foundation chair or governor in the host district for assistance in finding a primary host sponsor and host counselor. Early contact between the host and international sponsor Rotarians can help facilitate the scholar's transition in the host country. (You can find contact information for district and club officers in Member Access.)

After the global grant application is submitted
- Inform the candidate of any requests for additional information from your Future

Vision coordinator so you can supply it through Member Access or e-mail.

After the global grant application is approved
- The Foundation provides funds directly to sponsor Rotarians for scholars. Your club or district will need to decide payment details, such as:
    o Do you wish payment to go to the international sponsors or the host sponsors? Consider currency fluctuation when deciding where to send the funding for your scholarship.
    o How many payment installments will be made? (If paying in installments, figure out what you will require of the scholar before making subsequent payments.)
- Clearly communicate payment and reporting schedules to the scholar. Provide the scholar with a copy of the approved budget and communicate expectations about eligible expenses (e.g., groceries, yes; liquor, no).
- Complete the payment process along with the host sponsors online.
- Once the funds have been transferred, send funds to the scholar based on the previously established schedule.
- Arrange for a scholarship orientation in your own district or a neighboring one, or online (see below for more detailed information).
- Arrange visits to Rotary club meetings, district functions, and other Rotary-related events, if desired.
- Consider supplying the scholar with small club banners to exchange while abroad. An adequate supply of business cards with the Rotary emblem would also be helpful.

During the scholarship period
- Maintain regular correspondence with the scholar in order to share news with fellow Rotarians at sponsor club meetings and to enable the award recipient to relate news about the sponsor club to the host club.
- Encourage the scholar to share concerns or problems experienced abroad. An award recipient may sometimes feel uncomfortable involving the host counselor in a sensitive issue and will turn to you as a sympathetic contact back home.
- If the scholarship period is longer than 12 months, collect interim reports from the scholar for submission to TRF and receipts for expenses of US$75 and more for the club or district's records, per the terms of qualification.

After the scholarship
- If possible, arrange to meet and welcome the award recipient home.
- Help the scholar arrange speaking engagements at clubs in your district. In addition to giving club members the opportunity to learn about the scholar's experiences, such events help publicize the Foundation.
- Ensure that the scholar submits a final report to you, with applicable receipts.
- Encourage the scholar's participation in any Foundation alumni activities available in the district in which he/she resides after the scholarship term.
- Maintain communication with the scholar and keep track of his/her current address.

Host sponsor
Before the global grant proposal/application is submitted
- Correspond with the applicant and introduce yourself, your family, and your city.
- Assist the scholar in expediting the university admissions process, if necessary.
- Assist in providing reasonable budgetary parameters for living expenses.

After the global grant application is approved
- Assist the scholar in locating appropriate housing, especially if university housing is not available.
- Make arrangements to meet the scholar upon arrival. In your absence, arrange for another Rotarian to meet the scholar.
- If your district or region offers inbound scholar orientations, include the scholar.
- Work with international sponsors to determine a payment plan for the scholar and help complete online payment details, if needed.

During the scholarship period
- Invite the scholar to your weekly club meetings and the district conference.
- Contact your governor to suggest using the district newsletter to publicize the scholar's availability for speaking engagements and to publicize scholar activities.
- Encourage other Rotarians to share in providing home hospitality.
- Be available to provide advice to the scholar; encourage open communication.
- Keep track of the scholar's location to enable the sponsors to contact him/her in the event of a natural disaster or personal crisis.

After the scholarship
- Invite the scholar to make a farewell speech to your club.
- Meet with the scholar to make sure that all necessary closing tasks have been completed (e.g., housing arrangements, bank accounts).
- Discuss the scholar's post-scholarship plans, and. obtain updated contact information.
- Remind the scholar that he/she may make his/her own arrangements for personally funded travel at the end of the scholarship for a maximum of four weeks.

ORIENTATION

Global grant scholars are required to participate in an outbound orientation session before departure. District grant scholars need only do this if their sponsor district requires it.

There are several options:
- Regional scholar orientation seminars for Ambassadorial Scholarships
- District-run orientation
- Club-run orientation
- Self-guided online orientation (using TRF presentation)

Regional scholar orientation seminars
There are a number of regional scholar orientation seminars worldwide. As indicated, these have traditionally focused on Ambassadorial Scholars; however, Future Vision supplemental materials are now available to make these orientations relevant to global grant — and district grant — scholars. A list of all regional orientation seminars is regularly updated and accessible on the RI Website. If you would like to send a scholar to one of these orientations, contact the organizer listed on the website. For the Future Vision supplemental materials, contact your district's Foundation Coordinator.

District-run orientation

If your district would like to organize its own scholar orientation seminar, contact your district's Foundation Coordinator for materials. Regional orientation seminar organizers may also be willing to provide feedback and assistance.

Club-run orientation
If a scholar is club-sponsored, the club may hold an individual orientation. The same material should be covered as in a regional or district orientation but it does not need to be as formal or lengthy. Contact your district's Rotary Foundation Coordinator for seminar materials.

Online orientation
The Rotary Foundation has created a scholar orientation that, when necessary, may be used in place of other orientations. This orientation takes approximately 30 minutes and may be done from home. The presentation includes information on
- The Rotary Foundation, Future Vision, and global grants
- Global grant scholar responsibilities
- Reporting requirements
- Strategies for success
- Sexual harassment and inappropriate behavior

All scholars will be asked to complete the online orientation as part of the pre-departure process and it is included in the global grant scholar acceptance packet.

SEXUAL HARRASSMENT AND CRISIS MANAGEMENT

To help provide protection and support to both Rotarians and scholars, the Foundation requires that scholar orientations include a section on sexual harassment, and also maintains a guide on crisis management, available from Future Vision staff. We recommend that you review both the guide and The Rotary Foundation Board of Trustees' policy on sexual abuse and harassment:

7.080. Sexual Abuse and Harassment Prevention
All Rotarians, clubs, and districts are required to follow the statement of conduct for working with youth guidelines established by Rotary International, and the following guidelines adopted by The Rotary Foundation Trustees:

1. TRF has a zero-tolerance policy against sexual abuse and harassment.
2. An independent and thorough investigation must be made into any claims of sexual abuse or harassment.
3. Any person involved in a TRF program against whom an allegation of sexual abuse or harassment is made must be removed from all contact with TRF program participants until the matter is resolved.
4. Any allegation of abuse must be immediately reported to the appropriate law enforcement agency, in accordance with TRF's zero-tolerance policy.
5. The Rotary Code of Policies provides guidelines pertaining to Rotary clubs and their members who are found to be involved with sexual harassment. A non-Rotarian who admits to, is convicted of, or is otherwise found to have engaged in sexual abuse or harassment must be prohibited from working with TRF program participants in a Rotary context.
6. If an investigation into a claim of sexual abuse or harassment is inconclusive, then, for the safety of TRF program participants and the protection of the accused, additional

safeguards must be put in place to assure the protection of any TRF program participants with whom the individual may have future conduct. If there are subsequent claims of sexual abuse or harassment, the person shall be permanently prohibited from working with TRF program participants in a Rotary context. Regardless of criminal or civil guilt, the continued presence of the person could be detrimental to the reputation of the organization and could be harmful to TRF program participants. It can also benefit the person in preventing additional accusations from other TRF program participants. A person who is accused but later cleared of charges may apply to be reinstated to participate in TRF programs. Reinstatement is not a right, and no guarantee is made that he or she will be reinstated to his or her former position.

7. The general secretary shall take steps to ensure a Rotary district's compliance with these guidelines should it be determined that a district is not adhering to them. (April 2005 Trustees Mtg., Dec. 118)

REPORTING REQUIREMENTS

District Grants

Clubs and districts that sponsor scholars through district grants need to retain receipts for all expenses equal to or greater than US$75 related to the scholarship. These may be needed should there be an audit.

Be sure to make this expectation clear to your scholars, and let them know where in the district to send their receipts.

Global Grants

Because the sponsoring Rotarians are applying for the global grant and will be providing funding directly to the scholars, it is their responsibility to report on the use of those funds.

The scholar is required to send a report to his/her sponsoring Rotarians every 12 months for the duration of the scholarship. If the scholarship period is less than 12 months, the scholar is required to send a final report to his/her sponsoring Rotarians at the end of the scholarship period.

Each scholar report will provide the following:
- Summary of the studies/research and the relationship to the pertinent area(s) of focus
- Summary of Rotary and community involvement
- Statement of income and expenses, including receipts for any expenses equal to or greater than US$75

If the scholar is studying in a country where the native language is different from his/her own, he/she should provide the summary sections of the report in both languages so as to accommodate the sponsoring Rotarians in both countries.

Your district may require additional reporting documentation as you see fit. Such documents may include a confirmation of costs form to enable you to track living expenses and spending habits in the host country and to help future students budget appropriately. For an example of a

confirmation of costs form, refer to the index of the Ambassadorial Scholar Handbook.

POST-SCHOLARSHIP

It is important for sponsoring Rotarians to keep in mind that although the scholarship period ends, the Rotary-scholar relationship should not. Rotarian sponsors should make sure to get updated contact information from the scholar after the scholarship is complete as well as to invite the scholar to speak about his/her experiences at Rotary club meetings and district conferences.

Being an alumnus of The Rotary Foundation is an honor, but it is also an induction into a global network of contacts who all share the same passion for improving the world. Scholars should send their latest contact information to Alumni Relations at alumni@rotary.org. Staff may feature alumni stories in the *Reconnections* newsletter, invite alumni to the annual convention, and put them in contact with a local active branch of TRF alumni.

FACTS ABOUT ROTARY SCHOLARSHIPS

The Rotary Foundation has a rich history of funding scholarships for undergraduate and graduate study in a wide range of academic fields. Clubs and districts can create their own scholarships and fund them with district grants for any level of studies or with global grants for graduate studies in an area of focus.

District Grant Scholarships

District grants can be used to sponsor secondary school, undergraduate, or graduate students studying any subject, either locally or abroad. In addition, the scholarship may cover any length of time — from a six-week language training program to a year or more of university study. Districts may ask scholars to make presentations to local Rotary clubs and participate in Rotary service projects, but such involvement is not required by the Foundation.

The district is responsible for all administrative support for district grant scholars. No host counselor is provided for international district grant scholars. Districts may request assistance from Rotarians in the area where the scholar will be studying, but those clubs are under no obligation to act as hosts. It is recommended that districts appoint a scholarships subcommittee chair to manage the logistics of identifying and approving candidates, making payments, and coordinating with the district in which the scholar will be studying.

Read more about district grant scholarships.

Global Grant Scholarships

Global grants support scholarships for graduate students studying abroad in one of the six areas of focus. Scholarships range from one to four years and therefore can include an entire degree program. Prospective scholars must show proof of admission to the chosen university before the grant will be approved.

Global grant scholars are expected to participate in club or district activities before, during, and after the scholarship.

Global grant scholarships are funded using cash and/or the District Designated Fund, matched by the World Fund. The global grant budget must total at least US$30,000, but a scholarship may be a component of a larger grant application — for example, a scholarship plus a humanitarian project.

Read more about global grant scholarships.

UNESCO-IHE Scholarships

The Rotary Foundation offers a limited number of scholarships annually for water and sanitation professionals to study at UNESCO-IHE Institute for Water Education in Delft, the Netherlands. Rotary clubs and districts interview applicants who have been admitted to the institute in one of three master's degree programs and recommend scholarship candidates.

Rotary

GLOBAL GRANT SCHOLARSHIPS SUPPLEMENT

The Rotary Foundation funds scholarships with global grants and district grants. This supplement focuses on global grant scholarships. For information about district grant scholarships, clubs should contact their district Rotary Foundation committee, and districts should refer to Lead Your District: Rotary Foundation Committee.

OVERVIEW

Through global grants, Rotarians can support future leaders in fields related to the areas of focus:

- Peace and conflict prevention/resolution

- Disease prevention and treatment

- Water and sanitation

- Maternal and child health

- Basic education and literacy

- Economic and community development

Global grant scholarships fund graduate-level coursework or research for one to four academic years. A key feature of global grants is the partnership between the district or club in the study location (host sponsor) and the district or club in the scholar's home country (international sponsor). Both sponsors must be qualified before they can submit an application.

FINDING AND INTERVIEWING ELIGIBLE CANDIDATES

Global grant scholars plan to pursue a career in an area of focus, and their graduate-level educational goals should support this career interest. Pursuing a career in an area of focus means the scholar has a long-term commitment to measurable, sustainable change. Be sure that a candidate's previous work or volunteer experience, academic program, and career plans are strongly aligned with one of the six areas of focus.

Consider working with universities to identify potential scholars (for example, outstanding graduates of a water engineering program who are seeking funding for graduate study in that field). Universities also can direct Rotary clubs to students who have been accepted into their graduate programs that are relevant to a particular area of focus.

Beyond confirming a candidate's eligibility, the interview enables you to determine whether he or she has:

- Excellent leadership skills and potential

- A proven record of success in his or her academic field or vocation

- A commitment to community service

- Well-defined and realistic goals

- Concrete ideas for advancing within his or her chosen field

- Sincerity about maintaining a lifelong relationship with Rotary after the scholarship period

Districts and clubs may create their own application form, or they may use the sample application provided by the Foundation. Provide the candidate with a copy of the grant terms and conditions and the areas of focus policy statements, and be sure that he or she understands them. If you are uncertain about a candidate's eligibility, contact your regional grants officer.

BEST PRACTICE

- Incorporate the questions from the scholar profile section of the online application into your application and interview process. For your reference, these questions can be found in the Grant Management Manual.

TIMELINE

Global grant scholarship applications are accepted on a rolling basis throughout the year. Applications should be submitted at least three months before the scholar's intended departure date to allow adequate time for Foundation review and processing.

The following is a sample timeline for a district with a candidate who plans to depart on 1 August:

November to March	Organize a selection committee
	Recruit scholarship applicants
	Conduct interviews and select candidates
	Review and confirm selection
March to April	Contact host district to invite participation*
	Identify host sponsor, primary and secondary contacts
	Start application process

	Have candidate complete scholar profile
By 1 May	Submit application to the Foundation
May to July	Grant approved
	Complete legal agreement authorization
	Provide bank information and two signatories
	Provide scholar with letter of financial guarantee
	Receive grant payment
	Transfer grant funds to scholar
	Conduct scholar orientation seminar
1 August	Scholar departs
12 months from payment	Submit progress or final report
2 months after completion	Submit final report

*The district Rotary Foundation committee chair and the district scholarships subcommittee chair in the host location can help you find a host sponsor.

BEST PRACTICE

- Include district leaders in your communications to the host district. If no response is received from the host district after several attempts, contact your regional grants officer.

HOW TO APPLY

Clubs and districts must be qualified before they can apply for global grants. The host and the international sponsor will each appoint a grant committee consisting of at least three Rotarians.

Global grant applications are submitted at www.rotary.org/grants. The sponsor clubs or districts create the initial application, and the scholar candidate then completes the scholar profile online. (Note: the candidate should wait to create an account on Rotary.org until after his or her name and email address have been added to the application by the host or international sponsor.) If the language of the host sponsor country differs from that of the international sponsor country, the application should be completed in each language. If necessary, the candidate can be asked to help translate correspondence between the host and international sponsors. However, he or she should not be asked to identify or initiate communication with a host sponsor district or club.

Candidates must provide proof of university admission at the time of application. Conditional admission is acceptable when the school requires a financial guarantee or completion of undergraduate degree, but it

is not acceptable if admission is contingent on improvement in a language score.

Allow enough time to process the application, which should be submitted at least three months before the scholar's intended departure date. You will need to respond quickly to requests for additional information. Communicate with your partners throughout the application process to ensure that sponsor clubs or districts are maintaining their qualified status and are current on reporting requirements for open grants.

Remind the candidate that a scholarship is not awarded until the Foundation approves the grant. Any expenses incurred before Foundation approval are not eligible for reimbursement.

BEST PRACTICE

- Limit the candidate to one area of focus, and be sure that he or she provides detailed answers to the questions in the scholar profile.

FUNDING AND BUDGET

The minimum budget for a global grant scholarship is $30,000. The Foundation's World Fund provides a minimum of $15,000 and a maximum of $200,000. Clubs and districts contribute District Designated Funds (DDF) and/or cash, and the World Fund matches the amount — 100 percent for DDF and 50 percent for cash. DDF is drawn from the fund for the year in which the application is approved.

The following items are eligible for funding:

- Passport/visa
- Inoculations
- Travel expenses (as specified in the grant terms and conditions)
- School supplies
- Tuition
- Room and board
- Household supplies
- Language training courses (but not if university admission is contingent on improvement of language skills)

The following items are not eligible for funding:

- Expenses incurred before the application is approved

- Furniture, automobiles, bicycles

- Clothing

- Expenses for spouses and dependents

- Housing expenses in the home country during the scholarship period

- Taxes owed as a result of receiving the scholarship

- Medical care

- Entertainment

- Personal travel

- Expenses related to Rotary events

Note: Most personal and miscellaneous expenses are not covered by the scholarship funding.

BEST PRACTICE

- Be sure that the scholar understands which expenses are eligible and which are not. If you are uncertain about the eligibility of a budget item, consult your regional grants officer.

PAYMENT

After the grant application has been approved, you will need to make arrangements to receive the grant payment. First, the host and international sponsors both must authorize the legal agreement form in the online grant application system. (If the grant is club-sponsored, the club president authorizes the agreement; if the grant is district-sponsored, the district Rotary Foundation committee chair provides authorization.)

The sponsors should work together to determine a bank account location (in the scholar's home country or study country), designate two Rotarians as bank account signatories, and complete the information online to receive payment from the Foundation. The bank account name should include the district number for a district-sponsored grant or the club name for a club-sponsored grant. The signatories must be members of the sponsor district or club.

If necessary, provide the scholar with a letter of financial guarantee from the Foundation. Tell the scholar how grant payments will be made, and if they will be in installments, discuss how payments after the initial one will be made.

ORIENTATION

Scholars are required to participate in an outbound orientation session before departure. This process should be managed by the international sponsor. Two options are available, although the first is preferred:

Regional, district, or club orientation

Orientation seminar materials can be provided by your regional grants officer. If a scholar is club-sponsored, the club may hold an individual orientation.

Online self-orientation

An online orientation, accessed through Rotary's Learning Center, may be used if an in-person session cannot be arranged.

BEST PRACTICE

- Arrange for the scholar to attend club meetings, district functions, and other Rotary events before his or her departure.

TRAVEL

The scholar will make travel arrangements through BCD Travel, Rotary's travel partner. Learn more about grant-funded travel.

By booking through BCD Travel, scholars automatically receive insurance coverage that meets Rotary International's requirements. This insurance will be in effect for the duration of the study term. Scholars may choose to purchase additional insurance coverage, but it will not be paid for by the grant.

BEST PRACTICE

- Provide the scholar with information about the Rotary grants travel and insurance policies and be sure that he or she understands them.

HOST COUNSELOR

The host counselor is the primary point of contact for the scholar in the host country. The host sponsor primary contact, listed in the grant application, is assumed to be the host counselor unless a different person is identified. Be sure that the scholar has contact information for the host counselor as well as for the sponsor district or club. Encourage the scholar to introduce him- or herself to the host counselor and to begin corresponding.

The host counselor can assist with:

- Locating housing, particularly if university housing is not available

- Arranging a welcome for the scholar

- Inviting the scholar to club meetings or district conferences

- Encouraging the scholar to participate in local service activities or cultural events

- Providing practical assistance with things like opening a bank account and finding a nearby grocery store

- Managing grant funds

- Publicizing the scholar's activities through the district's newsletter

- Making Rotarians aware of the scholar's availability for speaking engagements

- Encouraging the scholar to join an area of focus-specific Rotary scholars group on Facebook

At the end of the scholarship period, the host counselor should meet with the scholar to see that all necessary closing tasks have been completed (for example, housing and bank accounts). The host counselor should also maintain communication with the scholar and ensure that his or her contact information is updated.

BEST PRACTICE

- Maintain frequent communication with the scholar and provide opportunities for him or her to be involved in Rotary activities.

REPORTING

The host and international sponsors are both responsible for reporting on the use of scholarship funds. Progress reports must be submitted within 12 months of receiving the first grant payment. Final reports must be submitted within two months after the end of the scholarship period. Either the host or international sponsor must initiate the report in the online grant system. The sponsors and the scholar complete the appropriate portions of the report.

The report summarizes the scholar's studies or research, the relationship to the selected area of focus, and the scholar's Rotary and community involvement. It also includes a statement of income and expenses. The scholar must provide receipts for any expense of $75 or more. The sponsor district or club may set up additional reporting requirements as it sees fit.

If the language of the host sponsor country differs from that of the international sponsor country, the report should be completed in each language.

BEST PRACTICE

- For scholarships that pay for more than tuition, create a spreadsheet to track all expenditures, and have the scholar update it frequently throughout the scholarship period.

POST-SCHOLARSHIP

Although the scholarship period ends, the Rotary-scholar relationship should not. Stay up-to-date with contact information and invite the scholar to speak about his or her experiences at Rotary club meetings and district conferences. Encourage the scholar to participate in Foundation alumni activities in his or her local district after the scholarship period. And if the scholar hasn't done so already, encourage him or her to join an area of focus-specific Rotary scholars group on Facebook.

BEST PRACTICE

- Direct the scholar to the alumni resources available at www.rotary.org/alumni.

GLOBAL GRANT SCHOLARSHIP CANDIDATE APPLICATION TEMPLATE

This application may be used by clubs and districts to select global grant scholarship candidates. Scholar candidates should complete all sections of the application and return it to the sponsoring Rotary club or district.

PERSONAL INFORMATION

First name: _____

Family name: _____

Citizenship: _____

Date of birth: DD-MM-YYYY

Gender: ☐ Male   ☐ Female

CONTACT INFORMATION

Email address: _____

Street address or P.O. Box: _____

City: _____

Postal code: _____

Country: _____

Primary telephone: _____

Secondary telephone: _____

LANGUAGE SKILLS

List all the languages you speak, including your native language:

Language	Written Proficiency	Spoken Proficiency

EMERGENCY CONTACT INFORMATION

First name: _____

Family name: _____

Relationship: _____

Email address: _____

Street address or P.O. Box: _____

City: _____

Postal code: _____

Country: _____

Primary telephone: _____

Secondary telephone: _____

PRIOR EDUCATION

List the two educational institutions you have most recently attended.

Most recently attended:

Name of institution: _____

Degree received: _____

Place of study: _____

Field of study: _____

GPA: _____

Previously attended:

Name of institution: _____

Degree received: _____

Place of study: _____

Field of study: _____

GPA: _____

SUMMARY AND OBJECTIVES

In 2-3 short sentences, tell us your objectives for this scholarship (program of study/degree sought, <u>Rotary area of focus</u>, etc.).

In 200 words or less, please summarize your qualifications to receive this scholarship. (volunteer/work/academic experience, philosophy and perspective, etc.)

AREAS OF FOCUS

What is your area of focus?

☐   Peace and Conflict Prevention/Resolution

☐   Disease Prevention and Treatment

☐   Water and Sanitation

☐   Maternal and Child Health

☐   Basic Education and Literacy

☐   Economic and Community Development

Which goals of your selected area of focus will your scholarship activities support? Refer to the Areas of Focus Policy Statements for more information.

How will you meet these goals?

SCHOLARSHIP INFORMATION

Provide the following information about the academic program you plan to attend:

Name of institution: _____

City: _____

Language of instruction: _____

Website: _____

Academic program: _____

Academic program start date: DD-MM-YYYY _____

Academic program end date: DD-MM-YYYY _____

Planned departure date: DD-MM-YYYY _____

Planned return date: DD-MM-YYYY

List the classes you plan to take and provide any relevant links to information about the program. Explain how the program and courses align with Rotary's goals in the selected area of focus and your future career plans.

How does your previous and current educational, professional, and/or volunteer experience align with Rotary's goals in the selected area of focus (500 words or less)?

What are your professional and/or academic plans immediately after the scholarship period (500 words or less)?

How do your long-term professional goals align with Rotary's goals in the selected area of focus (500 words or less)?

BUDGET

Select the local currency for your budget and enter the current rate of exchange to 1 U.S. dollar.

Local currency: Exchange rate to 1 USD:

Detail your proposed expenses. Note that the total budget must be equal to the total financing of your scholarship grant amount. Attach any documents, such as price sheets, bids or estimates, to support the expenses listed.

#	Description	Category	Local cost	Cost in USD
1:	Tuition & fees	Tuition		
2:	Local housing	Accommodations		
3:	Books	Supplies		
4:	Food	Supplies		
5:	Airfare	Travel		
6:	Consular/visa fees	Travel		

|			
7:	Local transportation	Travel	
8:			
9:			
10:			
11:			
12:			
13:			
14:			
15:			
Total budget			

FINANCING

The scholarship amount is US$XX,XXX.   You are personally responsible for all expenses in excess of the scholarship amount. Please list and describe your sources and sufficiency of addition funds that will cover the balance of your budget:

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL

GLOBAL SCHOLARSHIP GRANT - TRF APPLICATION
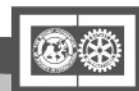
The TRF online application for the Global Scholar Grant will ask for the following information. Prepare answers to each of these questions and submit this information to the Global Scholarship Grants Subcommittee before beginning the online application process.

OBJECTIVES

In a few short sentences, tell us your objectives for this global grant.

Who will benefit from this global grant?

What are the scholar's estimated travel dates?

How did you select this candidate?

In what ways is this candidate qualified to receive a global grant scholarship?

AREAS OF FOCUS

Global grants must support the goals of at least one of Rotary's areas of focus. You will be asked to select the applicable area of focus and the goals that your activity will support.

How will you meet these goals?

PARTICIPANTS

Global grant committee
Identify the Rotary club or district in the country or geographical area where the activity will take place (primary host sponsor) and a Rotary club or district outside of that country or geographical area (primary international sponsor). Each sponsor must establish a three-person grant committee and one individual on the grant committee must be designated as the primary contact.

List the members of the global grant committee and disclose any potential conflict of interest within the committee.

Scholarship candidate
Provide contact information for the scholarship candidate.

Host counselor
The host counselor provides support for the scholar before and during the scholarship period. Identify the individual who will serve as host counselor for this scholarship.

Partners
List any additional partners who will participate. This may include Rotary clubs, Rotaract clubs, Rotary Community Corps, or individuals.*

Rotarian participation
Describe the role of the host Rotarians in this activity and list their specific responsibilities.

Describe the role of the international Rotarians in this activity and list their specific responsibilities.

BUDGET

Detail the proposed expenses for your activity, such as accommodations, equipment, supplies, monitoring and evaluation, operations, personnel, project management, publicity, signage, travel, tuition.

Upload any documents, such as price bids or pro forma invoices, to support the expenses listed.

FINANCING

List all funding sources.

SCHOLARSHIP CANDIDATE PROFILE

Personal information

Contact information

Emergency contact information

Insurance
Insurance carrier name

Policy number

Phone

Prior education
List the two educational institutions you have most recently attended, and the degree received, place of study, and field of study for each.

Language skills
List all languages you speak, including your native language.

Scholarship information
Provide the following information about the academic program at the institution you plan to attend.

Name of institution

City

Country

Language(s) of instruction

Website

Course of study

Dates of study

List the classes you plan to take and any relevant links to information about the program.

How does your educational, professional, or volunteer experience align with Rotary's goals in the selected area of focus?

What are your plans immediately after the scholarship period?

How do your long-term professional goals align with Rotary's goals in the selected area of focus?

Upload your proof of admission in PDF fo