

# 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 ELIGIBILITY

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:
  - 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.
  - 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](mailto: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.



# 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](http://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](http://www.rotary.org/alumni).