

District 6950 District Simplified Grants Policies and Guidelines

District Simplified Grants support the service activities or humanitarian endeavors in which the District wishes to engage. Each grant must adhere to the grant policies which govern all TRF grant programs and respect the wishes of the receiving community. All sponsoring clubs and projects must be located within District 6950.

Appropriate Grant Implementation

Requirements

1. All grants from The District Simplified Grants (DSG) committee must:
promote active and personal participation of Rotarians. Suggested activities area:
 - Assessing the community needs and developing a project plan;
 - Establishing a committee containing at least three Rotarians to oversee the expenditure of funds;
 - Oversight of Grant Funds;
 - Involving Rotarians in the implementation of the project;
 - a Providing evidence of community involvement and ownership;
 - Organizing meetings with local service providers, local officials, and/or recipients; and
 - Promoting projects in the local media.
- a assist in the development of stronger Rotary networks as clubs work together to implement projects that have been initiated by a Rotary club in the project location. Projects which receive DSG support should satisfy real humanitarian and educational needs of the receiving community, which must be within District 6950;
- not involve the establishment of a permanent foundation trust or permanent interest-bearing account. *Grant projects can involve the establishment of a revolving loan fund, but must include training and detailed information regarding recipient payback schedules;*
- not directly benefit a Rotarian; an employee of a club, district or other Rotary entity, or of Rotary International, or a spouse, lineal descendant (child or grandchild by blood or legally adopted child), a spouse of a lineal descendant, or an ancestor (parent or grandparent by blood) of any living Rotarian or Rotary employee;
- not duplicate any existing Rotary Foundation or other Rotary-sponsored programs;
- exclude any liability to The Rotary Foundation, Rotary International, and the District, except for the amount of the grant;
- be properly submitted, thorough, and fully completed; if these conditions are not met, the application will be returned with explanation;
- be consistent with the criteria, procedures, and policies of the Polio Plus program, the World Health Organization, and local Health Departments for projects involving vaccines and immunizations;
- Attempt to create publicity that gives Rotary a positive public image and embellishes the ideals of the understanding, peace, and good will.

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The Rotary emblem must be permanently and prominently displayed on all projects. DSG project funds cannot be used for this signage.

- a not be used to reimburse clubs/districts for projects already undertaken and in progress, an existing project, activities primarily sponsored by a non-Rotary organization, or for projects that are already completed. The Foundation will only fund projects that have been reviewed and approved by the District DSG Select Committee prior to their initiation. Projects that are renewed each year that benefit different recipients (such as the Dictionary Project) are eligible for USC.

2. *Grant Fund limitations*

Grant funds cannot be used:

- for purchase of land and buildings. If the grant depends upon the construction of a building, the construction must be funded by additional (that is non-matched) club/district funds or funded by a cooperating organization. The GSC will not release grant funds until such construction is completed.
- for construction of any structure in which individuals live, work or engage in any gainful activity such as buildings, containers, and mobile homes or structures where individuals carry out any type of activity including manufacturing, processing, maintenance and/or storage. The only exception to the above guidelines is the funding of low cost shelters for extremely underprivileged families. Construction of infrastructure such as service roads, wells, reservoirs, dams, bridges, latrines, toilet blocks, and water supplies and other similar structures is acceptable.
- for renovation of structures, including the provision of new services or upgrade of utilities (i.e. electrical & plumbing), in which individuals live, work or engage in any gainful activity such as buildings, containers, and mobile homes or structures where individuals carry out any type of activity including manufacturing, processing, maintenance and / or storage.
- for salaries, stipends or honorariums for an individual or individuals working for a cooperating organization or beneficiary;
- to support the operating or administrative expenses of any organization;
- for post-secondary education activities, research, or personal or professional development;
- for excessive support of any one beneficiary, cooperating organization, or project;
- for international travel expenses of any kind except where expressly permitted;
- for the construction of Habitat for Humanity houses or Low Cost Structures;
- a revolving loan or microcredit program:

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Standard Grant Policies

1. Reporting requirements

- Failure to provide acceptable reports on previous District Simplified project grants in a timely manner may result in the sponsor club being ineligible for future project grants for two (2) years, and may result in the sponsor club having to return all funds to the District Simplified Grant Account, through the DSG Committee.
- On projects that extend more than four (4) months from the date of issuance of project grant funds, the sponsor must submit an interim report to the DSG committee chairman by the end of the five (5) months from the date of issuance of project grant funds. This report should include a brief financial summary to date, a summary of what has been accomplished, and an estimate of when the work will be completed.
 - a. Final reports must be submitted to the DSG committee within one (1) month of completion of the project.
- Sponsors must meet all preconditions for payment six (6) months from the date of the project grant announcement or the DSC project will be terminated.
- Sponsors must begin projects within three (3) months of the release of payment installment or the project grant will be terminated and funds must be refunded to the District Simplified Grant Account, through the DSG Committee.

2. Cooperating Organizations

A grant conducted in cooperation with another non-Rotary organization must meet the following conditions:

The Rotary sponsor(s) must clearly demonstrate that the project is initiated, controlled and conducted by the Rotary club(s); Rotarians must participate in giving their time, resources, and personal involvement to the project.

- The local Rotary clubs or sponsoring club must have knowledge and provide a letter of endorsement for the non-Rotary organization as reputable and responsible, and have determined that the organization is registered and acts within the laws of the project country
- The non-Rotary organization cooperating in such projects must agree to participate and cooperate in any financial review of activities connected with the project.
- An annual limit of eight grants can be made in cooperation with another organization.

3. Stewardship of Rotary Foundation funds

Rotarians have entrusted The Rotary Foundation with their contributions with the faith and understanding that they will be used effectively and for the purposes for which they were given. All involved clubs, districts and others associated with the project are expected to:

- a. Treat Rotary Foundation's DSG funds as a sacred trust to be constantly safeguarded from loss, misuse, or diversion and to be used only for the stated purpose, which shall be strictly interpreted;

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- b. Assure competent and thorough oversight of the project with clear delineation of responsibility, which assumes the utmost care given to even the appearance that Rotary Foundation funds are being used in an improper manner;
- c. Conduct all financial transactions and project activity relating to the grant at least at the level of standard business practice and always in consonance with the “Declaration of Rotarians in Business and Professions” and in the full spirit of the Four Way Test:
- d. Report immediately any irregularity in grant-related activity to the DSG Committee Chairman, who is expected to immediately notify the Deputy Area Governor for Effective Service;
- e. Implement projects as approved by the DSG \ Committee in their grant award. Any deviation from the agree terms or changes in the implementation of the project must receive prior written authorization from DSG Committee.
- f. Arrange for independent financial and performance reviews and/or audits in accordance with current Trustee policy and guidelines:

4. *Use of the Rotary name and Emblem*

The following guidelines on the use of the “Rotary” name and emblem are RI policy. They must be followed when naming a project in any literature that is developed.

THE ROTARY NAME:

The RI Board has determined that any use of the “Rotary” name without a further qualifier, such as the name of a Rotary club or a Rotary district, refers to the international association, RI.

- New project names or programs not under the exclusive control of RI. when using the name, “Rotary.” must include the name of the participating Rotary club(s) or district(s) and should not use the name. “International.”
- If using the words. “Rotary,” and “Foundation.” these words must not appear together, but must be separated by additional identifying information, such as the name of the participating Rotary club(s) or district(s).
- On going programs not under the exclusive control of RI and not conforming to these guidelines should be renamed to provide this additional identifying information (i.e. the name of the participating Rotary club(s) or district(s) must he included when using the name “Rotary).
- The naming of any project that does not conform to the guidelines must receive specific RI Board approval.

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THE ROTARY EMBLEM:

- The Rotary Emblem, like the Rotary Name, represents the international association, RI.
- Whenever the Rotary Emblem is used for a project, program or activity not under the exclusive control of RI, the name of the participating club(s) or district(s) should also be used in addition to the emblem; should appear directly adjacent to the emblem; and be of a size of equal prominence to the emblem.
- Any reproduction of the Rotary Emblem must meet RI's proper emblem specifications.
- Camera-ready art can be obtained through your Club and District Administration Supervisor
- No alterations, modifications or obstructions of the Rotary Emblem are permitted. The emblem must be faithfully reproduced and always appear in its entirety.
- The RI Bylaws discourage any joint use of the RI Emblem with the emblem or logo of another organization ("The use of such name, emblem, badge or other insignia in combination with any other name or emblem is not recognized by RI.")