

Rotary District 5010 Participation in Programs of The Rotary Foundation Policy

Rotary District 5010 is committed to the full participation and active support of The Rotary Foundation (TRF) by its clubs and Rotarians. The purpose of this policy is to ensure the most effective support of TRF, management of TRF programs, and the stewardship of Foundation funds in District 5010.

I. TRF Contributions and Program Participation

All District 5010 clubs will contribute annually to The Rotary Foundation and may participate in all programs of The Rotary Foundation applicable to their clubs, unless otherwise restricted, as outlined below.

Selection for club participation in District components of TRF programs, including allocation of District Designated Funds (DDF) for grants, will be determined by District 5010 leadership using a number of factors. This includes active promotion of TRF programs and contributions in the club and by Rotarians of that club, performance of the club, and compliance with the rules of programs of TRF.

II. District Goals

Specific goals and/or program focus for TRF participation will be designated each year by the Governor (DG) and District Rotary Foundation Chair (DRFC). These may be recommended by the applicable District 5010 Foundation Subcommittee Chairs (DRFSC). Specific goals for District-level participation in programs of TRF will also be established annually for each program area by the DRFSC and approved by the DRFC. Refer to the current year's District Simplified Grant Application Instructions for project eligibility requirements.

III. District 5010 Program Administration

District 5010 may establish additional requirements at any time to ensure proper management and stewardship of funds of TRF by District 5010 and its clubs. District clubs must be in compliance with overall rules of TRF programs at all times.

The DG and DRFC, with the recommendations of the DRFSC, may establish additional policies for district management of specific TRF programs. These policies cannot conflict with the overall policies established by TRF. The DRFC will oversee overall administration of District 5010 TRF contributions and programs in District 5010 with the management of specific programs conducted by the respective Subcommittee Chairs.

IV. TRF Grant Programs in District 5010

A. DDF Approval

In general, DDF requests by District 5010 clubs for grants will be reviewed and approved using criteria that includes, but is not limited to:

- 1 Compliance with rules and guidelines for TRF programs.
- 2 Active support by club and club members with contributions to TRF .
- 3 Amount of the contribution from the club, Rotarians or other club-generated funds toward the support of grant projects sponsored by the club, and active hands-on participation by members in the project. A minimum of 10% of the project total for contributions by the host club is the guide for MGs and 50% Rotarian-generated contributions for DSG.
- 4 Availability of District Designated Funds.

B. Process Requirements

- 1 A club may request DDF for up to a 100% match for District club and/or Rotarian contributions. The maximum percentage of match that will be considered is outlined on **Exhibit A**. A District 5010 club sponsor must initiate request for DDF.
- 2 Reporting on TRF grant must be current: A.) Reports on Matching Grants must be made at least every 12 months for the life of the project with final reports submitted within two months of project completion; B.) District Simplified Grants must be completed with final reports submitted within one month and preferably within the Rotary year in which the funds are received.
- 3 Clubs must be registered as a non-profit organization and have a bank account to receive grant funds.
- 4 Club and Rotarian contributions for Matching and 3-H Grant sponsorships or other grants administered by TRF will be sent by clubs to TRF for processing to ensure receipt of TRF "credit" for the club and individual Rotarian contributions.

C. Management and Decisionmaking

- 1 The DRFC, with recommendation from District Grants Sub-Committee Chair (DGSC), may restrict grants of clubs or determine other requirements for the completion of projects based on the number of grants currently in process at a club or the past performance of the club.
- 2 The DG and DRFC, with the recommendation of the (DGSC) may establish additional policies for clubs to ensure proper handling of funds and projects of TRF.

Exhibit A

DDF Funding Levels For Grants

Minimum funding for DSG grant is \$500 with a maximum of \$3,500 for *non-rural* projects and \$7,500 for joint club *rural* projects. Maximum DDF funding for a Matching Grant is \$10,000.

Calculate the amount of funding (up to the maximum allowable) that your club is eligible for:

- Club contributions to the Annual Program Fund average \$100+/year/member = 100% of requested DDF
- Club contributions to the Annual Program Fund average \$50-\$99/year/member = 50% of requested DDF
- Club contributions to the Annual Program Fund average \$25-\$49/year/member = 25% of requested DDF
- Club contributions to the Annual Program Fund average \$24 or less/year/member = 20% of req.

*Numbers from the TRF report for the previous Rotary fiscal year will be used to calculate the payments above. Only cash contributions to the Annual Program Fund will be counted. Contributions to the grant, Permanent Fund, or Polio Plus is not counted. Commitments to Benefactor or Bequest Society or award of Paul Harris Recognition Points do not count toward cash contributions for the Annual Program Fund. Consult with your Club President or Foundation Chair to determine what your club's average contributions are to the Annual Program Fund. No club would be excluded from the grant process.