

Matching Grants Seminar

Saturday, June 7, 2008



Learning Objectives

- ★ Overview of the MG process including minimums and timelines
- ★ Completing application, step-by-step
- ★ Funding your project
- ★ Stewardship and reporting



What are Matching Grants?

Matching funds are distributed by The Rotary Foundation in the form of grants to assist Rotary Clubs in carrying out one-time-only humanitarian service projects in cooperation with Rotarians in another country.



District 5340 Project Statistics

Prior three years	AVG
Projects	40
Countries Served	17
Participating clubs	34
Club funds raised	445k
TRF	397
DDF	126
Total Budget	1.07mil

Does not include last year's statistics



Philosophy Behind Grants

Build relationships between Rotarians around the world by implementing **sustainable projects** that meet real needs of the receiving community.

Teach them how to fish

VS

Give them a fish



Guidelines

- ✦ Humanitarian Need
- ✦ Involves at least 2 Countries
- ✦ Must Benefit community and at least 6 People
- ✦ Significant Rotarian Involvement
- ✦ Visible Rotary Identification
- ✦ No Endowment
- ✦ No Direct Rotarian Benefit
- ✦ No Duplication of Rotary Projects
- ✦ No Liability



Overview of Process

- ✦ Project Design
- ✦ Application
- ✦ Decision
- ✦ Implementation
- ✦ Reporting
- ✦ Closure



Matching Grant uses:

- ✦ Agriculture
- ✦ Water
- ✦ Medical care/equipment
- ✦ Combating diseases
- ✦ Help the disabled
- ✦ Literacy and numeracy
- ✦ Educational / occupational training



Can Not Be Used For

- ✦ Construction/renovation*
- ✦ Purchase of land or buildings
- ✦ Salaries*
- ✦ Cooperating organization expenses
- ✦ Post-secondary education
- ✦ International travel*
(except Volunteer Service and 3-H Grants)

*Exceptions: GUIDE TO MATCHING GRANTS,
CHAPTER 1, Page 4



Exception ~ Construction

- ✦ NO ~ Construction or renovation of any structure in which individuals live, work, or engage in any gainful activity.
- ✦ YES ~ Construction of infrastructure such as service roads, wells, reservoirs, dams, bridges, latrines, toilet blocks, water supplies, and other similar structures.



SALARY

- ✦ NO~ Salaries for individuals working for another organization
- ✦ YES ~ Short-term and/or **contracted labor** for project implementation



Terminology you should know

- ☀ Host Club ~ Rotary Club located in project country
- ☀ International Club ~ the primary funding club
- ☀ DDF ~ District Designated Funds match
- ☀ TRF ~ Match from The Rotary Foundation
- ☀ **Beneficiary:** the recipient of goods or services
- ☀ **Cooperating organization:** an organization that is directly involved in the implementation of the project, offering technical expertise and project coordination



Cooperating vs. Beneficiary

- ✦ A **cooperating organization** is directly involved in the implementation of the project, offering technical expertise and project coordination.
- ✦ A **beneficiary** is the recipient of goods or services.



Types of Matching Grants

- ★ Competitive Matching Grant
 - Grant Requests from \$25,001 to \$150,000
 - Mandatory Board of Trustees approval
 - Application deadlines July 1 & December 1
 - TRF Reviews in the fall and spring
- ★ Major Matching Grant
 - Grant Requests from \$5,000 to \$25,000



TRF Deadlines

- ✦ Subcommittee Chair (DGSC) must review and sign application prior to submission to TRF (District review deadline Feb 28)
- ✦ Last submission to TRF forwarded by March 31
- ✦ Applications approved 1 Aug - 15 May



District 5340

Application Deadlines

- ☀ Applications received 1 July – 28 February to allow final review before submitting to meet March 31st deadline
- ☀ Limited to **\$4,000 DDF per project** and **\$4,000 per club** on first come first served basis
- ☀ Remaining DDF funds will be made available for a second round of applications using the same rules – January 1st . Second round projects must be submitted for review by the 28th of February






Hint:

Almost 50 percent of all Matching Grant applications are submitted in March. To avoid delays associated with this time period, submit your applications early in the Rotary year.





Where does the Matching Funding come from?

District and Rotary Foundation Matching is funded by **annual gifts**.





"It's a universal law-

We have to give before we get.

*We must plant the seeds before we reap
the harvest.*

The more we sow, the more we reap.

*And in giving to others, we find ourselves
blessed. “ ~ Wayne Dyer*



The SHARE System

Foundation Programs

PolioPlus,
3H Grants,
Matching Grants

The Rotary Foundation

The Permanent
Fund

Annual Gifts are invested by The Rotary Foundation for 3 years. During this time, the earnings are used to operate The Rotary Foundation.

Donors get Paul Harris Credit recognition for Annual Giving.

Donations to The Rotary Foundation are made by individuals.

They do not need to be Rotarians.

3 Years

(D)

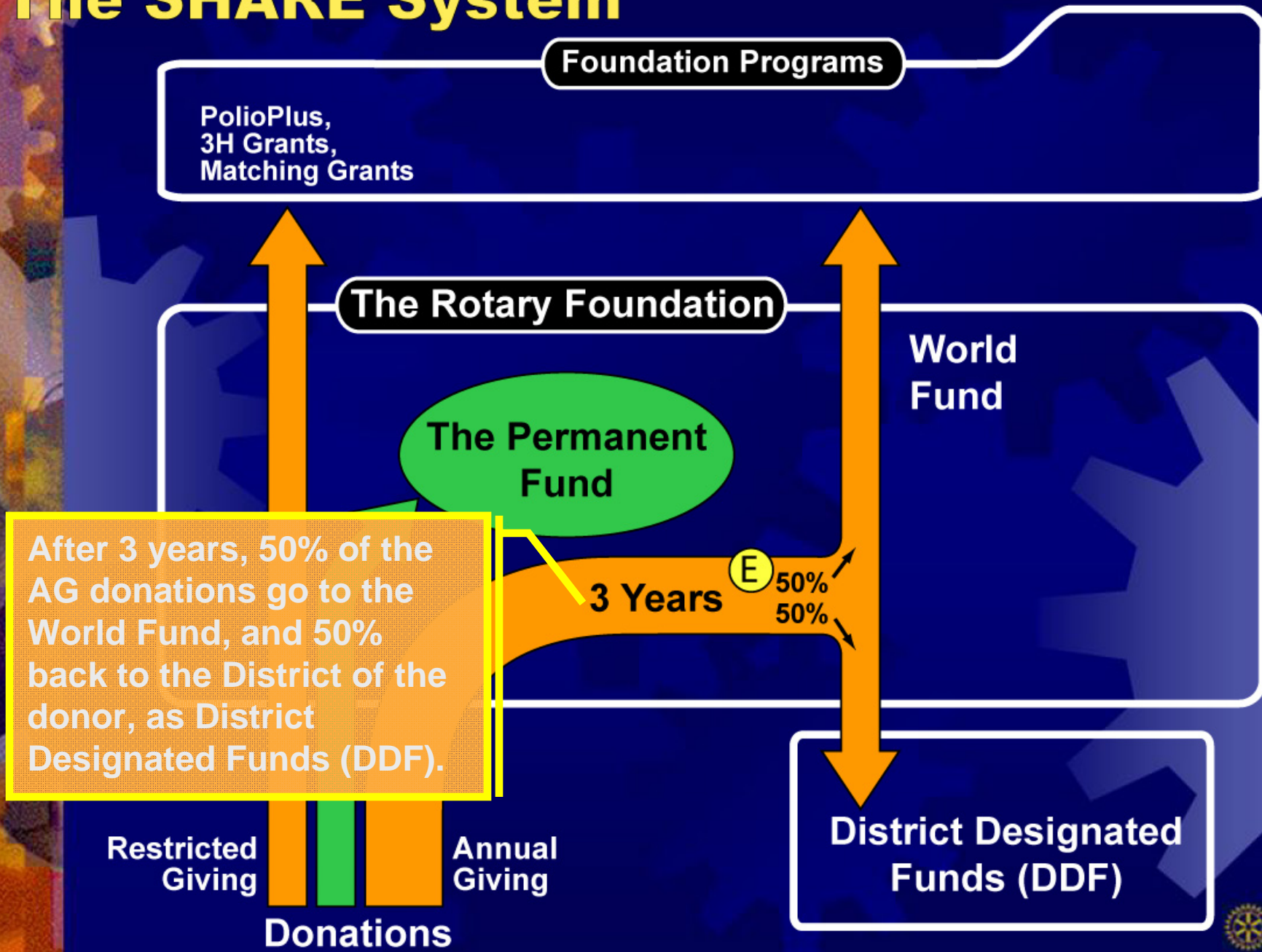
Restricted Giving

Annual Giving

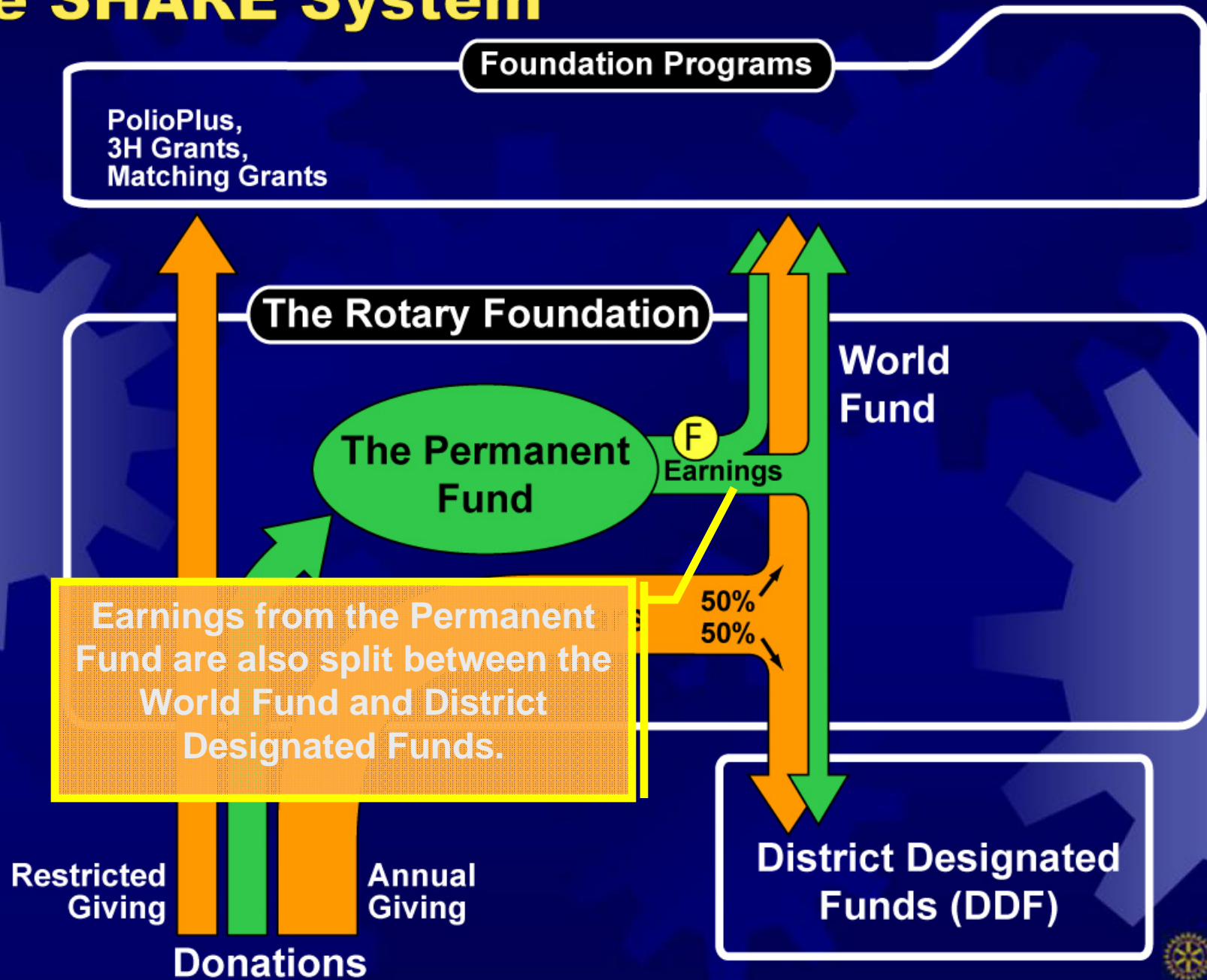
Donations



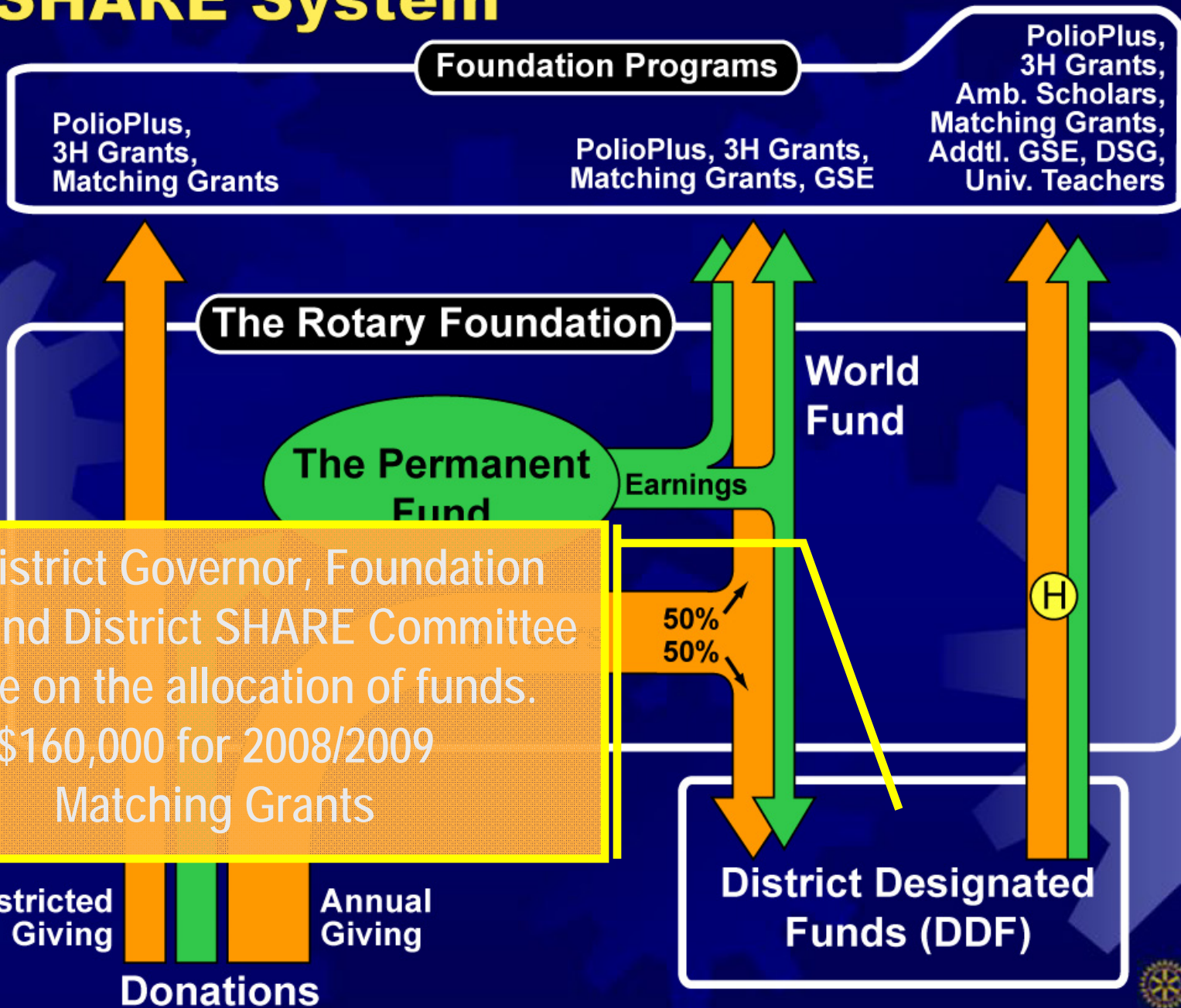
The SHARE System



The SHARE System

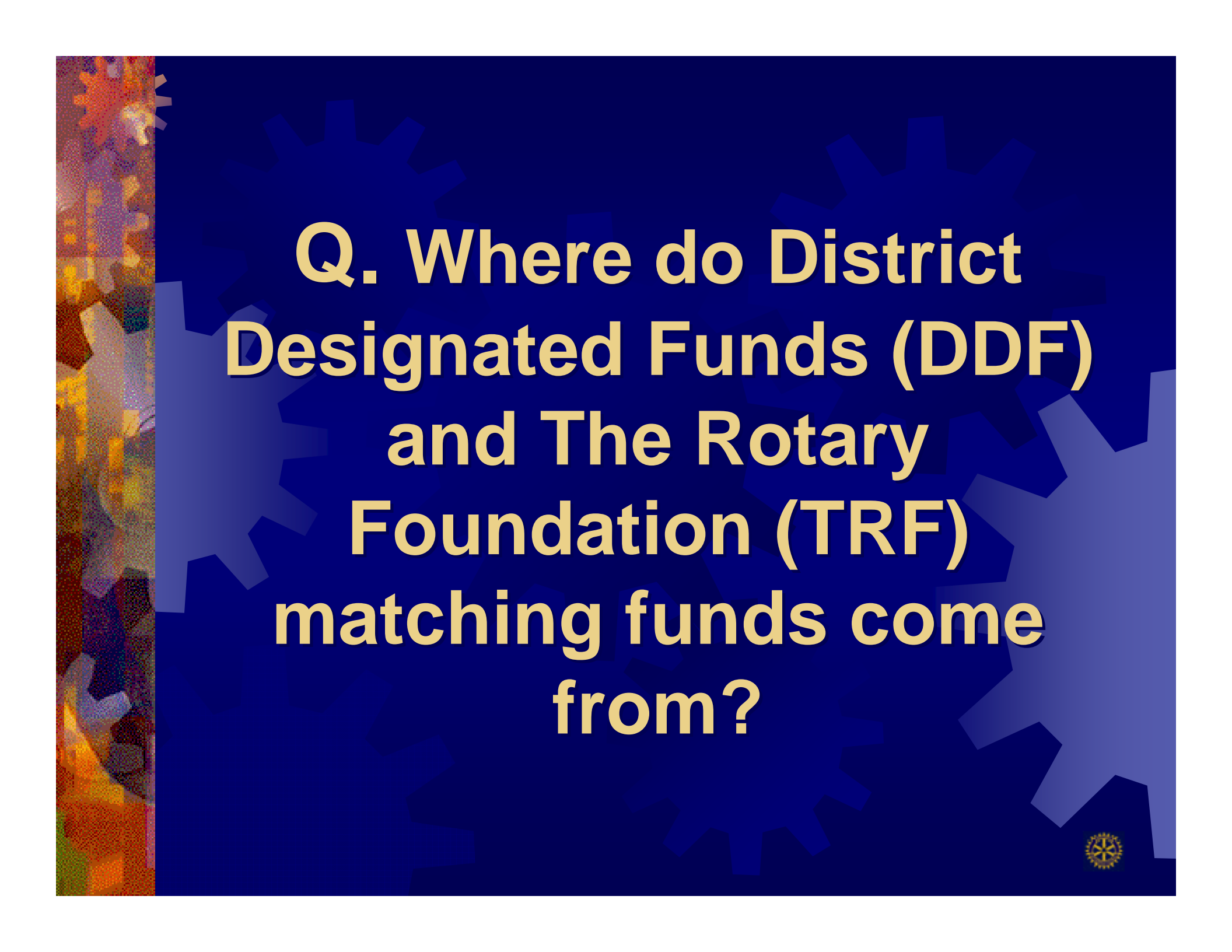


The SHARE System



QUIZ





**Q. Where do District
Designated Funds (DDF)
and The Rotary
Foundation (TRF)
matching funds come
from?**



THEY COME FROM US!

- ★ Annual donations made **three years** ago provide the funds for DDF and TRF matches



District 5340 ~ DDF Matching

1 to 1 matching to club with limits:

- ✦ Maximum of \$4,000 per year per club
- ✦ Maximum of \$4,000 per project
 - ✦ \$160,000 in DDF for 2008/2009
(40 projects at the maximum)



The Rotary Foundation ~ TRF

- ★ 50 cents to the dollar for **Club** contributions
- ★ \$1 for each dollar **DDF** (District Designated Funds)



Minimum Guidelines

- ✦ Minimum match request from TRF is \$5,000
- ✦ Minimum contribution of \$100 from **host partner in project country**
- ✦ Must benefit at least **6** people
- ✦ Project committee with 6 people ~ 3 from Host Club and 3 from primary International Club



Project with Minimum TRF Match of \$5,000

- ★ \$11,700 total expenditure
 - \$3,300 in District 5340 Club
 - \$100 host club
 - The remainder ~ \$8,300 comes from District and The Rotary Foundation Matches



Example



Jamaica \$11,700

- Medical Clinic
 - 634 people received medical exams & medicine ~ \$3,500
 - Follow-up to distribute Glasses to those who needed them ~ \$1,800
- Education Center ~ \$6,400
 - group study tables, 5 computers, one laptop with overhead projector, 1 laser and 1 ink jet printer



Minimum Grant: TRF \$5,000

Clubs



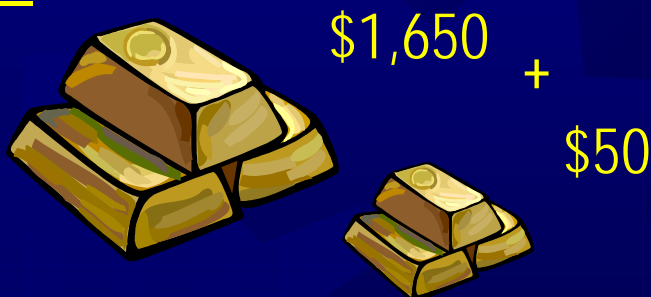
District DDF



50% Club

100% District

TRF



Clubs \$3,400 + DDF \$3,300 + TRF \$5,000 = Total: \$11,700



Minimum Grant Summary

Clubs

• Primary Host Sponsor Rotary Club	\$ 100
• Primary International Sponsor Rotary Club	<u>\$3,300</u>
	\$3,400

Districts

• District 5340 Match at 100% for Int'l club only	\$3,300
• <u>No</u> Host Club District Match	<u>\$ 0</u>
	\$3,300

TRF

• \$5,000 requested from the Rotary Foundation	
• 50% match for giving from both clubs	\$1,700
• 100% for District Designated Funds	\$3,300

Total \$11,700



Jamaica Project used less than Maximum \$4,000 DDF

- ★ \$700 of DDF still available to this club
- ★ Options:
 - ★ Create a second project and seek additional funding from another club
 - ★ Donate \$700 & remaining match to another club



Club exceeds Maximum

Clubs

\$5,000 + \$100



Districts

\$4,000 + \$200



50%

\$2,500 + \$50



TRF

100%

\$4,000 + \$200




\$5,100 + \$4,200 + \$6,750 = \$16,050



Preparations

- ✦ Read Matching Grant application and The Guide to Matching Grants
- ✦ Identify international partner
- ✦ Conduct community needs assessment (if you are developing a new project)
- ✦ Design eligible project to meet need





Establish Effective Communication Channels

- ✦ Get to know project partners
- ✦ Anticipate cultural misunderstandings
- ✦ Discuss problems openly and freely
- ✦ Communicate in a timely manner
- ✦ Practice patience and good humor



How do I find a project

☀ Go online

- District Website: www.matchinggrants.org
- Rotary International Website:
www.rotary.org/programs/wcs/projects/database.html

☀ Ask

- People who traveled to developing countries
- District Foundation People
- GSE and Ambassadorial Scholars



How do I find a partner?

- ☀ Let one find you
 - ☀ Post your project on District Website www.matchinggrants.org or
 - ☀ OR, at Rotary International Website: www.rotary.org/programs/wcs/projects/database.html
- ☀ Look for a club in Host country
 - ☀ Club locator at www.rotary.org
 - ☀ International Convention
 - ☀ Directory



Effective Partnership Recap

- ★ Strong partnerships
 - Knowledgeable and motivated partners (host and international)
 - Clear and open lines of communication
 - Clearly defined responsibilities
 - Mutual respect
- ★ Detailed plan of action with goals and anticipated outcomes
- ★ Proper fiscal oversight
- ★ HOST CLUB
 - Proximity to project for project oversight
 - Capacity to assist in implementation
 - Local connections to resources and people
 - Assistance with clearing customs



Post Project to District Web

- ★ Complete MG Application online
 - ★ matchinggrants.org/new.html
 - ★ Save grant password
- ★ Use District Grant number for all communication with DGSC (District Grants Sub-Committee Chair) until Matching Grant number is assigned




Information Needed for Posting

- ✦ One paragraph with compelling description of project and expected outcomes
- ✦ Identity of primary clubs involved
- ✦ Draft Budget
- ✦ Known funding sources



Project Description

- ☀ Who, what, where, when and how in one paragraph
- ☀ Continuity of project after the grant – How will it be sustained?
- ☀ Detailed description of Rotarian activities

 **Matching Grant Application**
The Rotary Foundation (TRF) 1

PROJECT DESCRIPTION

Explanation: Matching Grants support the humanitarian service projects of Rotary clubs and districts. In this section, describe in detail the humanitarian need your project will address, the intent of the project, how the project will be implemented, and how Rotarians will be directly involved in the project. Involvement is required of both the host and international partners.

Please provide the name of the project site, the city or village, state or province, and country. List multiple locations, if applicable.

Project site _____
City/Village _____
State/Province _____
Country _____

Describe the project and the problem or need it will address, including the intended beneficiaries and how the project will benefit the community in need. Provide the estimated length of time needed to complete the project.

Describe how the benefiting community will maintain this project after grant funding has been fully expended.

Describe specific activities of the host and international partners in implementing the project. What will the Rotarians who are members of the partner clubs do during the project? Please note that financial support is not considered active involvement. (See the Matching Grant application instructions for suggestions.)



Host & International Partners

- ☀ Identify Club & District
- ☀ Provide all contact information for committee members
- ☀ All contacts must be in primary sponsoring clubs
- ☀ One Page for Host and one for International Club

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HOST PARTNER

Explanation: The host partner is the club or district in the project country. A committee of at least three Rotarians must be established to oversee the project. The primary project contact must be a member of the primary club identified below. The project committee must be composed of members of the sponsor Rotary clubs for club-sponsored projects or district for district-sponsored projects. The committee members must be committed for the duration of the grant process. Please provide the primary address for all committee members, as all Rotary information will be sent to this address. It is highly recommended that the primary contact (who receives all information from TRF) have an e-mail address to expedite communication.

Primary Club/District

Club _____ Club ID number (if known) _____
District _____ Country _____

Primary Contact:


Name _____ Member ID _____
Club _____
Rotary position _____
Address _____
City _____
State/Province _____ Postal code _____ Country _____
E-mail _____
Home phone _____ Office phone _____ Fax _____

Project Contact #2:

Name _____ Member ID _____
Club _____
Rotary position _____
Address _____
City _____
State/Province _____ Postal code _____ Country _____
E-mail _____
Home phone _____ Office phone _____ Fax _____

Project Contact #3:

Name _____ Member ID _____
Club _____
Rotary position _____
Address _____
City _____
State/Province _____ Postal code _____ Country _____
E-mail _____
Home phone _____ Office phone _____ Fax _____



District and Member Contact Information

For District 5340 Log into the Directory

- ★ To Find Club Number

Open club listing and look in web address. For example:
In the link below for Mission Bay, the club = 930 so 930 is the club number

<http://www.rotary5340.org/dir/genclb2.cgi?club=930&year=07>

- ★ For member information

Pick a member name and open their edit page. The member number is shown at the bottom of the page or in their link. In this case member = 5992301 so 5992301 is the member ID for this Rotarian.

<http://www.rotary5340.org/dir/edit.cgi?member=5992301&year=07>

For other Districts

- ★ Use member semi annual billing report for member number
- ★ The club Secretary or President can access member information at Rotary.org under member access



Project Financing

- ☀ Financing must equal budget
- ☀ Calculate in US\$
- ☀ Indicate cash or DDF
- ☀ District 5340 Rotary Foundation Chair must authorize use of DDF
- ☀ Special calculator tools available from Rotary International and District DGSC

PROJECT FINANCING

Explanation: Clearly list all financing in U.S. dollars noting which funds will be contributed in cash and which will be contributed from District Designated Funds (DDF). Use of DDF must be authorized by the district Rotary Foundation committee chair. TRF matches US\$0.50 for every \$1 cash contribution and \$1 for every \$1 contribution from DDF. The primary host club or district must provide at least \$100.

NOTE: No funds should be sent to TRF prior to official Trustee approval. Upon approval, a letter will be sent to the sponsors notifying them of approval and providing detailed instructions on how and where to submit their contributions.

Host Rotary clubs or districts inside the project country (The primary host club or district must provide at least US\$100.)	Cash (US\$)	DDF (US\$)	DRFC Chair (Print Name)	DRFC Chair Authorization
International Rotary clubs or districts outside the project country	Cash (US\$)	DDF (US\$)	DRFC Chair (Print Name)	DRFC Chair Authorization
Subtotals, Cash and DDF				
TOTAL Cosponsor contributions				
Total funds requested from TRF (must be at least US\$5,000)				
Additional outside funding (not matched by, or forwarded to, TRF)				
Total project financing (must equal budget on page 4)				



Project Planning

- ☀ All questions must be answered
- ☀ Equipment cannot be owned by Rotarians or Rotary clubs
- ☀ Customs clearance must be arranged

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PROJECT PLANNING

Explanation: Before an application is submitted to TRF, project partners should discuss various planning details. The questions below are a guide to aid project planning. Note that a Rotary club/district or Rotarian may not own anything purchased with grant funds.

Identify who will own equipment and maintain, operate, and secure items purchased with grant funds. (A Rotary club or Rotarian cannot own equipment.)

Will training in use and maintenance of technical equipment be provided? If so, who will provide training?

Is software necessary to operate any items? If so, has software been provided?

Indicate what arrangements have been made for customs clearance if items will be purchased and shipped from outside the project country.

Provision of plumbing and electrification to structures where people live or work cannot be purchased with grant funds and must be funded with other sources. Have the sponsor clubs/districts planned and agreed to fund plumbing or electrification for equipment and appliances in existing buildings (hospitals, schools, libraries, orphanages, etc.)?

COMPETITIVE GRANTS

Explanation: Competitive grants are grants requesting US\$25,000 or above from TRF. They are reviewed twice a year at the October and April Trustees' meetings.

If your grant request is for US\$25,000 or above, a community needs assessment must be included. This assessment should demonstrate how the proposed project:

- Involves the benefiting community
- Is viable and will be maintained by the benefiting community after grant funds have been expended.

Please refer to the Guide to Applying Grants (3-44-03) and the GR Web site (www.rotary.org) for additional information.



Competitive Grants

☀ Grant requests of TRF
Match of US \$25,001-
\$150,000

- Competitive Process
- Community Needs Assessment Required
- Special deadlines apply

6

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Please refer to The Guide to Matching Grants (144-EN) and the RI Web site (www.rotary.org) for additional information.



Authorizations

- ☀ Authorizations signed by current year officers
- ☀ Club-sponsored vs. district-sponsored
- ☀ All signatures must be submitted with the application (otherwise application will be returned)

AUTHORIZATIONS

Explanation: Authorizations ensure that both partners are aware of, and interested in, pursuing the described project. By signing below, the current club presidents for club-sponsored projects and current district grants subcommittee chairs for district-sponsored projects, as well as the committee members, agree to the criteria listed and affirm their support of the project.

All Rotary clubs, district, and Rotarians involved in this project are responsible to The Rotary Foundation (TRF) for the conduct of the project and its subsequent reporting. The signatures of all involved parties confirm that they understand and accept responsibility for the project. Parties may either sign this page or submit a separate letter of commitment.

By signing below, we agree to the following:

- All information contained in this application is, to the best of our knowledge, true and accurate, and we intend to implement the project as presented in this application.
- The club/district agrees to undertake this project as an activity of the club/district.
- We ensure all cash contributions (as detailed in Project Financing) will be forwarded to TRF or directly to the project account after Trustee approval of the grant.
- RI and TRF may use information contained in this application to promote the project by various means such as The Rotarian, the RI International convention, RIM, The Rotarian VideoMagazine, etc.
- The partners agree to share information on best practices when asked, and TRF may provide partners' contact information to other Rotarians who may wish advice on implementing similar projects.
- To the best of my knowledge and belief, except as disclosed herewith, neither I nor any person with whom I have or had a personal or business relationship is engaged, or intends to engage, in benefiting from TRF grant funds or has any interest that may represent a potential competing or conflicting interest. A conflict of interest is defined as a situation in which a Rotarian, in relationship to an outside organization, is in a position to influence the spending of TRF grant funds, or influence decisions in ways that could lead directly or indirectly to financial gain for the Rotarian, a business colleague, or his or her family, or give improper advantage to others to the detriment of TRF. (NOTE: Any and all exceptions must be explained in an attached statement.)

Host Partner		International Partner	
<input type="checkbox"/> Club president (club-sponsored)	<input type="checkbox"/> Club president (club-sponsored)		
<input type="checkbox"/> District grants subcommittee chair (district-sponsored)	<input type="checkbox"/> District grants subcommittee chair (district-sponsored)		
Name	Name		
Title	Title		
Rotary Club	Rotary Club		
District #	District #		
Signature	Signature		
Date	Date		
Primary Contact		Primary Contact	
Name	Name		
Signature	Signature		
Date	Date		
Project Contact #2		Project Contact #2	
Name	Name		
Signature	Signature		
Date	Date		
Project Contact #3		Project Contact #3	
Name	Name		
Signature	Signature		
Date	Date		



Cooperating Organizations

- ☀ Please note: This section does not need to be completed for a beneficiary organization. **Review definition if uncertain!**
- ☀ Letter of participation from Cooperating Org
- ☀ Letter of endorsement from host partner

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COOPERATING ORGANIZATION

Explanation: A cooperating organization is an organization that is directly involved in the implementation of the project, offering technical expertise and project coordination. A benefiting entity is the recipient of goods or services and is not considered a cooperating organization.

If this project involves a cooperating organization (neither a Rotary club nor the beneficiary of the project), provide the following:

Name of organization _____
Street address _____
City, State/Province _____ Postal code _____ Country _____
Office phone _____ Fax _____
E-mail _____ Web address _____

In addition to the above, the following must be attached:

- Letter of participation from cooperating organization that specifically states:
 - Its responsibilities and how it will interact with Rotarians
 - The organization's agreement to cooperate in any financial review of the project
- A letter of endorsement from the host partner confirming that the cooperating organization works within that country's laws

FINAL REPORT

Explanation: Although both partners are responsible for completing progress and final reports, the Trustees require that one partner take primary responsibility for submitting the final report. It is recommended in if the club or district receiving the funds should take primary responsibility.

"By signing below, our club/district accepts primary reporting responsibility."


Print name _____ Signature _____
Rotary club _____ District _____

INTERMEDIATE COMMUNICATIONS

Explanation: The Trustees require that the district grants subcommittee chair (DGSC) from either the host or international sponsor district confirm 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 DGSC _____ Signature _____
District _____ Club _____



Final Report Section

- ☀ **Both** sponsors are responsible for reports, but you should designate one club to file reports
- ☀ Club / district handling grant funds often takes the lead in reporting **because they have the documentation**
- ☀ Reports will include:
 - ☀ Bank Statements and receipts
 - ☀ input from both sponsors
- ☀ Reporting requires regular communication which is why **contact information** is important

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If this project involves a cooperating organization (not a Rotary club nor the beneficiary of the project), provide the following:

Name of organization _____
Street address _____
City, State/Province _____ Postal code _____ Country _____
Cable phone _____ Fax _____
E-mail _____ Web address _____

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"By signing below, our club/district accepts primary reporting responsibility."


Print name _____ Signature _____
Rotary club _____ District _____

DISTRICT GRANT COMMITTEE CHAIR

Explanation: The Trustees require that the district grant subcommittee chair (DGSC) from either the host or international sponsor district confirm 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 DGSC _____ Signature _____
District _____ Date _____



DGSC Review

- ☀️ DGSC (District grants subcommittee chair) must confirm that the application is complete
- ☀️ By either Host or International Partner
- ☀️ Does not guarantee Trustee approval

COOPERATING ORGANIZATION

Explanation: A cooperating organization is an organization that is directly involved in the implementation of the project, offering technical expertise and project coordination. A benefiting entity is the recipient of goods or services and is not considered a cooperating organization.

If this project involves a cooperating organization (rather than a Rotary club) as the beneficiary of the project, provide the following:

Name of organization _____
Street address _____
City, State/Province _____ Postal code _____ Country _____
Cable phone _____ Fax _____
E-mail _____ Web address _____

In addition to the above, the following must be attached:

- Letter of participation from cooperating organization that specifically states:
 - Its responsibilities and how it will interact with Rotarians
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- A letter of endorsement from the host partner confirming that the cooperating organization works within that country's laws

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"By signing below, our club/district accepts primary reporting responsibility."

Print name _____ Signature _____
Rotary club _____ District _____

DISTRICT GRANTS SUBCOMMITTEE CHAIR REVIEW

Explanation: The Trustees require that the district grants subcommittee chair (DGSC) from either the host or international sponsor district 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 DGSC _____ Signature _____
District _____ Date _____



Completion Checklist

☀ Helpful to ensure that the application is accurate and complete

COMPLETION CHECKLIST

Before submitting your Matching Grant application, please take a moment to review this checklist. If you have any questions or concerns, please contact the Humanitarian Grant Coordinator for the project location.

- Does the project meet all grant policies and guidelines (see The Guide to Matching Grants [144-EN] or the RI Web site at www.rotary.org)?
- Does the project description clearly state how the project will assist those in need?
- Are the activities of the host and international partners clearly explained? Will the Rotarians be actively involved in the project?
- Have both the host and international partners 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 DDF?
- Has the DFPC chair provided his/her signature authorizing the use of District Designated Funds?
- Have the club presidents or district grants subcommittee chairs from the host and international partner provided their authorizing signatures?
- Have all site 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, is the Revolving Loan Fund Supplement and Credit Group Plan included?
- If the grant request is US\$25,001 or more, is a community needs assessment attached?
- Has the district grants subcommittee chair from either the host or international partner certified the application as complete and eligible?
- Is there a minimum of nine authorizing signatures included in the application?
- Have the partners made copies of all documents for their files prior to submitting them to TRF?

Complete applications should be sent to:



Humanitarian Grants Program
The Rotary Foundation
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Fax: 847-866-9759
E-mail: grants@rotary.org



Helpful Hints

Verify that there are no issues to prevent approval before submission:

- ☀ Confirm all sections of the application are completed
- ☀ Signatures are all gathered
- ☀ No current issues for either club – see tip!



TIP

Call TRF to check outstanding report status for district (**no less than 70% reporting**) and both clubs (**dues current, no more than 5 host projects open, no past due MG reports**)

See list of contacts by country, or call anyone in the Foundation to check.



Reserve District DDF

- ✦ Complete District 5340 Club Disclosure Form to reserve DDF (District Designated Funds)
- ✦ Send completed form to District Foundation Chair Sandi Rimer in care of the District Office



District review of draft

- ★ Notify DGSC when your draft is posted on matchinggrants.org via email: matchinggrants@rotary5340.org
- ★ Upon District Approval, collect club signatures and fax them to DGSC @ **District Fax number 619-299-3826**
- ★ DGSC will assemble grant, obtain required Foundation and District signatures and submit to TRF





About signatures...

Signatures do not all need to be on the same document. Individual sheets can be faxed in for assembly.





District Review Complete

Application submitted to
The Rotary Foundation

Are we done yet?



TRF ~ Matching Grants Lifecycle begins...

Application Phase

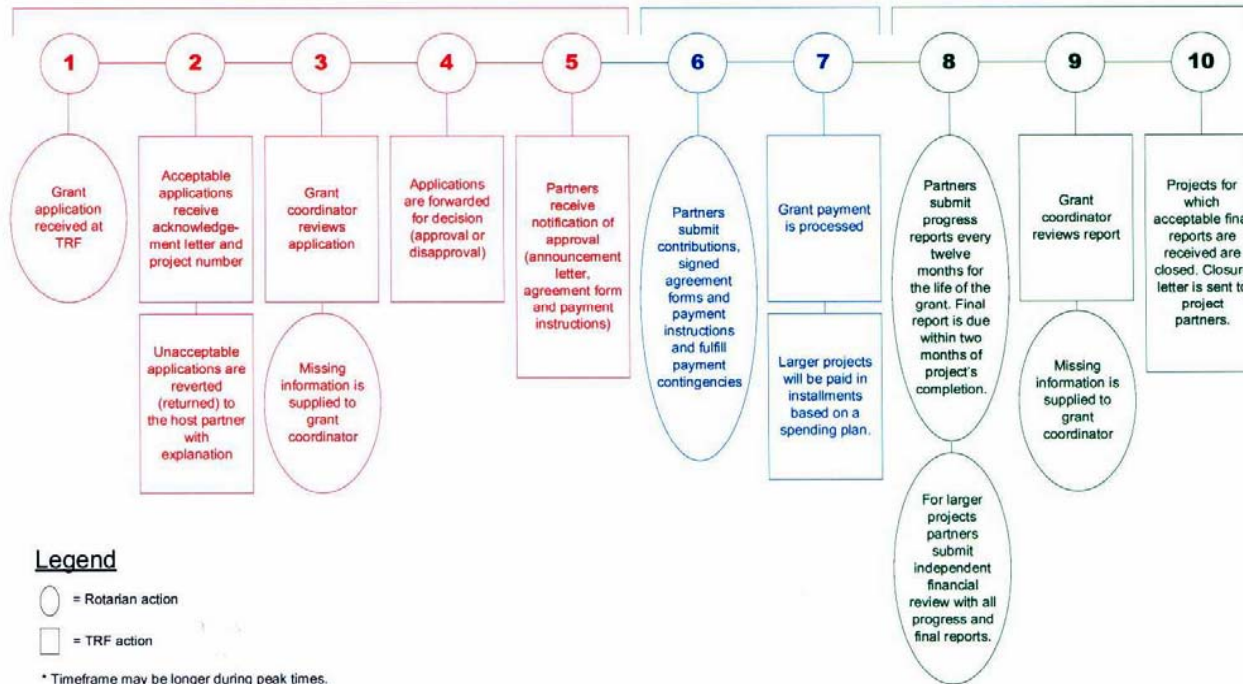
If application arrives at TRF complete, time from receipt to approval of application is approximately 4 weeks.*

Payment Phase

From time that TRF receives all paperwork and contributions, processing of payment takes approximately 4-6 weeks.*

Reporting Phase

Grant coordinators review reports within 1-2 weeks of receipt at TRF.*



GRANT LIFE CYCLE~

Application Phase

- ✦ Application received by TRF (acceptable grants acknowledged & sent grant number /unacceptable returned)
- ✦ Post TRF Grant number to the MG website and use for all future communications
- ✦ Application reviewed before forwarding (missing information requested)
- ✦ Grant approved, award letter sent to clubs with agreement & request payment instructions



TIPS

- ✦ Share grant number and password to those in your club who need access
- ✦ Receiving a project number does not indicate the grant has been approved
- ✦ Do not initiate purchases until funds received



Announcement Email Letter plus attachments!



THE ROTARY FOUNDATION
of Rotary International
1560 Sherman Avenue
Evanston, IL 60201-3698 USA

16 November 2005

Host Partner:
Sam Appiah, Primary Contact
Rotary Club of Accra Downtown, D9000
P. O. Box 23104
Accra
GHANA
Email: sapplah@email.com
Fax: 233 21 555 555

International Partner:
Mary Smith, Primary Contact
Rotary Club of Evanston Downtown, D6010
3521 Central Street
Evanston, IL 60201
USA
Email: msmith@email.com
Fax: 847 565 5555

Ref: Matching Grant # 68101

Dear Rotarians Wilson and Smith:

Congratulations! Your Matching Grant application, submitted by the Rotary Club of Accra Downtown, D9000 and the Rotary Club of Evanston Downtown, D6010 for funding to provide equipment and materials for drying mangoes to the Good Life Women's Co-op in Accra, Ghana, has been approved by The Rotary Foundation (TRF). The award is in the amount of US\$5,000.

This letter serves as formal notification of approval and will help to identify what is needed to receive payment. For all grants, the primary partners must both sign the Agreement Form and ensure correct Payee Information is sent to TRF. Any additional information and/or sponsor contributions TRF requires in order to make grant payment are described in this letter and the Agreement Form.

- 1. Agreement Form.** This document details the agreement between the primary clubs/districts involved in the grant and the Foundation. Be certain to refer to this document throughout the implementation of the project to ensure compliance with TRF requirements. The Agreement Form should be signed and sent directly to The Rotary Foundation to the attention of the Grant Coordinator via e-mail, fax or mail.
- 2. Payee Information Form.** This document must be completed and returned to TRF stating where and how funds should be sent to the project. Please coordinate with your partner to establish an appropriate payee.
- 3. Contributions.**
 - a. Contribution form.** This form is attached and should be used for all cash contributions sent to The Rotary Foundation for your project. The Matching Grant number must be stated on the form to ensure that your contributions are correctly received. **SHOULD** you choose to send cash contributions directly to the project, or the contribution is in the form of DDF/Share funds, this form will not be needed.
 - b. Funds Sent Directly.** If cash contributions are being sent directly to the project account you must send confirmation that the contribution has been received for the project (a copy of the deposit slip, bank statement, paid invoice, etc.) **NOTE:** Paul Harris Fellow Recognition credit will not be awarded for contributions sent directly.

- 4. Payment Contingency.** Payment of this grant is contingent upon receipt of confirmation that the co-op building has been constructed and is ready to receive the equipment.
- 5. Closure contingency.** Closure of this grant is contingent upon submission of copies of receipts for all equipment purchased.

Note: There is a limit of 6 months from the date of this letter to submit all the information needed for payment. Should the required forms and contributions not be received within 6 months, the grant may be cancelled. It is extremely important to remain in constant contact with your partner to ensure the above requirements are completed.

Both partners are sent a copy of this letter and included forms. It is not necessary to have all authorizing signatures on the same document as they can be sent in separately. Keep a copy of the signed forms for your records before returning them to TRF. Faxes are acceptable, and originals are not required.

Additional information you will find helpful is included. (If you are receiving this document via e-mail, please see the accompanying e-mail message for links to the documents on the RI website.)

- 1. Terms and Conditions of Matching Grant Award** is a document that details the guidelines for implementing your project. Read this document carefully, and refer to it when you have questions about TRF requirements.
- 2. Report Form.** Reporting on your project is mandatory. Progress reports are due at least every three months, and a Final Report must be submitted within two months of your project's completion.
- 3. Humanitarian Programs Promotional Guide** contains information about how to promote your project in the community and in the media.

If you have any questions, please contact me.

Sincerely,

William Smith
Grant Coordinator
Humanitarian Grants Program
The Rotary Foundation
Phone: (847) 866 3000
Email: william.smith@rotary.org
Fax: (847) 866 9759

cc: Mohamed Sourmah, Governor, Rotary District 5000
Elizabeth Peterson, Governor, Rotary District 6010
Andrew Wilson, District Rotary Foundation Committee Chair, District 9000
John Dawson, District Rotary Foundation Committee Chair, District 6010
Jacqueline Coulibaly, District Grants Subcommittee Chair, District 9000
Peter Webbo, District Grants Subcommittee Chair, District 6010

Enclosures: Matching Grant Agreement Form, Payee Information Form, Contribution Form, Terms and Conditions of Matching Grant Award, Report Form, Humanitarian Programs Promotional Guide

MG058101 Staff Initials WS



Agreement Form

Signatures of current presidents of Host and International clubs ensures TRF that the current officers are aware of and involved in the project.

See note about signatures...

THE ROTARY FOUNDATION
of Rotary International
1600 N. Lincoln Avenue
Evanston, IL 60201-3600 USA

MATCHING GRANT AGREEMENT FORM
MATCHING GRANT #19101

The Matching Grant Agreement (Agreement) is entered into by and between Rotary Club of Austin, Texas (The Partner) and The Rotary Foundation of Rotary International (TRF). TRF agrees to provide The Partner a Matching Grant in the total amount of \$100,000.00 to provide equipment and materials for a project to be carried out by The Partner in Austin, Texas. In consideration of the Matching Grant from TRF, the Partner agrees to the following:

- 1) The Partner has read, understood and read a copy of the Terms and Conditions of Matching Grant and will abide by all terms and conditions therein.
- 2) Rotary Club of Austin, Texas will contribute the project (hereinafter referred to as the project) to TRF and will contribute \$50,000.00 to the project. The Partner will contribute the project to TRF and will contribute \$50,000.00 to the project. The Partner will provide TRF with a copy of the project budget, including a list of all equipment and materials to be purchased for the project. The Partner will provide TRF with a copy of the project budget, including a list of all equipment and materials to be purchased for the project. The Partner will provide TRF with a copy of the project budget, including a list of all equipment and materials to be purchased for the project.
- 3) All Matching Grant funds provided by TRF for the project shall not be used for any purpose other than those approved by TRF. TRF shall not be held liable for any damages, losses, or expenses incurred by the Partner or any other person or entity in connection with the project or any other person or entity in connection with the project. The Partner shall be responsible for all damages, losses, or expenses incurred by the Partner or any other person or entity in connection with the project or any other person or entity in connection with the project.
- 4) The Partner will keep TRF informed on the project's progress by submitting progress reports every three months during the implementation of the project. The Partner will immediately advise TRF of any significant problems with the implementation of the project or deviations from the project, including deviations in the budget. The Partner will submit the final report to TRF in a timely manner and according to the terms of the project's completion.
- 5) The Partner shall defend, indemnify, and hold harmless TRF, TRF's respective directors, officers, and employees (collectively "TRF") from any and all damages, losses, judgments, costs, fees, awards, liabilities, or expenses, including attorney's fees, incurred or suffered by TRF or any of its directors, officers, or employees in connection with the project, including any tort or contract claims of the Partner.
- 6) The entire responsibility of TRF is hereby limited to payment of \$100,000.00 plus all applicable taxes and expenses. Nothing shall limit TRF's entire responsibility in connection with the project.

TRF reserves the right to terminate this Agreement and without reimbursement of either or both of the Parties to date by terms set forth in the Agreement and the Terms and Conditions of Matching Grant should upon expiration, TRF shall be entitled to a refund of any Matching Grant funds, including any interest earned, that have not been expended pursuant to the terms and conditions of the approved Matching Grant project at the time of termination.

This Agreement will automatically terminate in the event of the failure of either or both of the Parties to comply with the Matching Grant Terms and Conditions in the Agreement, such as an act of God, strike, war, fire, insurrection, hurricane, earthquake or other natural disaster, acts of public enemies, or any other event beyond the reasonable control of the parties. In such an event, the Parties shall refer to TRF as to appropriate Matching Grant funds within 30 days of termination.

This Agreement is governed by the laws of the State of Texas, USA. Any action brought to enforce this Agreement shall be held in the County of Cook, State of Illinois, USA. The Parties agree to submit all disputes to the Circuit Court of Cook County for the State of Illinois.

TRF agrees to this grant in consideration of the contribution that this group, including its team, commitment and ability to receive the equipment. Closure of this grant is a contingent upon completion of a copy of the project for all equipment purchased.

By signing this form, I certify that I am the current president of the club and I am aware of and understand the terms and conditions of the Agreement and the Matching Grant Award and Acceptance.

Date: _____ day of _____, 20__

Partner: _____
Rotary Club of Austin, Texas

Rotary: _____
Rotary Club of Austin, Texas

Start Date: _____

The partners do not have to sign the same copy of the Agreement Form. Both partners receive the same form and can send in their signed copies separately.



TIP

- ☀ Check with your partner Rotary club to make sure they are sending their copy of the signed Agreement Form to TRF



Payee Information Form

Instructions for wiring payment

- Limit the length of your account name to 35 characters, including spaces.
- Sections A and C completed for all grants.
- Section B must be completed only if payment is to be made in U.S. dollars by wire transfer outside of the United States.

PAYEE INFORMATION FORM FOR MATCHING GRANT #69101

Return this completed form along with the signed agreement to TRF for the release of funds. Please note the following:

- This form must be filled out completely or payment will be significantly delayed.
- The project bank account must be a Rotary club- or district-controlled account.
- Payments will not be made payable to an individual, co-sponsoring organization, or beneficiary.
- Please provide the exact name on the account, which must be 35 characters or less.
- The form of payment will be based upon the geographic area. We recommend that all information necessary to facilitate sending funds via electronic funds transfer be provided.
- Please note that if payment is made via check, it will be sent directly to the project's Primary Contact.
- Payments that are misdirected due to incomplete or incorrect payee information will be the club or district's responsibility.

SECTION A: Project Bank Account

Bank Account Name:	
Complete Bank Account Number:	
<small>(Account number must include Bank code, Branch code, Account Number, Key code, & Stat code, if applicable)</small>	
Account Currency (USD or local currency - specify):	
Receiving Bank Name:	
Receiving Bank Address/City/State or Provincial/Postal Code/Country:	
Receiving Bank Telephone Number/Fax Number:	
<small>ABA Routing # (The ABA number is the routing code for U.S. based banks and is required for all electronic funds transfers within the U.S.)</small>	
<small>SWIFT BIC Code (The SWIFT bank identification code (BIC) is the bank code required for all international transfers.)</small>	
<small>IBAN (The International Bank Account Number (IBAN) is required for all European Payments.)</small>	
Other required bank codes (specify code):	

SECTION B: Intermediary/Correspondent Bank Information - For International USD electronic funds transfers, you must include your bank's U.S. Intermediary/Correspondent bank information. Please contact your bank to obtain this information and enter below.

U.S. Intermediary/Correspondent Bank Name:	
U.S. Intermediary/Correspondent Bank Address/City/State:	
U.S. Intermediary/Correspondent Bank Phone/Fax:	
U.S. Intermediary/Correspondent Bank ABA Routing #:	

SECTION C: Project Account Signatories
Provide the names of two Rotarians who will be the signatories on the project account and responsible for receipt and disbursement of grant funds (they should be members of the primary club or district).

	Primary Signatory	Secondary Signatory
Name:		
Rotary ID:		
Title:		
Complete Address:		
Work Tel:		
Home Tel:		
Fax:		
Email:		

If you have questions about this form, please contact your program coordinator, William Smith, at Tel: (847) 895 3050, Fax: (847) 895 6750, OR E-mail: william.smith@rotary.org Staff Initials: WS



Type of Account to Open?

- ✦ Depends upon # of transactions anticipated and options available from bank
- ✦ Must be separate account for each grant
- ✦ Limit the length of your account name to 35 characters, including spaces
- ✦ Grant # or project Country in Title
- ✦ Must have 2 signers

If circumstances do not permit account to be opened,
check with TRF for assistance



Which Club should open account?

Considerations:

- ☀ Convenience ~ Where are items being purchased?
- ☀ Costs associated with account & funds transfers
- ☀ Project Country issues ~ note that some countries like India have special requirements

Note: Expenses for phone calls, faxes, and bank fees can not be charged to the grant



Opening Deposit

- ★ Funds used as opening deposit for account can be part of funding for the project.
 - No Paul Harris Credit is given for these funds, but match is applied
 - Copy of receipt is submitted with grant payment instructions
- ★ If speed of processing is more important than Paul Harris Credit, send money to account.



TIP

- ✦ Wiring funds to pay invoices may be cumbersome, but may assure you of receipts and bank statements.
- ✦ International club paying invoices shows active involvement in the project



SO, where does the project funding come from?

☀ Restricted Giving By Individual Clubs

- Host Club minimum of \$100 donation
 - Submit funds to TRF using same method as submitting dues
 - Or, deposit directly to the account

• International Clubs

- Donations by Club & Members
- Non-Rotarian individuals
- Grantmakers
- Club Fundraisers

☀ Matches



Appropriate Fundraising

TRF Expectations:

- ✦ Service Above Self
- ✦ Beneficiaries should not contribute funds to receive assistance
- ✦ Reciprocal relationships should not be formed



Additional Funding Options:

★ Vision

- ★ Avoidable Blindness Donor Advised Fund (DAF)
- ★ Up to \$2,000 matching (+50%)

★ Caster Family Trust





Project Funding QUALIFIES For Paul Harris Fellow Recognition

- ✦ Submit individual donations using 123-en form referencing your grant number
- ✦ Attach Multiple Donor Form with one club check
- ✦ FYI ~ **No matching points** can be awarded for restricted giving to projects.



The SHARE System

Foundation Programs

PolioPlus,
3H Grants,
Matching Grants

The Rotary Foundation

FUNDING YOUR GRANT

Your Grant must be approved prior to sending in contributions so that the grant number can be specified on the donation form. Restricted donations qualify for Paul Harris Credit but do not meet Club Annual Giving Goals.

Restricted
Giving

Donations



Individual completing this form Susan C. Thorning

Daytime Telephone (958) 336-8474

Today's Date March 27, 2008

I. DONOR OF CONTRIBUTION

Mr. Mrs. Ms. Dr. Other _____

Name _____
(circle family name)

Address C/O Mission Bay Rotary Club, PO Box 90378

City San Diego St./Prov. CA

Country USA Postal Code 92169

Check here if this is a new address.

Daytime Telephone (858) 336-8474

Donor's ID # _____
(if new, leave blank)

Rotary Club of Donor Mission Bay Rotary Club

Club Number 930 District 5340

Credit the Rotary Club of Mission Bay

II. CONTRIBUTION DETAILS

Please make your check payable to The Rotary Foundation. Do not send cash.

Amount of New Contribution _____

Type: *(please check one)*

- Check enclosed Stock/Shares _____ (none)
(please contact Gift Administration for instructions)
Currency _____
 Wire transfer/bank order, date _____

Designation: *(please check one)*

- Annual Programs Fund World Fund
(eligible for SHARE) PolioPlus
 Permanent Fund Grant # _____
(Benefactor recognition only) (number is mandatory)
earnings to
 WF
 SHARE

Is this contribution being "matched" or augmented with Foundation Recognition Points? If yes, please complete the appropriate spaces below:

Foundation Recognition Points:

Club Amount _____ District Amount _____

Individual Amount _____ ID # _____

Authorized Signature _____

If there are multiple transfers of recognition, please complete a Recognition Transfer Request or attach a list of details.

III. RECIPIENT OF PAUL HARRIS FELLOW RECOGNITION

Recipient is: *(please check one)*

- Same as Donor Deceased
 Other *(give details below)*

If Other, please complete the following:

Mr. Mrs. Ms. Dr. Other _____

Name _____
(circle family name)

Address _____

City _____ St./Prov. _____

Country _____ Postal Code _____

Recipient's ID # _____
(if new, leave blank)

Rotary Club of Recipient _____
(if not a Rotarian, leave blank)

Club Number _____ District _____

IV. RECOGNITION ITEMS REQUESTED

- New Paul Harris Fellow Memorial Paul Harris Fellow
 Multiple Paul Harris Fellow: Certificate of Appreciation
(please circle one)
 Benefactor (Permanent Fund gifts only)
 1 2 3 4 5 sapphire pin
 1 2 3 ruby pin

Average processing time for recognition is four to six weeks from receipt of application.

Check here if recognition is a surprise.

Approximate presentation date _____

Please send recognition items to:

Name _____

Address _____

City _____ St./Prov. _____

Country _____ Postal Code _____

Telephone (_____) _____

Please send a copy to your Annual Giving subcommittee chair and district Rotary Foundation chair.

TIP

- ✦ Submit international club funding after host club funds are in place.

Note: If you are unable to fund within 6 months, your funding is retained by TRF as a contribution and not returned.

- ✦ Host Club should submit funding using same methods as for paying dues to Rotary International



Grant Payment

- ☀ TRF releases funds 4 to 6 weeks after all payments received
- ☀ Funds distributed by wiring to account set up for grant



Payment Phase ~ Review

- ✦ Agreement forms signed (**both clubs**)
- ✦ Payee information returned to TRF (**TRF will wire funds to this account**)
- ✦ Six months to complete funding
 - ✦ Club contributions must go to TRF to be given Paul Harris credit
- ✦ Payment wired to account as directed (**4 to 6 weeks after all funds received by TRF**)



Grant Life Cycle ~ Reporting Phase

- ☀ Implementation
- ☀ Retention of records
- ☀ Reporting as required
- ☀ Share success



Implementation

- ★ Rotarians purchase supplies and implement
(Keep all receipts for activity and statements)
 - ★ Follow grant
 - ★ Retain receipts
 - ★ Obtain prior approval from TRF for any changes
- ★ No payments in cash ~ Payment made by check helps facilitate necessary documentation



Retention of Records

- ★ Statement of income and expense
- ★ Bank statement correlated to the statement of income & expenses
- ★ Receipts cross referenced to stmt of inc/exp
- ★ Narrative statement from beneficiary
- ★ Full description of Rotarian oversight, management, and involvement in project from both clubs
- ★ Detailed description of project implementation



Helpful hints for reporting

- ★ Review original application
- ★ Review communications posted to website
- ★ Gather bank statements, receipts, invoices, and copies of checks
- ★ Either club can report, but both should provide comment
- ★ Be sure to obtain signature on report of **current club president**
- ★ Post report to web when accepted
- ★ Post TRF actions to the website



Reporting Deadlines

Clock starts from funding

- ☀ 6 months reminders from District Matching Grants
- ☀ Reports due every 12 month until project is completed
- ☀ Final report due 2 months after end of project
- ☀ File closed (keep records for 5 years)



Share Success

- ✦ Take **before and after** photos and release information to the press in both countries and TRF
- ✦ Remember, your club shares in the stewardship responsibility of demonstrating that the donations to the Rotary Foundation were used appropriately.



Benefits of Reporting

- ✦ Celebrates successes
- ✦ Communicates accomplishments to TRF
- ✦ Demonstrates good use of funds
- ✦ Provides transparency
- ✦ Meets government requirements
- ✦ Offers lessons learned



Retention of Grant Records

- ✦ Establish process in your club for retention of records for 5 years after grant completed
- ✦ Post reports to District Website
- ✦ Pass files on to new leadership



Review



Common Major MG Problems

★ Eligibility

- ★ No Construction
- ★ No Salaries

★ Reports

- ★ Delinquent Clubs: Host or International
- ★ Host has more than 5 open projects

★ Paperwork

- ★ Missing or wrong signature
- ★ Missing itemized budget

★ Communications

- ★ Host country not responding to emails



District Steps

- ✦ Identify Project and partners
- ✦ Post project to District Matching grants site www.matchinggrants.org
- ✦ Notify District Sub Committee Chair that project is ready for review
- ✦ Forwarded to District Foundation Chair for signature approval and submission to TRF



TRF – Project Steps

Application Phase

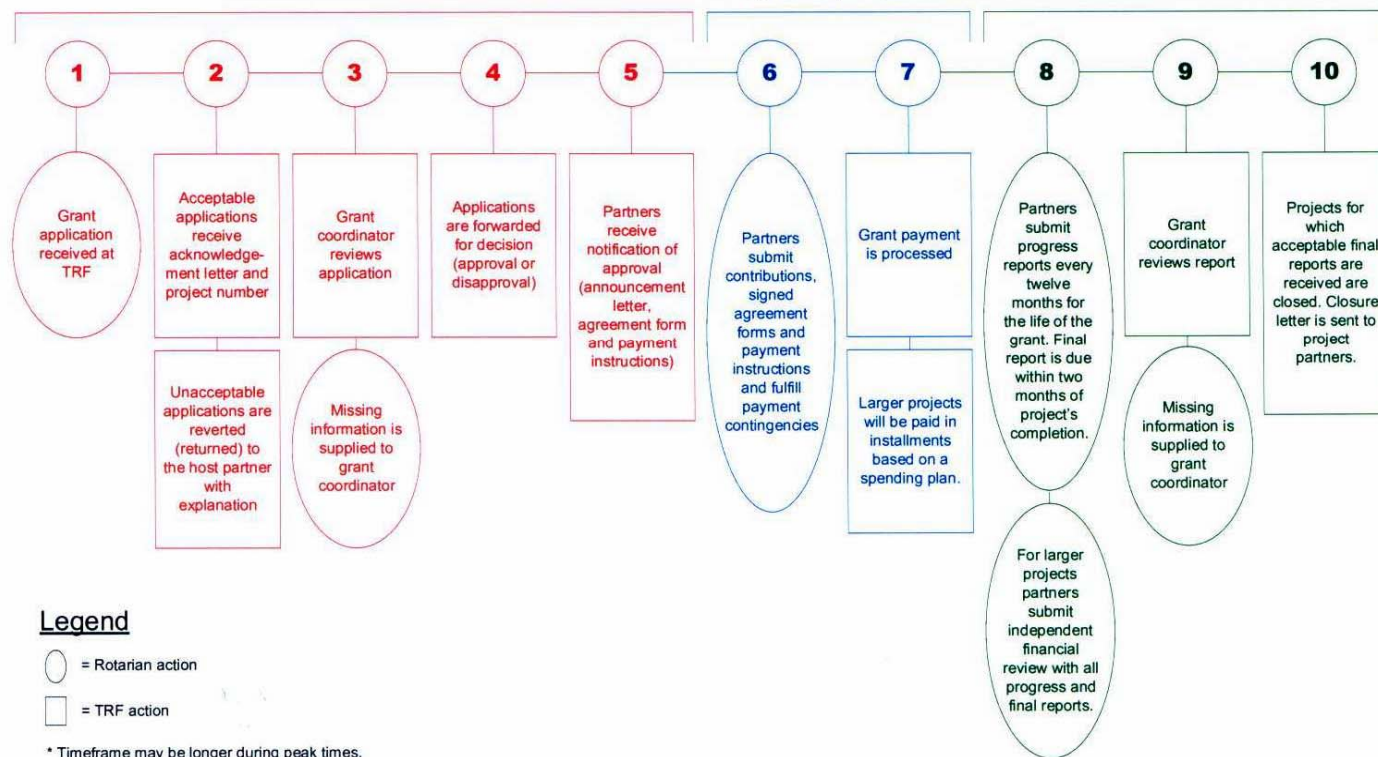
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Payment Phase

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Reporting Phase

Grant coordinators review reports within 1-2 weeks of receipt at TRF.*



Role of District Leadership

- ✦ Provide Training and Support
- ✦ Facilitate Review and Application Process
- ✦ Encourage Rotarians to fulfill responsibilities:
 - ✦ Stewardship
 - ✦ Reporting
 - ✦ Partnership obligations
 - ✦ Legal obligations to TRF and local Government



Resources

- ★ The Guide to Matching Grants [144]
- ★ Website: www.rotary.org & www.matchinggrants.org
- ★ TRF Staff ~ E-mail: grants@rotary.org
- ★ District 5340 Matching Grants Sub-Committee Chair:
Susan Thorning
858-336-6474
matchinggrants@rotary5340.org

fax: 619-299-3826
- ★ Other clubs in the district with grants experience



Use of District MG Website

- ✦ Find a project
- ✦ Seek other funders
- ✦ Track activity: *Accessible to all interested parties 24/7*
- ✦ Post Photos for Public Relations
- ✦ Manage Project progress
- ✦ Retain Project History after completion



When in Doubt?

Re-read The Guide to Matching Grants

Tip:

Using a downloaded version of the guide allows you to search and find things more easily. To search the contents, use the “find” feature on the pull down menu under edit or hit the control key and f at the same time on your keyboard!



Matching Grant Perfection

☀ Chinese proverb:

I hear, I forget

I see, I remember

I do, I understand

Go out and **Make Dreams Real!**





Questions?

Who to call?



DGSC Susan Thorning:
matchinggrants@rotary5340.org
858-336-6474
Fax: 619-299-3826