

**The following are the Grant policies and procedures that apply for allocation of District Designated Funds (DDF) for Rotary Foundation Global Grants in Rotary District 5150:**

**ALLOCATION OF DISTRICT DESIGNATED FUNDS (DDF) TO ROTARY CLUBS**

- Each Rotary Club will receive a “Fair Share” allocation from the District Designated Funds (hereinafter “DDF”) money set aside for District 5150 by The Rotary Foundation (hereinafter “TRF”). TRF will match approved Global Grant projects \$1 for \$1 of DDF allocated to those projects. It will not match any DDF funds allocated to District Grants. Rotary Clubs will receive their Fair Share allocations in July for that Rotary Year.
- Allocations will be based on each Club’s pro-rata share of the three prior years’ Annual Fund contributions, weighted 33-1/3% for each of the 3 prior years. The Fair Share available to each Club for Global Grants will only be reduced by: (1) the amount allocated to that Club for District Grants; and (2) the Club’s DDF allocated to a District Global Scholarship by the Club’s President-Elect at a District meeting preceding the Rotary Year in which the President-Elect will be Club President.
- All DDF received from endowment earnings shall be allocated in the Rotary year following receipt of the earnings for use for Global Grants. The DDF shall be allocated on the same basis as DDF allocated from club contributions to the Annual Fund with the same requirements and deadlines. Before allocation to the clubs in this manner, a portion of the DDF will be provided to new clubs to give them \$500 of DDF for their first three years of existence after the Rotary year the club was chartered. If the Club’s own DDF allocation exceeds \$500, then no DDF shall be allocated to that Club from these funds. Clubs receiving this allocation will not participate in the further allocation of this source of DDF.

**ROTARY CLUBS USE OF DDF FUNDS**

- DDF allocated to Rotary Clubs can be used for the Rotary Club to sponsor its own Global Grant project, or to support other Rotary clubs’ Global Grant projects. Clubs can donate their fair share allowance to a qualified Club’s or District’s Global Grant project, even if the donating Club is not qualified to sponsor a Global Grant project.
- Club DDF funding may be committed and reserved for a Global Grant project by providing the Grants Committee Chair with a DDF-Club Use Form or a DDF-Club Transfer Form by March 1st of the Rotary Year.
- If the Club has any overdue Rotary International Dues, District 5150 Dues, District Reports, and/or Global Grant reports, the District will not allow allocation of the Club’s DDF to any other Global Grant until the overdue Dues, District Grant Reports, and/or Global Grant Reports have been submitted and accepted.

**SPONSORSHIP OF ROTARY FOUNDATION GLOBAL GRANT PROJECTS**

- Only Clubs qualified to administer Rotary Foundation funds may apply for a TRF Global Grant. To be qualified Club officers (see next bullet point) must attend District Grants Management and Memorandum of Understanding (MOU) training, and sign TRF’s Club Memorandum of Understanding (TRF MOU) and the District’s MOU Addendum.
- To qualify, the Club President-Elect’s attendance is mandatory at one of the Grants Management and MOU training sessions sponsored by the District. Also at least one of the following must attend this training: President Nominee (preferable), International Chair, Community Service Chair or Rotary Foundation Chair. The signatures of the President-Elect and President Nominee are required on the TRF MOU and District’s MOU Addendum. In the absence of a President Nominee, then one of the above-mentioned club committee chairs who attended the Grants MOU training may sign the MOU.
- If the Club has any overdue Rotary International Dues, District 5150 Dues. District Grant Reports, and/or Global Grant Reports at the time the District is issuing the next Rotary Year’s Memorandum of Understanding, the Club will not be issued a Memorandum of Understanding for District and/or Global Grants until the overdue dues have been paid and/or District and/or Global Grant Reports have been submitted and approved.

**GLOBAL GRANT ASSISTANCE FOR ROTARY CLUBS**

- All lead Clubs should notify David Hellman, District Grants Committee Chair at the commencement of the Club’s Global Grant Project Application about the nature of the project, if the project needs additional cash and DDF support, and if the Club needs assistance from the Grants Committee in developing their Global Grant Application.
- If projects are acceptable, the Grants Chair will cause the Global Grant projects to be posted on the District Website. The posting will include if the project needs additional cash or DDF funding. That will be the source of District information for all Clubs to see if they want to assist the project.
- If requested, the Grants Chair will assign a technical resource expert to work with the Club to develop the Global Grant project and to complete the Application. The assigned person will periodically inform the Grants Committee Chair and the District International Service Committee Chair about the Global Grant application progress and any need for additional funding from other Clubs and Districts.

**DEADLINE FOR USING ROTARY CLUB DDF GRANT FUNDS**

- Uncommitted Fair Share DDF allocations to Clubs will expire on **March 1st**. By January 15th of the Rotary Year, the Grants Committee Chair will communicate with all District Clubs that they



## GLOBAL GRANT POLICIES – ROTARY YEAR 2019 - 2020

have until **March 1st** of the Rotary Year to use or commit any unused DDF allocation to a Global Grant project for that Rotary Year. The commitment can be to their own or another qualified Club's or District's current Rotary Year Global Grant project.

- The unused DDF will be recaptured for reallocation to meritorious projects. The allocation will be made by the "Grant Allocation Group" composed of the District Governor for the Rotary Year that this policy applies, District Rotary Foundation Chair, and the Grants Committee. This group shall be chaired by the District Grants Committee Chair for the Rotary Year that this policy applies. If a member of this Committee is also a member of a Club that is applying for a DDF allocation for a Global Grant, that member must abstain from participation in the vote on any allocation for the member's Club being considered by the Committee.
- All Clubs requesting unused DDF from the Grants Committee to supplement a Global Grant after March 1st shall submit a written request to the Chairman of the Grants Committee.
- DDF that is not allocated by clubs by the March 1st deadline shall be allocated to District 5150 Global Grant projects for which a District 5150 Club is the primary international sponsor. This allocation is to complete funding for projects that are ready to be submitted to TRF but need some additional DDF to complete the financing. If there are not sufficient projects to use all the funds, the Committee shall decide between other Global Grant projects in the District, Polio Plus, Peace Centers, or to hold the DDF for future use.

### PROJECTS NOT ABLE TO PROCEED

- DDF allocated by a Club to a Global Grant project that does not come to fruition shall be re-allocated to the donating Club when the Global Grant project is cancelled and removed from The Rotary Foundation list of pending Global Grants. The Club shall have six (6) months following notice of the reallocation by the District Grants Committee to allocate those DDF funds to another Global Grant project. If the Club fails to make such an allocation, then the Grant Allocation Group will reallocate the funds to complete funding of projects that are ready to be submitted to TRF but need some additional DDF to complete the financing. If there are not sufficient projects to use all the funds, the Committee shall decide between other Global Grant projects in the District, Polio Plus, Peace Centers, or to hold the DDF for future use.

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