

ROTARY DISTRICT 5150
GLOBAL GRANT POLICY
Effective For Rotary Year 2017-18

- Each Rotary Club will receive a “Fair Share” allocation from the District Designated Funds (hereinafter “DDF”) money set aside for both Global and District Grants. The Rotary Foundation (hereinafter “TRF”) will match approved Global Grants \$1 for \$1 for DDF allocated to those projects, but 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 allocated 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 made by the Club’s President Elect at the District Learning & Development Assembly in March preceding the Rotary Year in which the President Elect will be Club President.
- Only Clubs certified to administer Rotary Foundation funds (have signed a Memorandum of Understanding and have the appropriate members trained) may apply to TRF to use their DDF funds for a Global Grant. All Clubs will be able to donate their fair share allowance to a certified Club’s or District’s Global Grant project, even if the donating Club is not certified.
- All lead Clubs must notify the District Grants Sub-Committee Chair (hereinafter “Grants Committee Chair”) at the commencement of the Club’s Global Grant Project Application process 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. After review by the District Rotary Foundation Chair, the Grants Chair will cause the Global Grant projects to be posted on the District Website, and 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 Chair will assign a Committee member to work with the Club to develop the Global Grant and to complete the Application. The assigned Committee member will periodically inform the Grants Committee Chair and the District WCS Committee Chair about the Global Grant progress and any need for additional funding from other Clubs and Districts.
- By January 15th of the Rotary Year the Grants Committee Chair will communicate with all District Clubs that they have until February 28th 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 certified Club’s or District’s current Rotary Year Global Grant project. Uncommitted Fair Share DDF allocations to Clubs will expire on February 28th. 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 for the Rotary Year that this policy applies, and the Grants Committee. That group shall be chaired by the District Rotary Foundation 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.

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- 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 February 28th of the Rotary Year.
- If the Club has any overdue District 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 for the next Rotary Year until the overdue District and/or Global Grant Reports have been submitted and approved.
- If the Club has any overdue District and/or Global Grant Reports, the District will not allow allocation of the Club's DDF to any other Global Grant until the overdue District and Global Grant Reports have been submitted and accepted.
- The attendance requirements for Grants MOU Training is changed to the following for the 2018-19 Rotary year and thereafter, and this will be added to the MOU (Memorandum of Understanding) District Addendum and distributed to President Elects by the end of the second quarter of the Rotary year (December 31st): "To qualify for an MOU, there shall be mandatory attendance at one of the Grants MOU Trainings by the Club's President Elect and at least one of the following: 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 Addendum MOU. In the absence of a President Nominee, then another appropriate Club member may sign the MOU who has attended the Grants MOU training"
- Commencing with the 2017-18 Rotary year, from earnings on the The Rotary Foundation Endowed Funds that is credited to District 5150 DDF for the then current Rotary year (which historically has not been designated for the Clubs to allocate), for the first three years of a new Club's existence following its charter year, if needed the new Club shall be allocated sufficient DDF so that the Club has \$500 of DDF available for allocation to District and/or Global Grant projects. If the Club's own DDF allocation exceeds \$500, then no DDF shall be allocated to that Club from these funds.
- DDF that is not allocated by Clubs by the February 28 deadline shall be allocated to District 5150 Global Grant projects for which a District 5150 Club is the primary international sponsor to complete funding of the 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, Polio Plus, Peace Centers, or to hold the DDF for future use.
- DDF allocated by a Club to a Global Grant project that does not come to fruition shall be re-allocated to that Club when the Global Grant project is 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 the 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,

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the Committee shall decide between other Global Grant projects, Polio Plus, Peace Centers, or to hold the DDF for future use.

- All Clubs requesting unused DDF from the Grants Committee to supplement a Global Grant after February 28th shall submit an application in writing to the Committee. Any Committee member whose club is requesting use of that unused DDF after February 28th must recuse him/herself from discussion and vote on the request.

- 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. Those new clubs will not participate in the further allocation of this source of DDF.