
TRF Programs Division Key Messages

21-25 June 2010



FAQ FV Pilot District concerning HP grants

* These FAQ's can also be found on the portal page in the Reference library.

1. **Q:** Why can't pilot and nonpilot clubs/districts serve as partners on global grants and Matching Grants?
A: The decision to restrict global grant participation to pilot districts was based on a number of factors: First, grant activities between pilot and nonpilot districts are being kept separate in order to obtain controlled and accurate data with which to evaluate the success of the pilot. Second, it is important that the primary partners of global grants are using the same grant making process in which they have received training and both have completed qualification. Finally, the new online Future Vision site in Member Access was designed for access only by pilot clubs and districts in order to test the system prior to full roll out in 2013-14.
2. **Q:** How are global grant contributions matched by The Rotary Foundation?
A: The Rotary Foundation matches cash contributions from pilot clubs/districts at 50%. DDF contributions from pilot districts are matched at 100%.
3. **Q:** Can nonpilot districts make DDF contributions to Rotary Foundation Global Grants?
A: Nonpilot districts cannot make matched DDF contributions to global grants. However, nonpilot districts can donate a portion of their DDF to a pilot district. The donated funds become part of the recipient pilot district's total available DDF to be used at their discretion. The donation is not earmarked for use on a particular project, and the Foundation does not monitor any agreements districts may have for the use of the funds. As with all DDF, the donation is eligible for a match from TRF for an eligible global grant project.
4. **Q:** How do districts donate DDF?
A: The district governor and district Rotary Foundation committee (DRFC) chair must complete a simple district-to-district DDF donation form and submit it to The Rotary Foundation (TRF). The donating district's DDF is debited from their account and credited to the recipient district's DDF account. To obtain this customized form, the district governor or DRFC chair should contact Steve Lyons (Steve.Lyons@rotary.org).
5. **Q:** Can nonpilot clubs/districts make cash contributions to global grants?
A: Cash contributions from nonpilot clubs/districts will not be accepted or matched by TRF. Nonpilot clubs/districts wishing to donate cash to a global grant may send these funds directly to the project account

to provide goods and services outside of the grant budget. No TRF match or Paul Harris Fellow credit is provided.

6. Q: Can pilot clubs/districts make contributions to Matching Grants?

A: Pilot clubs/districts cannot make matched cash or DDF contributions to Matching Grants. However, pilot districts can donate a portion of their DDF to nonpilot districts for use at their discretion in the financing of a Matching Grant using the same process identified in point 4 above.

7. Q: Can districts transfer DDF to a pilot district to support Rotary Foundation District Grant projects and activities?

A: District grants are funded solely by DDF generated from a pilot district's Annual Programs Fund giving from three years prior, including Permanent Fund *SHARE* earnings. Donations of DDF from other districts will not increase a pilot district's available district grant funds.

8. Q: How can pilot and nonpilot clubs/districts partner during the Future Vision pilot?

A: In addition to making district donations of DDF, pilot and nonpilot districts may also collaborate on projects funded through district grants and District Simplified Grants. Clubs and districts can also use the ProjectLINK database to identify projects for direct cash contributions.

Additional partnering opportunities are described here:

http://www.rotary.org/RI/documents/en_pdf/fv_district_partnerships_en.pdf

HP Territory Contact Sheet

HP recently finalized a large number of changes to the territories that the Humanitarian Grants coordinators will have during the 2010-11 Rotary year. The changes are based on staff changes, the 100 districts moving to the Future Vision pilot*, and general rebalancing of file loads for staff working with Matching and District Simplified Grants. Those changes are reflected in the attachment.

The coordinators will be responsible for their new territories as of the end of the day Monday, 21 June 2010. The TRF Contact Center, RI international offices and some key Evanston staff have been notified. WEED will be updated by 25 June or shortly thereafter.

The updated contact sheet can be found on the portal and will be available on the web shortly.



Matching Grant Travel Eligibility Information Guide

*This document is currently be translated and will be available on the web and on the portal shortly

The Trustees of The Rotary Foundation (TRF) approved adding international travel as an eligible expense for Rotarian volunteers to directly implement a Matching Grant (MG) project. Travel and related expenses will be accepted as part of Matching Grant applications submitted on or after 1 July 2010. Below is a compilation of anticipated questions and corresponding answers to help explain how Rotarian's travel is accommodated by Matching Grants.

Q. Should I include travel expenses as part of my Matching Grant application?

A. You may include international travel and related expenses on your application if there is a need to have qualified/professional Rotarians travel to the project site in order to provide direct service in the implementation of the project. Prior to utilizing these funds it should be confirmed that there is no local expertise available to do the job of the Rotarian traveler. These expenses will utilize the available World Fund budget for MGs, so it is recommended that clubs and districts only use these funds when absolutely necessary.

Q. Who can travel with funds from a Matching Grant?

A. Rotarians from outside of the project country may travel using funds from a TRF Matching Grant. Rotarian travelers must be qualified in the field of the humanitarian project and must be needed to directly implement the project. You may include travel and related expenses on your application only if there is a need to have qualified, professional Rotarians, with a unique expertise unavailable in the project country for direct implementation of the project.

Q. Who cannot have their travel funded by a Matching Grant?

A. Non-Rotarians, Rotarian spouses, Rotaractors, Interactors and honorary Rotarians are not eligible for grant-funded travel. Rotarians with no expertise in the field of the project may not receive grant funds for travel to the project site. No Rotarians (qualified or not) may receive funding to attend opening ceremonies or to audit/report on the project. Please note that travel for these purposes can be funded from other sources.

Q. What expenses are eligible for funding in my Matching Grant application?

A. TRF will cover coach class airfare, travel insurance, immunizations, visas, domestic transportation, lodging, food and other ancillary expenses directly related to international travel.

Q. What additional information will I need to provide on the MG application?

A. The following list of additional requirements will be needed:

- Travel expenses will need to be included in both the budget and the financing portions of the application.
- An updated MG application will be available soon and includes an area on the planning page of the form confirming that you have included all travel fees and related expenses such as travel insurance, plane fares, immunizations, visas, lodging and food.
- Background information for each Rotarian traveler, detailing their qualifications and their direct role in the project's implementation, should be included either in the application or attached separately to the application.
- The authorization section of the application now includes confirmation that both partners understand that TRF's financial responsibility is limited to the dollar amounts approved on the application's budget. Additional costs due to changes in airfares, lodging, etc are the responsibility of the sponsors or outside sources.
- A check box will need to be selected on the authorization page under the president of the host club (or DGSC if the grant is District sponsored) confirming that the host club/district has extended a travel invitation, fully supports and approves Rotarian travelers and verifies that international travel to the club/district is imperative to the implementation of the project.

Q. Can Rotarians utilize the Rotary International Travel Service (RITS) for arranging travel?

A. No. RITS cannot be used to arrange travel. Other travel agencies, airlines and internet sites will need to be the source for arranging travel.

Q. Can Rotarians travel to any project country?

A. No. Rotarians can only travel to project countries that are not on the Rotary International travel ban list. The Rotary Foundation will abide by Rotary International's travel ban list and not approve travel to any countries where travel may not be safe.

- Q.** What will happen if I used the old application form and include travel costs?
A. TRF will still process your application and any additional information needed will be requested by the Grant Coordinator handling your application.
- Q.** Can I update a previously approved Matching Grant to include travel?
A. No. Once a grant application is approved the budget and financing cannot be changed. Please note that any grants approved prior to 1 July 2010 cannot be amended to include travel.
- Q.** Is there a limit to the number of Rotarian travelers, number of times an individual Rotarian can travel or the amount of funds that can be spent towards travel?
A. No. The Trustees placed no limit on the number of travelers, the frequency of travel for a single individual or the amount of money that can be spent towards travel.
- Q.** Can Rotarians driving to another country have funds covered by a Matching Grant?
A. Yes. Whether flying or driving international travel costs will be permitted. The costs would then cover gas, mileage and hotel stays in route to the project. Please note that these will only cover costs for Rotarians. If non-Rotarians are traveling their costs will have to be funded outside of the grant.
- Q.** Can travel be for project planning as was allowed in previous travel grants?
A. No. Travel is only for implementing the current humanitarian grant and cannot be used to plan a future project.

HINTS

1. *Be sure to have additional outside funds available to compensate for fluctuations in airfare and lodging. If travel rates change, the MG budget cannot be increased once it is approved by the Trustees.*
 2. *Do not purchase airfare prior to grant approval as MGs cannot begin until approval of the grant is formally given by the Trustees.*
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