

Matching Grants – All DDF - Funding Examples
 (Prepared by Sally Montagne, D5500 Grants Chair, August 2011)

1. Under the new “All DDF” Matching Grant formula, District 5500 can match up to 150% of the D5500 club funds with DDF on projects \$20,000 or under. (DDF is the 50% of our Annual Fund giving 3 years prior.) If the needed funds from us for the project are over \$20,000 we will only be able to match the club funds up to a total of \$10,000 so that there will be funds left for other projects.
 This is an improvement for the clubs as the old formula only let us match 100% of the club funds. It also provides that the club’s share will go to the Annual Fund (which will increase our DDF three years later so we can do more projects and District Simplified Grants), rather than to “Other Restricted” which does not count towards Annual Giving. Paul Harris credit will be given for both club and individual member contributions towards a matching grant.
2. The “club contribution” is the total of all the contributions from clubs in D5500. Generally at least 2-3-4 clubs contribute funds to each of our matching grant projects, although only 1 club is also OK. We do not match the contributions of clubs in other districts.
3. The way we calculate this is to take the total cost of the project:
 - subtract the contributions and match of the “Host Partner” and their District’s DDF (if any)
 - subtract the contributions from any other clubs in other districts or other districts (if any)
 - the remaining amount is the amount we use to figure the amount needed from our club or clubs.
4. In figuring the credit from the Host Club and Host District, be aware that The Rotary Foundation (TRF) matches CLUB funds only 50%, while it matches District DDF 100%. Take the net balance due by us and divide by 3, and that will be the club’s contribution under our new formula.
5. The total cost of a matching grant project must be at least \$10,000. That is because we must request at least a \$5,000 “match” from TRF.

	Club Funds	DDF	TRF Match	Total
6. Example of Matching Funds - Project Totals \$15,500				
Club Funds from Host Club (Project Country)	\$1,000		\$ 500	\$1,500
DDF from District in Project Country		\$1,000	\$1,000	\$2,000
Thus \$12,000 must be raised from our Clubs and District (\$15,500-\$3,500=\$12,000)				
Club Funds (D5500 clubs)-1/3 of \$12,000	\$4,000			
(This money is not matched by TRF under this new “All DDF” method)				
District 5500’s DDF Match (150% of club funds)		\$6,000	\$6,000	<u>\$12,000</u>
Total contributions from clubs, Districts, and TRF.....				\$15,500.

6. The grant is then submitted to the District for review and approval, including determination about whether the full %150 DDF match is possible for this project. Once approved, the club(s) will then send their contribution for the grant to the District in the form of a check addressed to “The Rotary Foundation”. The District will record this check and when the grant is approved, the check will be sent to the Rotary Foundation as an Annual Fund contribution.
7. Contributions to grants will continue to be in additional the club’s normal EREY (Annual Fund) contributions. Grant funds never counted as “Annual Giving” before. This new procedure however will increase the total Annual Giving by the District and result in more DDF in 3 years for use on District 5500 District Simplified Grants, Matching Grants, GSE Teams, Ambassadorial Scholars, and any other DDF eligible expenses.
8. Questions: Please contact Sally Montagne, 520-250-4601 (cell) or sally.montagne@comcast.net.

What projects are eligible for a Matching Grant?

Matching Grants fund humanitarian projects that benefit a community in need. Many projects fall within this broad scope; however, certain items and activities are not funded through the program. The chart below gives a general eligibility outline. If you are unsure of the eligibility of your project, please contact the Humanitarian Grant Coordinator for the project location.

ELIGIBLE	INELIGIBLE
Revolving loans/microcredit	Establishment of a foundation, permanent trust, or long-term interest-bearing account
Short-term rent or lease of buildings	Purchase of land or buildings, rent for housing
Construction of infrastructure such as service roads, wells, reservoirs, dams, bridges, latrines, toilet blocks, water supplies, and other similar structures	Construction or renovation of any structure in which individuals live, work, or engage in any gainful activity. This includes buildings, containers, mobile homes, or structures where individuals carry out any type of activity such as manufacturing, processing, maintenance, or storage, including provision of new services or upgrade of facilities
Purchase of equipment or appliances	Provision of plumbing or electrification inside buildings
Short-term and/or contracted labor for project implementation	Salaries for individuals working for another organization
Administrative expenses for project activities	Operating or administrative expenses of another organization
Primary and secondary education, tuition, transportation	Postsecondary education activities, research, or personal or professional development
Domestic travel for beneficiaries and professional staff needed to implement the project	Domestic travel expenses for opening ceremonies or to report on a project
International travel for qualified Rotarians to implement a project. Eligible costs include airfare, travel insurance, immunizations, visas, lodging, food, and other ancillary expenses.	International travel for non-Rotarians or Rotarians that do not have a professional qualification needed to implement the project. Additionally, grant funds cannot be used for Rotarian travel to initiate, promote, or evaluate projects.
Detailed, itemized expenses	Contingencies, miscellaneous expenses
Assistance to land mine victims	Land mine removal
Publicity expenses such as newspaper fees, or printing of posters, brochures, or fliers to inform the community of an available service	Rotary signage
Vaccines and immunizations, if the project is consistent with the criteria, procedures, and policies of the PolioPlus program and World Health Organization	Transportation of vaccines or immunizations by hand over national borders
New Rotary-sponsored projects not already in progress or completed	Projects already undertaken and in progress, existing projects, activities primarily sponsored by a non-Rotary organization, or projects already completed
Maternal and prenatal health and education	Purchase and distribution of birth control devices and ultrasound equipment for use in sex determination
Budgeted and itemized humanitarian goods	Unspecified or cash donations to beneficiaries or cooperating organizations
Humanitarian or service activities benefiting a community in need	Fundraising activities or expenses related to Rotary events such as district conferences, anniversary celebrations, or entertainment activities that do not include a humanitarian aspect
Secular, nonreligious activities that benefit a community in need	Projects that support purely religious functions at churches and other places of worship

Rotary Grants Available to Support District 5500 Rotary Club Projects

(Prepared by Sally Montagne, D5500 Grants Chair, August 2011)

Two types of Rotary Foundation grants support club projects for the Rotary Year 2011-2012:

1. **District Simplified Grants** – Small grants for short-term local or international humanitarian projects.
2. **Matching Grants** – International service projects involving Rotary clubs in 2 or more countries.
There will be plenty of money available for matching grants for 2011-2012.

District Simplified Grants

District Simplified Grants (DSG) – Small grants to clubs to do *new* Rotary sponsored humanitarian projects that involve the active, non-financial, participation of Rotarians and that benefit the community and/or improve the lives of those less fortunate. They may be local or international. They must be:

1. Humanitarian projects such as literacy and education, health, water, food production, job creation, and alleviation of poverty.
2. Projects that involve the active, non-financial, participation of Rotarians in the District 5500 club.
3. New projects that are not already in progress or completed. In other words, the project can not be started until the application is approved and the grant money received. These grants are to assist clubs in starting new programs. They are often thought of as “seed money” grants.
4. Rotary sponsored projects. They must have Rotary planning, oversight and administration. They can't be the projects of other groups, no matter how worthwhile.
5. International projects should be coordinated with a Rotary club in that country, although not required.

District 5500 Rules about Availability and Due Dates. (Each District has its own rules.)

1. District 5500 will match up to 100% of the club contribution, up to the maximum grant award of \$2,000.
2. These DSG applications are considered on a first come, first served basis, so long as funds remain.
In the past, we have generally had funds available until December, and occasionally into January or later.
3. The project must be short-term and designed to be completed in the current Rotary year.
4. A short application (2 pages) is posted on the District's website, www.rotaryd5500.org.
5. A chart of the kinds of activities that are eligible (and not eligible) is also on www.rotaryd5500.org and on www.rotary.org. Examples of projects that are not eligible include building or repairing an inhabited structure, salaries for project workers, underwriting fund raising events, and projects that have already started or are already annual projects of a club. These are the same eligibility rules as for matching grants.
6. The “Terms and Conditions” for all Rotary Foundation funded grants apply to District Simplified Grants as well as matching grants, and are posted on www.rotary.org and the District website.

Examples of qualifying DSG projects that clubs have completed include: (DSGs can be local or international.)

- Thesaurus' for 7th graders – Audio books for slow readers - Dictionaries for 3rd Graders (if a new club project)
- Equipment, playgrounds, furniture, books for orphanages and educational centers, both local and international
- EMT training and medical supplies for volunteer ambulance drivers in nearby Mexico
- Playground equipment for low-income neighborhoods and schools
- School back packs and/or reading materials for low-income children or schools
- Therapeutic equipment for disabled children
- Education, water, income generation, health projects in Africa, Latin America, etc.
- Food gardens and orchards (seeds, plants, fruit trees, garden tools, and fencing) for food-banks
- Books and educational supplies for prisons (both youth and adult)
- Art supplies, musical instruments, and books for an inner-city and rural art programs
- Developing a “camera club” for a low-income school with new or donated cameras, cards, and printers
- Developing, equipping, and coaching high school students to “mentor” younger kids in reading, a science program, or even a camera club.
- * Health/diabetic/obesity walking program for adults or youths with pedometers and various awards.