



## Terms And Conditions for Simplified Grants....Simplified

The Rotary Foundation (TRF) has devised rules in which the District can disperse funds from a District Simplified Grant Award (DSG). In order for you to understand these rules, we have simplified the definitions as follows:

**DSG's support the services activities or humanitarian endeavors of each club project:**

- A. Respect the wishes of the receiving community
- B. Involve Rotarians along side the Community in it's project
- C. Must be owned by the community with a Rotary Emblem prominently displayed, not paid for by the grant
- D. Have promotion of the project within the local media

### **Appropriate Grant Implementation:**

- A. The use of the funds must **not** involve the establishment of a permanent foundation, trust or interest bearing account
- B. The use of the funds must not *directly* benefit a Rotarian, A Spouse of a Rotarian, or any children or grand children of a Rotarian. No Rotarians, Rotaract, Interact, or relatives therein shall benefit from the grant.
- C. The use of the funds cannot duplicate any TRF or other Rotary Sponsored program
- D. The use of the funds must be consistent with the criteria, procedures, and policies of the Polio Plus program and the World Health Organization for projects involving vaccines and immunizations.
- E. Clubs cannot be reimbursed for projects already undertaken and in progress, an existing project, activities primarily sponsored by a non-Rotarian Organization, or for projects that are already completed.

### **Grant Funds cannot be used for the Following:**

- A. The purchase of land and buildings
- B. For construction of any structure in which individuals work, live, or engage in any gainful activity. A Profitable Venture.
- C. For renovation of Structures including plumbing, electrical, repairs of Utilities, or demolition of building.
- D. For Salaries or Labor**
- E. To Support Operating expenses of any organization
- F. For Post Secondary education activities for personal professional development.
- G. For excessive support of any one beneficiary, cooperating organization, or project
- H. For International Travel of any kind
- I. For fundraising activities
- J. Cash Donatlons**
- K. Expenses related to Rotary Events (IE: District Conferences, Club Christmas Partles, etc)**
- L. For Entertainment activities which do not include the humanitarian aspect
- M. To support any religious function.

**This is a Summary only. Condensed by Catherine Ricci, District Simplified Grants Chair, District 6960  
Original may be found at [www.rotary.org](http://www.rotary.org)**

## District Guidelines

### Time Limits (Per District Requirements)

**The District requires a report on each project within 30 days of completion of the project. All Original receipts must be handed over to the District along with the Final Reports. All projects must be done by August of the following year Grant is applied for. In other words if you apply for a grant for the 2008-09 Rotary year projects must be completed and final reports to the district by August 2009, including original receipts.**

1. District Simplified Grants Committee (DSG) is a subcommittee of the District TRF committee and shall consist of the following members:
  - DSG Committee Chair
  - District Treasurer (DT)
  - Current District Governor (DG)
  - District Governor Elect (DGE)
  - District Governor Nominee (DGN)
  - District Foundation Chair
  - District Governor Nominee Designate (DGND) when chosen (with no voting powers until officially approved by RI and the District)
  - 1 PDG at Large
  - The Immediate PDG
2. As a check and control of disbursement to Clubs, the DT shall hold all funds in a separate account as required by RI to be dispersed upon approval of the DSG Committee.
3. Approval shall be done by committee via email. A 75% majority shall be required to approve the Grant. All Grant applications shall be put in electronic form by the DSG Chair for approval. Clubs wishing faster approval shall send their paperwork via electronic form.
4. Clubs to be approved for *one* Grant at a time until the DSG Funds are used. Clubs will not be allowed 2 open DSG projects at one time.
5. Clubs will not be disbursed monies until all paperwork is complete and turned in to the DSG Chair. At the time of completion of the Grant the DSG Chair will then instruct the DT to disperse monies only after all final paperwork has been properly filled out. This is up to the discretion of the DSG Committee and can be changed for hardship clubs. In hardship cases the committee will consider dispersing funds at the beginning of the project.
6. DSG Monies cannot be used for Matching Grants or any grant non local to this District.
7. Any projects not done in a timely manner shall be forfeit. Any forfeited project is the sole financial responsibility of the club applying for the project. Projects approved by the DSG committee have no financial responsibility until the project is completed and all final paperwork is submitted to the DSG
8. All Grant applications will be considered until all DSG funds are used. As long as your project will be completed by August of the following Rotary Year and funds are available your project will be considered. Grants are approved on a first come, first serve basis. In the event of a shortage of funds, clubs annual giving may be considered as a tie breaker.
9. You must be current in your RI and District Dues and reports to be considered.
10. All original receipts must be retained by the District. Clubs should make copies for their records. All original final paperwork must also be kept by the District.
11. The DSG Chair shall be the club and AG contact and in charge of all records pertaining to the DSG. The DSG Chair shall guide the clubs to make sure projects are within the Districts and

TRF rules for DSG. The DSG Chair shall make sure all necessary paperwork is complete from each club for the grant process.

12. Grants cannot be an ongoing project
13. Grants must follow the rules as set forth by TRF and cannot be altered.
14. All Original Receipts and reports will be turned over to the DT by the DSG Chair for audit of Grant as stated by the rules of TRF and shall be retained with the District Records for 7 years as required by federal law.
15. Projects are capped at \$2500 per club per project and are matched dollar to dollar. In other words to get \$2500 for your club you must have a \$5000 project. If you put up \$1500 on a \$3000 project you can get up to \$1500. If several clubs are involved in one project then more money considerations are made. Example:

*Club A has a project and Club B has joined in. The project is a \$10,000 project. Club A being the bigger club puts up \$3500.00 and Club B being the smaller club puts in \$1500.00. These two clubs are still eligible for \$5,000 (2500 per club) because the combined efforts have come to \$5,000 on the \$10,000 project.*

16. Dictionary Projects are not included in the club cap, but they are limited to a dollar for dollar match. If you are part of a group project, that is that someone else orders your dictionaries and sends them to you, you cannot apply for a DSG for the dictionaries, they have already been funded as a group. If you are not part of a group the District will fund the club project dollar to dollar match.
17. Fund disbursements to Club and Area projects are Dependant upon TRF and their timelines for disbursing funds to the District. If your project has been approved and completed it does not necessarily mean you will receive your funds immediately. The District does not withhold funds. Once they are available to the District they will be available to the approved projects after all final paperwork has been completed.
18. All Projects, including Dictionaries must fill out the District Application to be considered.
19. All District Rules regarding the DSG program can be changed at any time and are up to the Discretion of the DSG committee.

Catherine Ricci  
DSG Chair  
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