

THE ROTARY FOUNDATION

District Simplified Grant Instructions

What are District Simplified Grants?

District Simplified Grants are a tool for Rotary districts to support short-term, humanitarian projects that benefit a community. Districts can request a portion of their District Designated Fund (DDF) for a grant to support one or multiple projects locally or internationally.

Who can apply and how?

District Simplified Grants (DSGs) are awarded to districts only. The current district Rotary Foundation committee chair and the district governor for the relevant program year must submit a completed District Simplified Grant Request and Agreement Form to The Rotary Foundation (TRF). It is strongly recommended that districts submit the request form in the Rotary year prior to the program year. A grant request must be submitted from 1 July to 31 March in any given Rotary year, and funds will be available in July of the program year.

In addition, your district Rotary Foundation committee chair must read, complete, and return the enclosed DSG Payee Information Form.

What requirements apply to DSGs?

- DSGs must comply with the Terms and Conditions of District Simplified Grant Award and Acceptance. It is available by download from the RI Web site at www.rotary.org or by contacting The Rotary Foundation or any RI international office.
- DSGs must respect the wishes of the receiving community and strive to understand and appreciate its country's traditions and culture.
- DSGs require the direct involvement of Rotarians through their:
 - Assessment of community needs and development of a project plan
 - Establishment of a committee of at least three Rotarians to oversee the expenditure of funds
 - Oversight of grant funds
 - Implementation of projects
 - Provision of evidence of community involvement and ownership

- Organization of meetings with local service providers, local officials, and/or recipients
- Promotion of projects in the local media
- For DSGs over US\$25,000, payments will be made in installments based upon a spending plan provided by the district.
- Demonstration of significant progress, defined as the submission of reports containing eligible expenditures of at least 50 percent of the total grant award, is required for one DSG before payment is made on a second DSG. Districts may administer no more than two paid-open DSGs at a time.

What are the reporting requirements?

Progress reports are required every 12 months for the duration of the grant. A final report is required within two months of the full expenditure of grant funds.

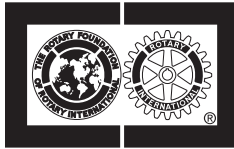
Reports must include:

- A statement of income and expense that includes a distribution list containing descriptions of the projects funded and the amounts distributed to each project
- A bank statement that correlates to the district's statement of income and expense
- An individual project summary for each project funded through the DSG. Each individual summary should include:
 - A narrative statement about the beneficiaries of the project
 - An itemized list of expenditures
 - A detailed description of the project
 - A description of Rotarian oversight, management, and involvement in the project

Independent financial reviews are required for DSGs over US\$25,000.

Districts must retain receipts, appropriately cross-referenced to the statement of income and expense, for at least three years and submit them to TRF when requested.

Failure to adhere to The Rotary Foundation policies and guidelines will result in the district returning misused grant funds in their entirety and being barred from receipt of future grants for a period up to five years.



DISTRICT SIMPLIFIED GRANT Request and Agreement Form

DISTRICT _____

FOR GRANT ACTIVITIES TAKING PLACE DURING PROGRAM YEAR 20_____ - 20_____

This District Simplified Grant Request and Agreement is entered into by the district as identified above and The Rotary Foundation of Rotary International (TRF). In consideration of receiving this District Simplified Grant (DSG) from TRF, the district agrees:

1. To use DSG funds to support short-term charitable, educational, and humanitarian projects that benefit a community. Funds provided by TRF will not be used for any purposes other than those considered eligible by TRF as described in the Terms and Conditions of DSG Award and Acceptance.
2. That it has received and read the Terms and Conditions of DSG Award and Acceptance and will abide by all stipulations set forth therein.
3. That information and requirements related to DSG will be communicated via the district Rotary Foundation committee chair and the district Rotary Foundation grant subcommittee chair to TRF.
4. To defend, indemnify, and hold harmless Rotary International (RI), TRF, their respective directors, trustees, officers, and employees (collectively "RI/TRF") from any and all damages, losses, judgments, costs, fines, awards, liabilities, or expenses, including without limitation reasonable attorney's fees and costs of litigation, asserted or recovered from RI/TRF, that result or arise directly or indirectly from the implementation of the project.
5. That this agreement may be cancelled for any reason without notice upon the failure of the district to abide by the terms set forth herein. The district agrees to return any grant funds, in their entirety including any interest earned, should funds be misused or used for ineligible purposes **and understands that it may be barred from the receipt of additional grants for up to five years.**

This agreement is governed by the laws of the State of Illinois, USA.

By signing below, I certify that District _____ acknowledges and accepts the terms of this agreement and agrees to abide by the stipulations set forth therein. I authorize US\$_____ in District Designated Funds to be identified to this grant request.

Dated this _____ day of _____ 20_____.

District Rotary Foundation Committee Chair Signature of Authorization

Print Name

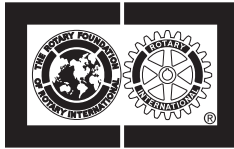
District Governor* Signature of Authorization

Print Name

*District governor in office during program year when grant activities will take place

If you have any questions about DSGs or this form, please contact the program coordinator assigned to work with your district at:

*District Simplified Grants
The Rotary Foundation
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Tel.: 847-866-3000
Fax: 847-556-2151
E-mail: contact.center@rotary.org*



DISTRICT SIMPLIFIED GRANT Payee Information Form

DISTRICT _____

FOR GRANT ACTIVITIES TAKING PLACE DURING PROGRAM YEAR 20_____ - 20_____

The following information, along with the DSG Request and Agreement Form, must be provided to The Rotary Foundation for the release of funds. The bank account must be a Rotary-controlled account. Payments will not be made payable to an individual(s), a cooperating organization, or beneficiary. Please write the *exact* name of the account. The form of payment will be based upon the geographic area. If a DSG payment is made in the form of a check, payment will be sent directly to the district Rotary Foundation committee chair. However, we recommend that districts provide all information necessary to facilitate sending funds via electronic funds transfer. The district may be held responsible for funds that are misdirected due to incomplete or incorrect payment information.

Name on the Bank Account

Account Number

Account Currency (US\$ or local currency)

Receiving Bank Name

Bank Address (including city and country)

Bank Telephone

Bank Fax

ABA Number (required for wire transfer within USA only)

Swift Code (required for international wire transfer)

IBAN and BIC (required for international wire transfer)

Other Required Codes (for international wire transfer)

For international US\$ wire transfers only you must include bank's U.S. correspondent/intermediary bank information requested below. Please contact your local bank to obtain this information.

Correspondent/Intermediary Bank Name (U.S. bank only)

Correspondent/Intermediary Bank Address (U.S. bank only)

ABA Number (U.S. bank only)

Intermediary/Correspondent Bank Telephone (U.S. bank only)

Provide the names of two Rotarians who will be the signatories on the grant account.

SIGNATORY NAME 1

Title

Address

Telephone

Fax

E-mail

SIGNATORY NAME 2

Title

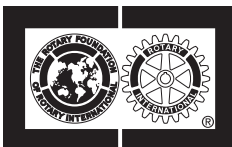
Address

Telephone

Fax

E-mail

If you have any questions about DSGs or this form, please contact the program coordinator assigned to work with your district at: District Simplified Grants, The Rotary Foundation, One Rotary Center, 1560 Sherman Avenue, Evanston, IL 60201-3698 USA; Tel.: 847-866-3000; Fax: 847-556-2151; E-mail: contact.center@rotary.org



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