



Matching Grant Travel Eligibility Information Guide

June 2010

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.*