



TERMS AND CONDITIONS OF VOLUNTEER SERVICE GRANT AWARD

YOU MUST AGREE TO THE FOLLOWING TRF REQUIREMENTS PRIOR TO IMPLEMENTING YOUR VOLUNTEER SERVICE GRANT AWARD.

I. Volunteer Service Grant Criteria

Volunteer Service Grants support the travel and participation of qualified Rotarians and spouses of Rotarians planning or implementing international service projects.

- A. Recipients of Volunteer Service Grants must comply with TRF policies regarding travel insurance.
- B. Applications should be submitted three months prior to the anticipated departure dates and be approved eight weeks prior to scheduled departure.
- C. Eligibility of traveler(s) is based on the following:
 - 1. There is a defined need within the community for the project, as identified by the host partner.
 - 2. The need can be met by the skills and experiences of the traveler(s).
 - 3. The skills and experiences to meet the community need are not available locally.
- D. Individuals traveling on their own must be active Rotarians. Small teams (up to five people) may include Rotarians and qualified spouses of Rotarians. The team leader must be an active Rotarian and a member of the international club or district sponsoring the grant.
- E. Volunteer Service Grants support the following eligible expenses:
 - 1. Economy class airfare
 - 2. Room and board
 - 3. Ancillary travel expenses
 - 4. Project-related costs, assuming that all travel expenses are less than the grant funds received.
- F. Volunteer Service Grants are a flat grant award. For individual travel, the award is \$3,000. For group travel, the award is US\$6,000.
- G. Volunteers must be on site a minimum of five days and a maximum of 60 days (not including travel days). If the volunteer wishes to stay at the project site for more than 60 days, all expenses incurred become the responsibility of the volunteer.
- H. An individual's volunteer efforts cannot be supported with grant funds more than two times per Rotary year. Individuals or teams of qualified individuals may serve through a single grant application.
- I. A single project site may not benefit from more than one grant award at any given time. If necessary, incoming traveler(s) to a project site may overlap with outgoing traveler(s) for three days for the purposes of training.
- J. Airfare must be managed by Rotary International Travel Service (RITS) and travel arrangements must be made immediately after notification of approval and no less than 45 days before departure. If this is not adhered to, the travel dates will need to be changed or the grant may be subject to cancellation in accordance with the RI Travel Policy.
- K. Volunteer Service Grants must include international travel and cannot be used solely for in-country expenses.

II. Volunteer Service Grant Rotarian Involvement

Rotarians from both partner clubs/districts must be actively involved in each Volunteer Service Grant project and are responsible to The Rotary Foundation (TRF) for the conduct of the project and for reporting on it. Rotarian activities in relation to the grant project must be reported to TRF.

- A. Members of the host partner club or district are expected to:
 - 1. Organize meeting(s) with local service providers and/or local officials for visiting Rotarians
 - 2. Offer accommodations in the homes of local Rotarians. If this is not possible, arrange hotel accommodations for visiting Rotarians
 - 3. Assist with local transportation
 - 4. Visit the project site and/or volunteer at the project site
 - 5. Invite visiting Rotarian(s) to speak to local Rotary clubs
- B. Members of the international partner club or district are expected to:
 - 1. Establish communication with members of the host partner club or district
 - 2. Publicize the volunteer service/planning mission in the media
 - 3. Organize presentations about the grant

III. Volunteer Service Grant Funding and Payment

The following conditions apply to the release of payment for Volunteer Service Grants:

- A. Payment will not be released until the Rotary International Travel Service (RITS) has notified The Rotary Foundation that travel arrangements have been secured through either ticket purchase or local purchase authorization.
- B. Release of payment is contingent upon receipt of information regarding an appropriate payee for the grant. Please note that:
 - 1. Volunteer Service Grants must be paid to a Rotarian controlled account, preferably, an account established for the project.
 - 2. Volunteer Service Grants will not be paid to a benefiting organization or cooperating organization.
- C. If the airfare is purchased by RITS, TRF will issue a payment in the amount of the grant award less the airfare amount. If RITS authorizes local purchase, TRF will issue payment for the full grant amount.

IV. Stewardship of The Rotary Foundation Funds

Volunteer Service Grant Recipients and Sponsors must:

- A. Treat The Rotary Foundation grant funds as a sacred trust to be constantly safeguarded from loss, misuse, or diversion.
- B. Assure competent and thorough oversight of the project with clear delineation of responsibility, proper fiscal management, and full transparency regarding project activities and financial transactions;
- C. Use The Rotary Foundation grant funds only for eligible purposes as outlined in TRF established grant criteria.
- D. Conduct all financial transactions and project activity relating to the grant at least at the level of standard business practices and always in consonance with the "Declaration of Rotarians in Business and Professions" and in the full spirit of "The Four Way Test." This requires:

1. Maintaining regular accounts of all transactions, retaining original receipts and invoices for a minimum of five years (or more if required by local law/regulations)
 2. Keeping grant funds in the established project account without diversion, except for direct payment of project expenses and/or to return funds to TRF; and
 3. Establishing an inventory system for the control of any items purchased with grant funds, and maintaining records for items purchased, produced, and/or distributed through the project.
- E. Exercise the highest care to the prevention of even the appearance that The Rotary Foundation grant funds are being used in an improper manner. Such care is expected to go beyond that afforded to the use of private or corporate funds.
- F. Report immediately any irregularity in grant related activity to The Rotary Foundation.
- G. Disclosure of any possible conflicts of interest. All individuals involved in a program grant and/or award shall conduct their activities in a way that avoids any actual or perceived conflict of interest. A conflict of interest is a relationship among individuals through which an individual involved in a program grant or award causes benefit, or could be perceived to cause benefit, for such individual or such individual's family, personal acquaintances, business colleagues, business interests, or an organization in which such an individual is a trustee, director, or officer. Any and all disclosures must be explained prior to grant approval;
- H. Officers and paid staff of a cooperating organization associated with a Volunteer Service Grant are not eligible to receive a grant for travel.

V. Reporting Requirements

TRF requires Volunteer Service Grant Recipients to adhere to the following:

- A. The international project contact must submit a completed final report within two months of return. The final report shall include the following:
1. A narrative statement describing the service that was provided and/or the planning activities that were completed.
 2. A statement on the international partner club or district involvement in the project.
 3. A statement about how the community's needs were met by the volunteer service or planning mission.
 4. An itemized financial statement detailing how grant funds were expended with receipts for single expenditures over US \$75.
 5. An authorizing signature from the international primary project contact.
- B. The host club or district must provide a post-service evaluation within two months of completion of the project. The post-service evaluation shall include the following:
1. A narrative statement describing the service that was provided and/or the planning activities that were completed.
 2. A statement on the host partner club or district involvement in the project.
 3. An evaluation of the sustainability of the project and the impact that this project had on the host Rotary club or district.
 4. An evaluation of the performance of the visiting Rotarians.
 5. An authorizing signature from the host primary project contact.
- C. Failure to provide acceptable reports on previous grants in a timely manner will result in the sponsors (both international and host where appropriate) not being able to initiate new projects.
- D. Recipients of Volunteer Service Grants must cooperate with TRF audits.

1. The Rotary Foundation reserves the right to conduct an audit of any grant, regardless of size, at any time.
2. In addition, TRF reserves the right to review the project at any time, require the submission of additional documentation, requests funds to be returned, and suspend any or all payments if in its sole discretion progress is not considered to be satisfactory. Failure to provide accurate and timely reports could result in barring from future grants the sponsoring clubs or districts and the individuals who traveled, until TRF receives an acceptable report.

VI. Appropriate Grant Implementation

A. The use of grant funds from The Rotary Foundation must:

1. Promote active and personal participation of all Rotarians involved in the project.
2. Assist in the development of stronger Rotary networks as clubs from different communities and/or nations work together to implement projects that have been initiated or endorsed by a Rotary club in a project location. Projects which receive TRF support should satisfy the real humanitarian needs of the receiving community.
3. Not involve the establishment of a permanent foundation, trust, or permanent interest-bearing account.
4. Not directly benefit a Rotarian; an employee of a club, district, other Rotary entity, or of Rotary International; or a spouse, lineal descendant (child or grandchild by blood or legal adoption), a spouse of a lineal descendant, or an ancestor (parent or grandparent by blood) of any living Rotarian or Rotary employee.
5. Exclude any liability to The Rotary Foundation or to Rotary International except for the amount of the grant.
6. Be consistent with the criteria, procedures, and policies of the Polio Plus program and the World Health Organization for projects involving vaccines and immunizations.
7. Not be used to reimburse clubs/districts for projects already undertaken and in progress, an existing project, activities primarily sponsored by a non-Rotary organization, or for projects that are already completed. The Rotary Foundation will only fund projects that have been reviewed and approved by the Trustees of The Rotary Foundation prior to their initiation.

B. Grant funds cannot be used:

1. For the purchase of land and buildings. If the grant depends upon the construction of a building, the construction must be funded by additional (that is non-matched) club/district funds or funded by a cooperating organization. The Rotary Foundation will not release grant funds until such construction is completed;
2. For activities involving the construction of any structure in which individuals live, work, or engage in any gainful activity (such as buildings, containers, and mobile homes) or structures where individuals carry out any type of activity including manufacturing, processing, maintenance and/or storage. Activities involving construction of infrastructure such as service roads, wells, reservoirs, dams, bridges, latrines, toilet blocks, and water supplies and other similar structures are acceptable;
3. For activities involving the renovation of structures, including the provision of new services or upgrade of utilities (i.e. electrical & plumbing), in which individuals live, work, or engage in any gainful activity (such as buildings, containers, and mobile homes) or structures where individuals carry out any type of activity including manufacturing, processing, maintenance, and/or storage;
4. For salaries, stipends or honorariums for an individual or individuals working for a cooperating organization or beneficiary;

5. To support the operating or administrative expenses of any organization;
6. For post-secondary education activities, research, or personal or professional development;
7. For excessive support of any one beneficiary, cooperating organization, or project.
8. For unspecified or cash donations to beneficiaries. Grant funds must be used to purchase humanitarian goods;
9. For expenses related to Rotary events such as district conferences or anniversary celebrations;
10. For entertainment activities that do not include a humanitarian aspect;
11. As donations to cooperating or benefiting organizations; and
12. To support purely religious functions at churches and other places of worship.
13. Grant funds cannot be used as a contribution to The Rotary Foundation or as a contribution for any Humanitarian Grant.

VII. Time Limits

- A. The Humanitarian Grant Staff must be informed of any changes including project dates, project activities, project contacts, and team members. If travelers wish to change team members or travel dates, they must do so no less than 45 days before departure.
- B. Applications should be received at least three months prior to departure to allow for adequate processing time.

VIII. Cooperating Organizations

A grant conducted in cooperation with another organization must meet the following conditions:

- A. The Rotary club/district sponsor(s) must clearly demonstrate that the project is initiated, controlled and conducted by the Rotary clubs or districts involved; Rotarians must participate in giving their time, resources, and personal involvement to the project.
- B. Both Rotary club/district co-sponsors and the local Rotary clubs or district (where appropriate) must have knowledge of the cooperating organization and provide a letter of endorsement for the organization which states that it is reputable and responsible, and that the organization is registered and acts within the laws of the project country.
- C. The organization cooperating in such projects must agree to participate and cooperate in any financial review relating to the project and explain how they will be participating in the project.
- D. An annual limit of eight grants can be made in cooperation with another organization.

IX. The Rotary Foundation's Policies on Population Growth and Development

The Rotary Foundation (TRF) supports the programs of Rotary International, including their aims and objectives with respect to RI's statement on Population Growth and Development. Individuals supported by a Volunteer Service Grant may participate in activities associated with population growth projects that involve:

- A. Pre-natal medications/vitamins
- B. Birthing medications
- C. Newborn baby screenings
- D. Surgical instruments to help with births
- E. Pre-natal screening
- F. Ultrasound equipment (as long as it is used for diagnosing and treating patients)
- G. Education and Training
- H. Public health education

- I. Family planning training
- J. Information on sexually transmitted diseases
- K. Community health training
- L. Balanced diet and nutrition awareness

X. Rotary Name and Emblem Use Guidelines

The following guidelines on the use of the "Rotary" name and emblem are RI policy. Please follow them when naming your project and in any literature you may develop.

A. Rotary Name

1. The RI Board has determined that any use of the "Rotary" name without a further qualifier, such as the name of a Rotary club or a Rotary district, refers to the international association, RI.
2. New project names or programs not under the exclusive control of RI, when using the name, "Rotary," must include the name of the participating Rotary club(s) or district(s) and should not use the name, "International."
3. If using the words, "Rotary," and "Foundation," these words must not appear together, but must be separated by additional identifying information, such as the name of the participating Rotary club(s) or district(s).
4. Ongoing programs not under the exclusive control of RI and not conforming to these guidelines should be renamed to provide this additional identifying information (i.e. the name of the participating Rotary club(s) or district(s) must be included when using the name "Rotary").
5. The naming of any project or program that does not conform to the guidelines must receive specific RI Board approval.

B. The Rotary Emblem

1. The Rotary Emblem, like the Rotary Name, represents the international association, RI.
2. Whenever the Rotary Emblem is used for a project, program or activity not under the exclusive control of RI, the name of the participating club(s) or district(s) must also be used in addition to the emblem; must appear directly adjacent to the emblem; and be of a size of equal prominence to the emblem.
3. Any reproduction of the Rotary Emblem must meet RI's proper emblem specifications.
4. Camera-ready art can be obtained through your Club and District Administration Supervisor.
5. No alterations, modifications or obstructions of the Rotary Emblem are permitted. The emblem must be faithfully reproduced and always appear in its entirety.
6. The RI Bylaws discourage any joint use of the RI Emblem with the emblem or logo of another organization. The use of such name, emblem, badge or other insignia in combination with any other name or emblem is not recognized by RI.

If you have questions about Volunteer Service Grants, please contact the Humanitarian Grant Staff at:

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