

# “Top 10 Reasons Matching Grant Applications Are Held Up”

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*While there are several WCS activities conducted around the world without matching grants, many Rotary humanitarian service projects are done with funding aid from the Rotary Foundation. From time to time Rotarians express frustration with the long lead times and delays in the processing of matching grant applications. Following are the top ten reasons applications are delayed:*

**1**

**Sponsors send in contributions *PRIOR* to grant approval.**

It is hard to understand why money is remitted before a project is processed. This causes many complicated and time-consuming administrative difficulties. Staff spend many countless hours, trying to locate funds remitted several months prior, without an approval or project number. To avoid misapplication of funds and unnecessary accounting delays, please do not send in money before the Trustees approve the application.

**2**

**Project contacts do not use MG numbers assigned to their application.**

With over 3,000 open files in process at any point in time and over 70% increase in applications received, it is important to use a good tracking system. It can be very time consuming and difficult to locate a specific application file when someone calls or requests information without their reference number.

**3**

**All proper authorities have not signed letter of support.**

District Governor(s) and/or Club President(s) must sign the appropriate forms and in correct places as required.

**4**

**Rotarians do not always use up-to-date application forms**

or follow the latest guidelines and requirements provided. Rotary publications and application forms contain specific guidelines and instructions, however many Rotarians do not seem to read or follow them. The most recent forms can be downloaded from website: [www.rotary.org](http://www.rotary.org) or received by the Fax Back Service (in US/Canada only) at (503) 721-3094.

**5**

**No pro-forma invoices or price quotations are supplied** and staff must write

back to obtain them. For some reason, many applicants do not submit the required pro-forma invoices for all items valued at a total cumulative cost of US \$1,000 or more. To avoid confusion, it is a good idea to organize the invoices so they clearly correspond with the line items in the budget.

6

**The official R.I. rate of exchange is not used. It's better to leave the budget in local currency and let staff identify the US\$ equivalent.**

Staff prefers receiving the project budgets in local currency. When reviewed, the official R.I. rate of exchange is applied to the application. When clubs use their own rate, all numbers on the application may be incorrect.

7

**Ineligible costs are included in the project budget.**

Sponsors should read the guidebook before submitting the application. Project budgets often include ineligible expenses such as administration expense, international travel, salaries, or construction of buildings. Delays are caused because R.I. staff must send out letters, reminding clubs of criteria and requesting revised budgets.

8

**Incorrect payee or wire transfer information.**

After a payment has been processed, sponsors often inform staff of an error in the payment information they provided. This can cause countless hours of tracking down the payment request, then canceling it and resubmitting the revised payment information.

9

**All projects are of equal importance but too often Rotarians ask for their application to be a top priority.**

Rotarians often ask staff to put a "RUSH" on their application. Of course each application is important and when staff is asked to speed up the process for one proposal, this slows down the process for all other projects. Rush requests have become the norm (about 3-5 a day) and the "please rush" pile gets as big as the "regular" pile.

10

**Rotarians do not communicate with each other or there are too many Primary Project Contacts.**

Members also contact Rotary Foundation Staff rather than each other. It is not uncommon for staff to get 5 calls a day (each), asking if a matching club or district has completed their forms. Often there are several calls within a day requesting information on the same project. It would help if Primary Contacts could communicate more with each other and pass on updates to all other interested parties. This would cut down on phone calls, enabling staff to process grant applications more efficiently. ●

*Rotarians can streamline the system by trying to prevent the above problems and following the guidelines described with the matching grant application forms. With accurate and complete information, Rotary staff can be more efficient in processing the documents for approval with a minimum of delay.*



For information on W.C.S. projects see:

[http://www.rotary.org/programs/international/world\\_community\\_service/](http://www.rotary.org/programs/international/world_community_service/)