

Matching Grants Eligibility Criteria and Guidelines

1. **Matching Grant projects are international service projects. The Grant project must**
 - a. provide for humanitarian needs to benefit the economically disadvantaged, and provide assistance that is not being met by local and/or other sources.
 - b. have significant Rotarian involvement.
 - c. have visible Rotary identification.
 - d. demonstrably benefit no less than six individuals directly.
 - e. benefit the recipient community as a whole. The project must not be designed to help any individual(s) to obtain an academic degree or professional advancement, or for any individual(s) to attend a seminar, conference or international exchange. *Projects can involve educational training, but the training must be short-term in nature and provide for basic educational needs only.*
 - f. must not involve the establishment of a permanent foundation, trust, or permanent interest-bearing account. *Grant projects can involve the establishment of a revolving loan fund, but must include training and detailed information regarding recipient pay-back schedules.*
 - g. involve participation and monitoring by Rotarians of clubs/districts in at least two countries. One country will be the project (benefiting) country, and one will be the international sponsoring country. Grant applicants are partners in the service project and must work together closely to complete the project. To ensure this kind of cooperation, each participating club/district must establish a committee of at least three Rotarians to oversee and report both to each other every six months and to The Rotary Foundation on the project's progress and completion.
 - h. not directly benefit a Rotarian; an employee of a club, district or other Rotary entity, or of Rotary International; or a spouse, lineal descendant (child or grandchild by blood or legally adopted child), a spouse of a lineal descendant, or an ancestor (parent or grandparent by blood) of any living Rotarian or Rotary employee.
 - i. not duplicate any existing Foundation or other Rotary-sponsored program.
 - j. *exclude any* liability to The Rotary Foundation or to Rotary International except for the amount of the grant.
 - k. *must be distinct, i.e., of a different type or category of project from any other* projects for which the same applicants have already received a Matching Grant within the past five Rotary years. (This does not prevent the replication of successful projects that benefit different communities.)
2. **Matching Grant funds (which includes club/district funds to be matched by the Foundation) cannot be used**
 - a. for the purchase of land or buildings or the construction of substantial buildings.

* Acceptable construction projects include service roads, wells, reservoirs, dams, latrines, toilet blocks, and water supplies. These projects are eligible as long as the construction is not a structure in which individuals live, work, or spend a substantial amount of time such as buildings, containers, and shelters or carry out any type of activity, such as schools, hospitals, and clinics, including any type of manufacturing, processing and/or storage. Repairs, renovations, and/or restorations of existing construction are eligible only if they are not changing the scope of the original construction. If the Grant project depends upon the construction of a building, that construction must be funded by additional (that is, non-matched) club/district funds or funded by a cooperating organization. The Foundation will not release Matching Grant funds until such construction is completed.

** There is one exception to the construction policy and that is, beginning 1 July 1997 through 30 June 2000, The Rotary Foundation will award Matching Grants, Helping Grants, and 3-H Grants for the construction of shelters for underprivileged families. Please request the guidelines for such shelters from The Rotary Foundation.*
 - b. for the payment of salaries or other personnel costs (other than necessary, one-time-only contracted technical expertise).

- c. for individual travel expenses of any kind, unless the travel is essential and integral to the projects implementation. In such cases, only ten percent of the project's budget may be used for individual travel expenses.
 - d. to support the operating/administrative expenses of any organization.
- 3. **Contributions from the participating clubs/districts must be at least equal to the amount being requested from The Rotary Foundation. In addition, at least half of the club/district contributions must come from outside the project site country.** *Projects can be supplemented by funds from non-Rotary sources; however, the Foundation cannot match such funds. The Foundation will only match funds contributed by Rotary clubs/districts. In addition, the Foundation will not match the value of any goods donated to the project.*
- 4. **The Rotary Foundation will not use Matching Grant funds to reimburse clubs/districts for projects already undertaken and in progress, or for projects that are already completed. The Foundation will only match club/district funds for international service projects that have been reviewed and approved by the Trustees of The Rotary Foundation prior to their initiation.**
- 5. If a Matching Grant project will be conducted in cooperation with another non-Rotary organization, the following conditions must be met:
 - a. There must be significant Rotarian involvement which includes substantial numbers of Rotarians actively participating by giving their time, resources, and personal involvement in the project.
 - b. The Rotary sponsor(s) must clearly demonstrate that the project is initiated, controlled and conducted by Rotary clubs or districts involved, although non-Rotary participation is permitted.
 - c. The project must have clearly visible Rotary identification designed to make the public aware of Rotary involvement.
 - d. Both Rotary co-sponsors and local Rotary clubs (where appropriate) must have knowledge of and endorse the non-Rotary organization as being reputable and responsible, and have determined that the organization is registered and acts within the laws of the project country.
 - e. Matching Grant funds will not be provided to an existing project nor for activities primarily sponsored by a non-Rotary organization.
 - f. The non-Rotary organization cooperating in such projects must agree to participate and cooperate in all financial review activities connected with the project.

Note: The Rotary Foundation Trustees have determined that no more than eight (8) Matching Grant projects conducted with a single non-Rotary cooperating organization will be awarded each Rotary year. Applications for projects conducted with a single cooperating organization will be approved on a first-come, first-served basis.

- 6. The dollar limit for competitive Matching Grants has been raised. Competitive Matching Grants are now from US\$25,001 to US\$50,000 and are considered by the Trustees two times per year. Grant requests of US\$25,000 or less are considered throughout the Rotary year as the applications are complete.
- 7. Annual independent financial reviews are required for all competitive Matching Grants (\$25,001+). Awardees of competitive grants may apply for up to US\$500 per year for the life of the project in the event that they cannot provide for the costs of such reviews.
- 8. The District Governor in the *project* country will no longer be required to endorse each Matching Grant project a club in the District sponsors unless SHARE District Designated Funds will be used.
- 9. Matching Grant budget detail must be supported by pro forma invoices, supplier price quotes and/or other cost documentation for all items valued at total cumulative cost of US\$1,000 or more.