

# International Matching Grants

## Things to Do to Make Your Matching Grant Go Smoothly

**Purpose:** *The Guide to Matching Grants* (144-EN-(210)) is the “bible” for Matching Grants. However, there are things we can do to make our Matching Grant Applications go smoother. This document is intended to identify things that may or may not be in *The Guide to Matching Grants*; anything we can do to make our applications clearer will pay benefits in fewer questions from The Rotary Foundation staff as well as reducing the opportunity for the information in your application to be improperly entered in the TRF database. In an era of reduced Matching Grant funding, anything that prolongs the process works against our getting our matching funds from the World Fund.

### Items to Watch For:

1. Read and follow *The Guide to Matching Grants*! Read and answer the questions! This should be obvious but many an application gets “hung up” because the required information is missing or ambiguous.
2. Rotarian involvement from ALL PARTICIPATING CLUBS is mandatory. Make sure you address what all the partners will do at the bottom of Page 1. TRF is looking for at three kinds of participation. Examples of acceptable participation and oversight are:
  - Managing project funds
  - Visiting the project site on an as-needed basis
  - The international and host partners sharing information via correspondence
  - The partners sharing expertise
  - Purchasing, shipping, or distributing items purchased
  - Publicizing the project to local media and the district
3. On Pages 2 and 3 “Host and International Partner” data, there are some things you can do to simplify things for the TRF Staff.
  - Use your club’s official name (i.e., the name Rotary International knows you by); this may not be the name you use most of the time. For example, Farmington San Juan should use their “official” name of “San Juan County East”. To further reduce confusion, add a dash and the club number, such as “Albuquerque – 1291”.

- Use your members' names as listed in the Club Recognition Summary. The CRS will also give you your members' RI account numbers. Your Club President, Secretary and Foundation Chair have access to the CRS. The Rotary Contact Center (866-976-8279 or [contact.center@rotary.org](mailto:contact.center@rotary.org) ) can also provide the members' RI account numbers.
  - The members listed on Page 2 and 3 must agree item for item with the data on Page 7 "Authorizations".
  - You can further reduce confusion by putting the surname in CAPITAL letters.
4. On Page 5 "Project Financing" there are number of opportunities for errors and confusion. Use the "official" RI club name for ALL participating clubs; it is very important to include the club number as I discussed above. This will ensure that all participants are correctly identified with their participation.
- Very often, especially at TriDistrict, the information on this page is handwritten which increases the opportunity for errors. When submitting your application, type a duplicate page with ALL of the information included; where DRFC and DG signatures would be type "See Attached". Then include the signed page AFTER the typed, smooth Page 5.
  - At least 50% of the project funds BEFORE the TRF match must come from outside the host country. This means 50% of the sum club funds and DDF must come from outside the host country.
  - For FY2012, the D5520 DRFC is "Tom Walker" and the D5520 DG is "Bobby Wallace".
  - After the DRFC and DG have signed Page 5 authorizing use of District Designated Funds (DDF), you may have to resize your project. If you require ADDITIONAL DDF, you must resubmit Page 5 to the DRFC and DG for approval; however, should you require LESS DDF, you may line through the original amount and insert a LESSER amount. You must inform the DRFC of this change!
  - Double check your numbers! The bottom line funding must match the bottom line number on Page 4 "Project Budget".
5. On Page 7 "Authorizations" the information must agree item for item with the data on Pages 2 and 3 "Host and International Partner".
- If the information on Page 7 is handwritten (as it may be at TriDistrict) prepare a typed, smooth Page 7. Just as discussed on Page 5 where signatures would be insert "See Attached". Then insert the handwritten copy with signatures after the smooth copy.
  - If your Club President signs the Authorization Page then you are the Host Club or the International Host Club. MAKE SURE YOU UNDERSTAND THE

RESPONSIBILITIES OF THE HOST/INTERNATIONAL HOST CLUB. As a minimum you must have the Points of Contact for EVERY PARTICIPATING club in your country since you are responsible for communicating with all those clubs! It probably would be wise to have copies of Pages 2 and 3 as well as the TriDistrict Project Signup Form for each participating club!

6. On Page 8 you will identify the individual responsible for completing the project's Final Report. Normally, this would be a member of the Host Club but could be a member of the International Host Partner.
  - BOTH THE HOST AND INTERNATIONAL HOST CLUB are responsible for timely reporting of the project! Failure to submit timely reports will preclude BOTH CLUBS from submitting further Matching Grant applications. Additionally, projects in delinquent reporting status count against the District's reporting statistics; should D5520's reporting statistics fall below 70% for four consecutive quarterly periods, we could lose the ability to participate in Matching Grants.
7. On Page 8 the District Grant Subcommittee Chair (DGSC) must review and approve the application. For D5520-hosted projects, Ron Salley, the D5520 DGSC will review the application once ALL required information has been assembled and included in the application.
8. Complete the Page 9 "Completion Checklist." In the Microsoft Word version of the application, left click on the "box", select "Properties" and then select "Checked." If one of the questions is "Not Applicable", strikethrough the question by highlighting the question, left clicking, selecting "Font" and "Strikethrough."
9. If you have questions, contact me!

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