



# The Rotary Foundation (TRF) Major Matching Grants Application

*For grant requests of US\$2,001 to US\$150,000*

Rotarians may use this form and attach additional pages as needed or may answer the questions below on blank paper, on the condition that the answers follow the same order as the application. *Incomplete applications will be returned to the primary host partner with a brief explanation. See The Guide to Humanitarian Grants (144-EN) for instructions and eligibility and program requirements.*

**Note:** Applications for **low-cost shelter** and **revolving loan** projects and **grant requests of US\$25,001 or more** have additional requirements. See The Guide to Humanitarian Grants (144-EN), [www.rotary.org](http://www.rotary.org), or contact TRF staff for more information.

## 1. PROJECT DESCRIPTION

1. What is the purpose of this project? Provide a brief description.
2. How will it meet the needs of the community?
3. How will the host and international partners communicate and work together to implement this project? Please provide specific examples of activities.

## 2. COOPERATING ORGANIZATIONS

If this project involves a cooperating organization:

1. Provide the *name* of the organization below.
2. Attach a *letter of participation* from that organization that specifically states its responsibilities, how it will interact with Rotarians in this project, and the organization's agreement to cooperate in any financial review of activities connected with the project.
3. Attach a *letter of endorsement* of the organization from the Rotarians in the project country.

Name of organization \_\_\_\_\_

Letter of participation from organization attached     Letter from project country Rotarians attached

## 3. RELATIONSHIP TO OTHER RI OR TRF PROJECTS (OPTIONAL)

Is this project related to, or has it resulted from, other Rotary International or TRF projects? If so, please identify those projects.

Program	Individual's Name and/or Project Number	Program	Individual's Name and/or Project Number
WCS Projects Exchange		Group Study Exchange	
Individual Grant		Ambassadorial Scholarships	
3-H Grant		District Simplified Grant	
Matching Grant		Other:	

Could this project benefit from an international volunteer?  Yes     No

#### 4. PRIMARY HOST PARTNER IN THE PROJECT COUNTRY

List the club or district *in the project country* that assumes joint responsibility for the project.

CLUB \_\_\_\_\_ CLUB ID NUMBER (IF KNOWN) \_\_\_\_\_ DISTRICT \_\_\_\_\_ COUNTRY \_\_\_\_\_

**Project Committee:** A committee of at least two Rotarians must be established by the primary host partner to oversee the project for its duration, even if it continues into another Rotary year.

**Primary Contact** (must be member of above club/district)

Name \_\_\_\_\_  
MEMBER ID NUMBER (IF KNOWN) \_\_\_\_\_

Rotary club \_\_\_\_\_  
DISTRICT \_\_\_\_\_

Position/title \_\_\_\_\_

E-mail \_\_\_\_\_

Address \_\_\_\_\_  
STREET ADDRESS \_\_\_\_\_

CITY / STATE / POSTAL CODE \_\_\_\_\_

COUNTRY \_\_\_\_\_

Telephone \_\_\_\_\_  
HOME \_\_\_\_\_

OFFICE \_\_\_\_\_

Fax \_\_\_\_\_

**Additional Contact**

Name \_\_\_\_\_  
MEMBER ID NUMBER (IF KNOWN) \_\_\_\_\_

Rotary club \_\_\_\_\_  
DISTRICT \_\_\_\_\_

Position/title \_\_\_\_\_

E-mail \_\_\_\_\_

Address \_\_\_\_\_  
STREET ADDRESS \_\_\_\_\_

CITY / STATE / POSTAL CODE \_\_\_\_\_

COUNTRY \_\_\_\_\_

Telephone \_\_\_\_\_  
HOME \_\_\_\_\_

OFFICE \_\_\_\_\_

Fax \_\_\_\_\_

#### 5. PRIMARY INTERNATIONAL PARTNER OUTSIDE THE PROJECT COUNTRY

List the club or district *outside the project country* that will assume joint responsibility for the project.

CLUB \_\_\_\_\_ CLUB ID NUMBER (IF KNOWN) \_\_\_\_\_ DISTRICT \_\_\_\_\_ COUNTRY \_\_\_\_\_

**Project Committee:** A committee of at least two Rotarians must be established by the primary international partner to oversee the project for its duration, even if it continues into another Rotary year.

**Primary Contact** (must be member of above club/district)

Name \_\_\_\_\_  
MEMBER ID NUMBER (IF KNOWN) \_\_\_\_\_

Rotary club \_\_\_\_\_  
DISTRICT \_\_\_\_\_

Position/title \_\_\_\_\_

E-mail \_\_\_\_\_

Address \_\_\_\_\_  
STREET ADDRESS \_\_\_\_\_

CITY / STATE / POSTAL CODE \_\_\_\_\_

COUNTRY \_\_\_\_\_

Telephone \_\_\_\_\_  
HOME \_\_\_\_\_

OFFICE \_\_\_\_\_

Fax \_\_\_\_\_

**Additional Contact**

Name \_\_\_\_\_  
MEMBER ID NUMBER (IF KNOWN) \_\_\_\_\_

Rotary club \_\_\_\_\_  
DISTRICT \_\_\_\_\_

Position/title \_\_\_\_\_

E-mail \_\_\_\_\_

Address \_\_\_\_\_  
STREET ADDRESS \_\_\_\_\_

CITY / STATE / POSTAL CODE \_\_\_\_\_

COUNTRY \_\_\_\_\_

Telephone \_\_\_\_\_  
HOME \_\_\_\_\_

OFFICE \_\_\_\_\_

Fax \_\_\_\_\_

## 6. PROJECT BUDGET

Include a complete itemized budget for the entire project and indicate which currency is used. Please answer the questions provided about purchase of equipment, materials, or supplies. Use separate pages if necessary. **Pro forma invoices, supplier price quotes, and/or other cost documentation may be required upon request.**

Item to be purchased	Name of supplier	Cost

Total (identify currency) \_\_\_\_\_

Exchange rate used \_\_\_\_\_

## 7. PURCHASE OF EQUIPMENT

1. Who will own equipment and maintain, operate, and secure items purchased with grant funds? (Equipment cannot be owned by a Rotary club or Rotarian.)
2. Is software necessary to operate any budget items? If so, has software been provided?
3. Will training in use and maintenance of technical equipment be provided?
4. If budget items will be shipped, have arrangements been made for customs clearance?

## 8. PROPOSED FINANCING

If *SHARE* District Designated Funds (DDF) are part of the funding for this Major Matching Grant, either attach a letter(s) from the **district Rotary Foundation committee (DRFC) chair(s)** authorizing the use of those funds and specifying the amount *or* have the DRFC chair(s) authorize the use of the *SHARE* funds by signing below. **Only the chair, on behalf of the DRFC, can authorize the use of *SHARE* DDF.** Please list all financing and indicate *cash* or *SHARE (DDF)* amounts.

Rotary Club/District	Amount Contributing (identify currency)	Cash or DDF		DRFC Chair Authorization
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____

SUBTOTAL \_\_\_\_\_

Amount requested from The Rotary Foundation \_\_\_\_\_

Additional funding from other sources \_\_\_\_\_

TOTAL \_\_\_\_\_ (Must be equal to budget cost)

## 9. COMMUNITY NEEDS ASSESSMENT (FOR GRANT REQUESTS OF US\$25,001 TO US\$150,000)

If your grant request is for US\$25,001 or more, a **community needs assessment** must be included. This assessment should demonstrate how the proposed project

- Is viable and can be maintained by the benefiting community after grant funding has been fully expended
- Involves the benefiting community, including its ownership of the project

Please refer to *The Guide to Humanitarian Grants* (144-EN) for additional information.

Community needs assessment attached

## 10. PARTNERSHIP AUTHORIZATION

All Rotary clubs or districts involved in this project are responsible to The Rotary Foundation (TRF) for the conduct of the project and reporting on it. The partners' signatures confirm that they understand and accept responsibility for the project. Partners may either sign this page or submit a separate letter of commitment.

**By signing below, we are agreeing to the following:**

- All information contained in this application is true and accurate, to the best of our knowledge.
- This application meets all Matching Grant criteria as stated in *The Guide to Humanitarian Grants* (144-EN).
- The club/district has agreed to undertake this project as an activity of the club/district.
- We will ensure all cash contributions (as detailed in item 8) will be forwarded to TRF **after** Trustee approval of a Matching Grant.
- We understand that if our club/district or our partner club/district has overdue progress or final reports for any previously awarded Matching Grants, this application will be returned to the host partner.

### Host Partner

- Club President (if club-sponsored)  
 District Grants Subcommittee Chair (if district-sponsored)

NAME

TITLE

CLUB DISTRICT

SIGNATURE DATE

### International Partner

- Club President (if club-sponsored)  
 District Grants Subcommittee Chair (if district-sponsored)

NAME

TITLE

CLUB DISTRICT

SIGNATURE DATE

## 11. DISTRICT GRANTS SUBCOMMITTEE CHAIR CERTIFICATION

The Trustees strongly suggest that the district grants subcommittee chair from either the host or international district certify the application as complete. *If the application is not complete or eligible, it will be returned to the host partner with a brief explanation.*

"On behalf of the committee, I hereby certify that to the best of my knowledge and ability this grant application is complete and meets all TRF guidelines."

DISTRICT GRANTS SUBCOMMITTEE CHAIR SIGNATURE

DISTRICT

## 12. REPORTS

Although *both* partners are ultimately responsible for completing progress and final reports, one partner should take primary responsibility for submitting the reports to TRF.

"By signing below, our club/district accepts primary reporting responsibility."

SIGNATURE

CLUB

DISTRICT

### 13. COMPLETION CHECKLIST

Before submitting your Major Matching Grants Application, please take a moment to review this checklist. If you have any questions or concerns, please contact TRF staff (see below).

- Are there written sponsorship confirmations from the club president(s)/district leadership who will be in office during the year of the funding request?
- Does the project meet **all** grant policies and guidelines (see *The Guide to Humanitarian Grants* [144-EN] or the RI Web site at [www.rotary.org](http://www.rotary.org))? Does the project description clearly state how the project will assist those in need?
- Have both the host and the international partner created committees to oversee the project? Are these individuals correctly listed on the application?
- Have the responsibilities of the project country partner and international partner been outlined? Do they meet the requirements of a Matching Grant project?
- Are there written commitments (or signatures on section 10 of the application) from each primary project partner? If *SHARE* District Designated Funds (DDF) are used, the current district Rotary Foundation committee chair must provide a written confirmation authorizing use of DDF (or signature on section 8 of the application).
- Is a cooperating organization involved? If so, are there letters from 1) the organization, specifically stating its responsibilities, how it will work with Rotarians, and its agreement to cooperate with any financial review of the project; and 2) the primary host partner, indicating that it has knowledge of the organization and endorses the cooperative effort?
- Is your project to build low-cost shelters? If yes, is a Low-Cost Shelter Agreement attached together with the other required documentation?
- Does the project involve a revolving loan? If so, is appropriate documentation included?
- If your grant request is for US\$25,001 or more, is a community needs assessment attached?
- Has the district grants subcommittee chair certified your application as complete (see section 11 of the application)?
- Have you made copies of all documents for your files prior to submitting them to TRF?

**Note:** You will receive a file number when the application is received at RI Headquarters. This does not indicate that the grant has been approved. You will receive an announcement packet if the Trustees approve your completed application. **The project cannot be started until the Matching Grant application has been approved by The Rotary Foundation Trustees.**

Send the completed application and all attachments to:

Matching Grants  
The Rotary Foundation  
One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
Telephone: (847) 866-3000  
Fax: (847) 328-8554  
E-mail: [grants@rotaryintl.org](mailto:grants@rotaryintl.org)





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The Rotary Foundation  
One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA**