



Humanitarian Grants and Educational Programs Budget Reductions Operational Impact May 2009

At their April 2009 meeting, the Trustees made difficult budget decisions in light of the current financial situation. An explanation of these decisions can be found on the [RI Web site](#). The information below explains the operational impact of these budget decisions.

Matching Grants

- The Matching Grant budget for the 2009-10 Rotary year is US\$9.5 million. This represents a 70% reduction from the original budget for 2008-09.
- Matching Grant applications will be accepted beginning 1 July 2009 in accordance with the normal business cycle.
- It is anticipated that the available Matching Grant budget will be committed very early in the Rotary year, so sponsors are encouraged to submit their applications *as early as possible* in the new Rotary year.
- Complete applications will be approved in date order based on the earliest date the application is complete and meets all processing requirements.
- Grant sponsors may substitute the amount requested from the World Fund with DDF. Sponsors also have the option of requesting no award from the World Fund if the cash and DDF contributions pledged in the application exceed US\$10,000.
- Matching Grant applications submitted before March 2009 that received an acknowledgement letter from TRF (with a grant application number) will not need to resubmit updated authorizations from 2009-10 leaders. These applications will be processed as normal on 1 July 2009.
- Matching Grant applications that were submitted after the budget was fully committed in March 2009 (and returned to the sponsors) must be resubmitted with updated authorizations from 2009-10 leaders.
- During 2009-10, there will be just one round of Competitive Matching Grants (applications requesting more than US\$25,000 from TRF) at the October 2009 Trustee meeting. Ten percent of the total Matching Grant budget (US \$950,000) was set aside to support these requests. Applications must be received by 1 August 2009 to receive consideration by the Trustees.
- Information about the status of the Matching Grant budget will be posted regularly at www.rotary.org beginning in July 2009.

Health, Hunger and Humanity (3-H) Grants

- During 2009-10, the Foundation will only approve 3-H grant applications that support water and sanitation projects in Ghana, the Philippines and the Dominican Republic as part of the RI/USAID International H₂O Alliance. No other 3-H applications will be supported. Sponsors of non-Alliance projects are encouraged to apply for competitive Matching Grants to fund all or portions of their projects.
- For more information about how to participate in or donate to these projects please contact Amanda Robertson at Amanda.Robertson@rotary.org or visit www.rotary.org.

Volunteer Service Grants

- Volunteer Service Grants will be phased out beginning 1 July 2009.
- The Foundation will no longer accept applications for travel to plan a future project or provide direct service in a community.
- Rotarians are encouraged to seek funding from outside sources for their international travel expenses.

District Simplified Grants

- There is no change to District Simplified Grants. Districts will still be able to request up to 20% of their available DDF to support local and international humanitarian projects according to the current program requirements.

Disaster Recovery Accounts

- All TRF funding for previously funded Disaster Recovery activities has been fully committed. In the interim clubs and districts that wish to respond to a disaster are encouraged to utilize the Disaster Recovery options provided by RI Programs.
- For more information visit <http://www.rotary.org/en/serviceandfellowship/DisasterRelief/howtohelp/Pages/ridefault.aspx>

Group Study Exchange

- Currently, GSE teams that use World Fund as their funding are allowed to partner with other districts using World Fund in order to travel in the same program year. The Trustees have now decided that beginning with the 2010-11 program award year, partnerships where both districts use World Fund will no longer allow for both teams to travel in the same program year.
- One district will send their team in the 2010-11 program award year and their partner will send their team in the 2011-12 program year.
- The awarding of 2010-11 World Fund GSE teams will be *conditional* until such time that the Trustees approve the 2010-11 program budget at their April 2010 meeting.
- Districts interested in participating in the GSE program for 2010-11 will need to determine whether they want to partner with other World Funded districts and travel within a two-year cycle or allocate District Designated Funds for a one-year GSE cycle.

Cultural Ambassadorial Scholarships, Multi-Year Ambassadorial Scholarships and Rotary Grants for University Teachers

- In April 2008, the Trustees agreed to offer Cultural and Multi-Year Ambassadorial Scholarships and Rotary Grants for University Teachers for the last time with the 2010-11 program year awards. This decision was intended to phase out under-utilized Educational Programs in comparison to the Academic-Year Ambassadorial Scholarships. In order to better achieve such program objectives and streamline operations, the Trustees, moved up the phase out plan by one year.
- This decision will not impact Cultural and Multi-Year Ambassadorial Scholars and Rotary Grants for University Teachers already awarded by The Rotary Foundation for the 2009-10 program year. It will, however, impact current recruitment for these same programs for the 2010-11 program year in the following ways:

- Cultural and Multi-Year Ambassadorial Scholarship applications in process for the 2010-11 program year may either be
 - (a) submitted to The Rotary Foundation by the sponsor district as an Academic-Year Ambassadorial Scholarship application (provided the district has US\$25,000 in DDF available to award the scholarship for 2010-11 and the candidate is prepared to study abroad for one academic year, or approximately nine months), or;
 - (b) returned to the scholarship candidate by the sponsor district with an explanation as to why the district could not endorse the application.
- Rotary Grant for University Teacher applications in process for the 2010-11 program year may not be endorsed by the sponsor district and the application should be returned to the applicant.

Scholarships Fund Pool for Low-Income Countries

- The Trustees agreed to suspend offering awards through the Scholarships Fund Pool for Low-Income Countries for both the 2010-11 and 2011-12 program years as a means to preserve World Fund availability to support other Foundation programs and reduce operations costs.
- The Trustees agreed to reassess this suspension for the 2012-2013 program year at their April 2010 meeting.
- The Trustees also agreed to encourage districts to continue to consider donating District Designated Funds directly to low-income country districts so that scholars from developing countries have the opportunity to receive Ambassadorial Scholarships.

Regional Scholar Seminar Grants

- The Trustees agreed not to offer the annual stipend through the World Fund to provide Regional Orientation Grants, for a programs budget savings of US\$200,000 in 2009-10.
- Regional Scholar Orientation Seminar organizers have been informed of this decision via email. It will be up to these multi-district orientation seminar leaders to determine, by consulting with their orientation planning committees, whether they can continue to offer such orientations in the 2009-2010 Rotary year.
- Please keep in mind that all Ambassadorial Scholars are required by the Trustees to attend an outbound orientation, but that such an orientation may be held at the club, district, multi-district or regional level. It is also important to recall that Ambassadorial Scholars may use part of their flat grants to fund their transportation to and from orientation seminars as well as any necessary lodging and meal expenses.

Questions regarding the operational impact of the Humanitarian Grants or Educational Programs budget reductions may be addressed to the Contact Center (contact.center@rotary.org or 866-9ROTARY). For specific Humanitarian Grants questions, please contact [Humanitarian Grants staff](#).