



ROTARY INTERNATIONAL THE ROTARY FOUNDATION DISTRICT 5000, HAWAII

DISTRICT 5000 SHARE - DDF ALLOCATION POLICY

The Policy for allocation and distribution of unused District Designated Funds (DDF) is made by the Rotary District Foundation Committee (DRFC) in accordance with TRF guidelines. The committee will invite the current DG, DGE and DGN to participate in the DDF Allocation meeting for suggestions and comments. Here are the current criteria for establishing the DDF allocations.

1. The committee will meet at the beginning of the Rotary year to review the available DDF after the SHARE DDF Detailed Report is provided in May.
2. The anticipated DDF award will be projected for the next two years (based on Annual Program Fund contributions) to determine the approximate DDF available over the three-year period (current plus next two years).
3. Review all DDF award options available and make a determination on what programs to contribute to in the current year as well as *projecting* program contributions for the next two years.
4. After calculating the balance of DDF available (for three-year period), divide the balance by 3 to determine the current total DDF available for Matching Grants.
5. The total DDF for the current year will be allocated to the clubs based on their percentage of APF contributions three-years earlier.
6. There will be 2 phases for the distribution of DDF for Matching Grants as outlined below.
7. D5000 Rotary clubs may partner with one or more D5000 clubs to *pool* their DDF allocation within a given year. *Partnering* means to be an active player in the grant by providing matching funds, administrative support, promotional support and manpower as needed to successfully implement the grant. Clubs will not be allowed to “assign or loan” their DDF allocation to another club.
8. All Terms & Conditions of The Rotary Foundation will be honored and abided by as a condition of D5000 providing DDF funds.
9. All dates relate to a Rotary year starting on July 1st of one year and ending on June 30th of the following year.
10. Each club will be advised of their current DDF allocation for matching grants via a letter or email to the Club Foundation Committee Chair and the Club President shortly after the conclusion of the DDF Allocation meeting.
11. Each club will be encouraged to participate in the Matching Grant program.

PHASE I

1. Phase I Matching Grants must comply with all TRF Matching Grant criteria including the TRF grant award be \$5,000.00 or more. (This will mean the total project cost must be at least \$11,000 or more).
2. Clubs applying for a Phase I Matching Grant will have to *match* the requested DDF 1:1. (Example: If a club is allocated \$4,000 in DDF allocation and wants to use the full allocation, it must contribute at least \$4,000 for the grant to be considered.)
3. Clubs applying for a Phase I Matching Grant and DDF allocation must provide a brief written description of the project and the beneficiary to the District Grants Area Coordinator by October 31st for preliminary screening. Preliminary approval or comments will be provided within two weeks of the submission.
4. Phase I MG applications must be submitted to the Area Grants Chair by November 15th.
5. Phase I MG awards will be made by November 30th.
6. If a club does not apply for their allocation (or part thereof), the club allocation will be forfeited and rolled into Phase II.

PHASE II

DDF funds remaining from the current year allocation after Phase I awards will be rolled into Phase II and made available on a *first come - first served basis*.

1. Clubs are asked to submit a *preliminary* request in writing by November 15th to the District Grants Area Coordinator. Preliminary approval or comments will be provided within two weeks of the submission.
2. Earliest date for Phase II application is Dec 1st, final date is Mar. 15th.
3. Clubs are limited to one project application in Phase II.
4. The minimum DDF award for Phase II is \$4,000.
5. The maximum DDF award for Phase II is \$10,000.
6. Limit of DDF available in Phase II is based on *rolled-over* funds from Phase I.
7. Clubs will be matched with on a 1:1 basis.
8. All applications received on October 1st will be put into a lottery and drawn at random.
9. Applications received after Oct. 1st will be date/time stamped and reviewed in order of receipt.
10. DDF Funds not used during Phase I or II will be rolled forward to the next year.

Revised: 9/10/09