



# TERMS AND CONDITIONS FOR ROTARY FOUNDATION CORPORATE SOCIAL RESPONSIBILITY (CSR) GRANTS

CSR Grants is a standalone program of The Rotary Foundation (the “Foundation”) and its associate foundations intended to help for-profit corporations achieve their social responsibility goals. Projects funded through CSR Grants will be implemented by host clubs or districts, with funds contributed by corporations. The corporate contribution must be paid to the Foundation or the local associate foundation to fund the grant.

Currently, CSR Grants is available only to for-profit corporations incorporated in Australia or Brazil. A similar program is available in India, subject to separate Terms and Conditions.

The Foundation may modify the terms and conditions of CSR Grants at any time to clarify them or to reflect policy changes.

## 1. ELIGIBLE ACTIVITIES

Activities that are eligible for CSR Grants funding:

- A. Align with the Foundation’s mission
- B. Are encouraged to align with one or more of Rotary’s areas of focus
- C. Can include:
  1. Local or international service projects and related travel
  2. Scholarships for any educational level
  3. Vocational training teams (groups of professionals who teach others about a particular field or learn more about their own) and related travel
  4. Projects and activities in countries where Rotary has clubs as well as in areas where we do not, and in geographic areas where permitted by law and in accordance with Foundation policies
  5. Rotary Youth Exchange, RYLA, Rotary Friendship Exchange, Interact, and New Generations Service Exchange programs
  6. Community assessments
  7. Construction and renovation
  8. Microcredit activities when working with a registered microfinance institution that has operated for at least three years to administer loan programs

9. Campaigns to build awareness of and signs alerting people to the presence of land mines
- D. Involve active participation from Rotary members
- E. Cause no harm and comply with the laws of both the United States and the country where the grant will be carried out. (If you plan to sponsor projects in or travel to countries sanctioned by the [U.S. Treasury Department's Office of Foreign Assets Control](#), you will be asked to supply more information.)
- F. Protect the safety and well-being of all minors who participate, and follow Rotary International's [youth protection policies](#)
- G. Are reviewed and approved by the Foundation before they are implemented
- H. Demonstrate sensitivity to the traditions and culture of the area where a project will be carried out
- I. Comply with the Conflict of Interest Policy for Program Participants as outlined in section 30.040. of [The Rotary Foundation Code of Policies](#) and summarized in section 10, Conflict of Interest Policy for Grants
- J. Adhere to Rotary's policies for the use of the name "Rotary" and other Rotary logos, emblems, and graphics, as outlined in sections 34.040.6. and 34.040.11. of the [Rotary Code of Policies](#).
- K. Include [signage](#) on or near projects that identify the grant sponsors and The Rotary Foundation, as outlined in section 40.010.2. of [The Rotary Foundation Code of Policies](#) and in accordance with Rotary's brand guidelines, which can be found in the [Brand Center](#)
- L. Adhere to Rotary's Privacy Statement for Personal Data outlined in section 26.080. of the [Rotary Code of Policies](#).

## 2. INELIGIBLE ACTIVITIES AND SPENDING

CSR Grants-funded activities may not:

- A. Discriminate against any group
- B. Promote a particular political or religious viewpoint
- C. Perform purely religious functions
- D. Provide continuous or excessive support of any one person, entity, or community
- E. Establish a foundation, permanent trust, or long-term interest-bearing account
- F. Create financial liability for the Foundation or Rotary International that is greater than the grant funding
- G. Include fundraising activities
- H. Transport vaccines over national borders without prior approval of appropriate government and regulatory authorities in the originating and receiving countries

- I. Require anyone to work without pay. (Projects should strive to uphold labor rights and fair wage practices; if the people who will benefit are required to volunteer on the project, their explicit consent is required.)
- J. Require work by anyone below the country's legal working age or, if the law doesn't specify, anyone under age 16

CSR Grants funds also may not be used to pay for:

- K. Expenses that are incurred, or activities that are in progress or already completed, before the grant is approved
- L. Contributions to the Foundation, its associate foundations, PolioPlus, or another Foundation grant
- M. Purchases of land or buildings
- N. Weapons or ammunition
- O. Military assistance
- P. Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, entertainment events, or project ceremonies
- Q. Public relations initiatives, unless they are essential to completing the project
- R. Project signage that costs more than US\$1,000
- S. The operating, administrative, or indirect program expenses of another organization
- T. Unrestricted cash donations to a person or cooperating organization
- U. COVID-19 vaccines
- V. Immunizations that administer only the polio vaccine
- W. Travel to National Immunization Days
- X. Abortions or procedures that are undertaken solely for sex determination
- Y. Study at a university that hosts a Rotary Peace Center in the same or similar academic program as Rotary Peace Fellows
- Z. International travel for anyone under age 18, unless they are accompanied by a parent or guardian or are participating in the Rotary Youth Exchange program
- AA. Loan guarantee systems
- BB. Items that would then be owned by a Rotary district, Rotary club, Rotaract club, or member
- CC. The detection and removal of land mines or the purchase of equipment to remove land mines

### 3. APPLICATION REQUIREMENTS

- A. Apply via email at the email address below. Applications are accepted throughout the Rotary year and are approved throughout the year based on the availability of funds.
- B. Grant sponsors need to each establish a grant committee of three Rotary members. The members of this committee need to come from the primary sponsor club (if the grant is club-sponsored) or district (if the grant is district-sponsored). Rotary International fiscal agents, national treasurers, and board members and paid staff of a cooperating or beneficiary organization associated with the grant may not serve on the committee.
- C. [Qualify](#) the primary sponsor districts involved in the grant activity.
- D. For club-sponsored grant applications, district Rotary Foundation chairs need to confirm that the primary sponsor clubs are qualified.
- E. All parties involved in the grant need to be in good standing with Rotary International and The Rotary Foundation.
- F. Ensure that all project names comply with Rotary's policies for the use of its logos, emblems, and graphics (see section 1, Eligible Activities).
- G. Limit each primary sponsor club or district to 5 open CSR grants at a time.
- H. Plan for contingencies. Sponsors may include a budget line item for contingencies that represents no more than 10% of the total budget, in order to offer protection from price increases or currency fluctuations.
- I. Include administrative costs. Sponsors may allocate up to 10% of the project budget for project management costs, which may include a project manager and project-specific overhead and administrative costs for cooperating organizations.
- J. If a grant application is not submitted within 12 months after it is started, it will be canceled.
- K. If a grant application isn't completed and approved within six months after it is submitted, it will be canceled.
- L. CSR grant applications have the following assessments:
  - a. Requests for total funding up to US\$100,000 are reviewed by the general secretary.
  - b. Requests for total funding of US\$100,001- US\$400,000 are reviewed by the general secretary, and the project will have an interim site visit from The Rotary Foundation Cadre of Technical Advisers.
  - c. Requests for total funding of US\$400,001 or more are reviewed by the general secretary and the Trustees, and the project will have an advance site visit and an audit or interim site visit by the Cadre.

#### 4. COOPERATING ORGANIZATIONS

- A. Cooperating organizations are reputable, non-Rotary organizations or academic institutions that provide expertise, infrastructure, advocacy, training, education, or other support for the project. Universities that host scholars are not considered cooperating organizations.
- B. Cooperating organizations need to comply with all of the Foundation's reporting and auditing requirements and provide receipts and required proof of purchases.
- C. Sponsors need to provide a [memorandum of understanding](#) (MOU) that is signed by both primary sponsors and the cooperating organization with the grant application. It should include:
  - 1. Verification by the primary sponsor that the grant is initiated, controlled, and managed by Rotary members
  - 2. An endorsement by the primary sponsor that affirms that the cooperating organization is reputable and responsible and follows all applicable laws
  - 3. A grant implementation plan that clearly lists the responsibilities of each party
  - 4. An agreement by the cooperating organization to participate in any financial review by the Foundation of activities connected with the grant

#### 5. TRAVEL POLICIES

- A. Anyone whose travel is paid for by grant funds should make their own travel arrangements. [Rotary International Travel Service \(RITS\)](#) can help.
- B. CSR grants can pay for the following budgeted expenses related to travel:
  - 1. Economy-class airplane tickets
  - 2. Transportation to and from airports and local travel related to implementing the grant
  - 3. The cost of inoculations or immunizations, visas, and entry and exit taxes
  - 4. Normal and reasonable luggage charges
  - 5. Travel insurance
- C. CSR grants do not pay for:
  - 1. Expenses associated with optional stopovers before or after travel that has been approved
  - 2. Penalties that result from changes in personal travel arrangements, including optional stopovers
  - 3. Charges for excess baggage or shipping travelers' baggage or other personal belongings
- D. The grant sponsors should keep up-to-date emergency contact information and travel itineraries for anyone who travels using grant funds. Be ready to share this information with the Foundation when asked to do so.
- E. Travelers are responsible for:
  - 1. Making travel arrangements promptly to avoid increasing the cost of travel
  - 2. Any expenses that exceed the approved travel budget
  - 3. Meeting medical requirements for international travel
  - 4. Abiding by Rotary International travel restrictions for particular countries (see item G below)
  - 5. Obtaining travel insurance
  - 6. Arranging and paying for any personal travel

- F. Each health care professional who provides services as part of the grant-funded activities is expected to have at least US\$500,000 in professional liability insurance coverage, known as errors and omissions liability. The participant obtains and pays for this coverage.
- G. Rotary International works with a global security advisory firm to maintain a [travel ban list](#). Because of safety concerns, the Foundation does not fund travel to these countries. If a country is added to the list while grant-funded travelers are in it, arrangements will be made for their immediate evacuation. Refusal to comply with these travel restrictions or evacuation requests will result in the Foundation canceling the grant and requiring the return of any funds that have already been disbursed. The Foundation cannot fund any grant project whose success relies on international travel to a country on the list, even if the cost of travel is not part of the project budget.

## 6. HOW GRANTS ARE FUNDED

- A. The Foundation funds CSR grants primarily from CSR contributions made by for-profit corporations.
- B. Rotary members and nonmembers can contribute cash toward a CSR project, but it will not be matched by the Foundation. Those contributions should be sent directly to the project's bank account. Those contributions do not generate Paul Harris Fellow recognition points, and the Foundation will not issue tax receipts for them.
- C. Cash contributions cannot come from a cooperating organization, a project supplier or vendor, or someone who benefits from the grant.
- D. Funds should never be collected from the people who will benefit from the project.
- E. Paul Harris Fellow recognition credit will not be given for contributions sent directly to the project.
- F. All CSR contributions are considered irrevocable contributions to The Rotary Foundation and will not be refunded.
- G. The Foundation will not provide matching funds from the World Fund.
- H. The minimum CSR contribution from corporations is US\$21,000, which includes 5% to offset the Foundation's processing and administrative expenses.
- I. Corporations receive major donor recognition, but do not receive Foundation recognition points.
- J. CSR contributions may be made by the corporation after e-approval of the CSR Grants application.
- K. CSR amount levels to charge administrative cost varying from a minimum of 3% to a maximum of 5% will be as follows:
  - 1. 5% additional contribution of CSR gifts of US\$21,000 – US\$74,999
  - 2. 4% additional contribution of CSR gifts of US\$75,000 – US\$ 149,999
  - 3. 3% additional contribution of CSR gifts of US\$150,000 or more
- L. Districts may allocate portions of their district grant to augment specific CSR grants while applying for district grants.

- M. While applying for a new district grant, a lump sum amount may be allocated as a line item for CSR-funded projects. After approval of the district grant, this amount may be directly transferred to the grant account of the district or club.
- N. While reporting for a closure of a district grant, the district may specify the amount allocated to each CSR project. Districts must note the specific project on their district grant report.

## **7. PAYMENTS**

- A. Grant funds won't be released until the grant sponsors have submitted their bank account information, and any payment contingencies have been met.
- B. Grant funds for a district-sponsored project will be paid only to a district or district foundation bank account. Grant funds for a club-sponsored project will be paid only to a club or club foundation bank account.
- C. Project funds may not be paid to a vendor, cooperating organization, or beneficiary organization before project expenses have been incurred or services have been delivered.
- D. Organizations being reimbursed for project expenses need to give the Rotary project sponsors copies of the original invoice or receipt before they'll be paid.
- E. The people who have signing authority for the bank account need to be members of the sponsor clubs or districts.
- F. The corporate CSR contribution portion (minus administrative expenses) will be paid at the same exchange rate at which the CSR contribution was received from the corporation.
- G. Grants for which the total funding is US\$400,001 or more will be paid in installments according to a spending plan.
- H. If payment requirements aren't met within six months of approval, the grant will be canceled (see section 9, Canceled Grants).

## **8. REPORTING REQUIREMENTS**

- A. Grant sponsors report to the Foundation on how grant funds are used. In addition to the reporting requirements in this section 8, sponsors in particular countries may have additional reporting requirements.
- B. Reports are submitted via email at the email address below. Only complete forms will be accepted.
- C. The Foundation won't approve new grant applications from any grant sponsor that has an overdue report for any Foundation grant.
- D. The Foundation may, at any time, review grants, conduct audits, send monitors, require additional documentation, or suspend any or all payments.
- E. Districts are required to report on the use of grant funds to their member clubs according to the terms of their qualification.

- F. Grant sponsors are required to keep copies of all receipts and bank statements related to the spending of grant funds, according to the terms of their qualification and applicable laws.
- G. Grant sponsors that don't adhere to Foundation policies and guidelines in implementing and financing grant projects will be required to return all grant funds and may be barred from receiving other grants for up to five years.
- H. The first progress report needs to be submitted within 12 months of receiving the first grant payment. After that, progress reports are due within 12 months of the acceptance date of the previous report. If requested by the corporate donor, progress reports may need to be submitted more frequently.
- I. Final reports need to be submitted within two months of completing the project.
- J. All activities funded by CSR grants need to be completed within 24 months after the Foundation transfers funds to the sponsors.
- K. If more than US\$1,000 of grant funds remain after all grant activities are completed, the Foundation needs to approve their use for additional eligible activities. If you cannot spend these funds as approved, you need to return them to the Foundation.
- L. If US\$1,000 or less of grant funds remain after all grant activities are completed, they may be used for activities that meet the CSR grant eligibility requirements without preapproval from the Foundation. Remaining grant funds in any amount may not be spent on expenses that are not related to the CSR grant.
- M. Once the reporting requirements are complete, the Foundation will report back to the corporate donor based on the reports received from the sponsors.
- N. Acceptable reports include the following details about the project:
  1. A description of how the project advanced the mission of the Foundation or goals of the selected areas of focus
  2. An account of how the project achieved the specific objectives outlined in the grant application, including any measures you set and the data you collected
  3. An explanation of how the project's results may be sustained over time
  4. A description of how the sponsors, as well as any cooperating organizations associated with the grant, participated in the project
  5. A detailed account of project spending and complete project account bank statements. The Foundation may also ask sponsors to submit receipts.

## **9. CANCELED GRANTS**

- A. If a grant has been fully paid but all funds are returned, corporate CSR donations will be spent consistent with the CSR Memorandum of Understanding.
- B. Any interest earned (up to US\$1,000) on grant funds must be spent on eligible expenses related to the project. Any interest earned (greater than US\$1,000) on grant funds must be sent to the Foundation.

## **10. CONFLICT OF INTEREST POLICY FOR GRANTS**

- A. Ensuring integrity in Rotary Foundation grants requires that everyone involved avoid actual and perceived conflicts of interest.



- B. A conflict of interest occurs when someone is in a position to make or influence a decision about a grant that could benefit them, their family, their business, or an entity in which they serve in a paid or voluntary leadership or advisory position.
- C. All actual or perceived conflicts of interest need to be disclosed to Rotary grants staff during the application process. If you're not sure whether a situation presents a conflict of interest, you should disclose it.
- D. No Rotary members can serve on a grant committee for any CSR grant for which they have a conflict of interest. A director, officer, or employee of the corporation that made the CSR contribution may not serve on the grant committee.
- E. CSR grants cannot be financed with contributions (e.g., corporate social responsibility funds) from donors (people or organizations) that have conflicts of interest regarding the grant.
- F. The Rotary grants staff or the Trustees will determine whether a conflict of interest exists in a particular case. If they conclude that there is or has been a conflict of interest in a grant, the grants staff will recommend to the Trustees an appropriate remedy to protect the integrity of the grant process. Remedies may include removing a member from a grant committee, declining a grant application, canceling an approved grant, or suspending a particular member, club, district, or cooperating organization from participating in Rotary grants.
- G. Some people are not eligible for grants or to benefit from any Foundation grants. They include:
  - 1. Current Rotarians
  - 2. Employees of clubs, districts, other Rotary entities (as defined in section 1.040. of the [Rotary Code of Policies](#)), or Rotary International
  - 3. The spouses; children or grandchildren by blood, legal adoption, or marriage without adoption; the spouses of those children or grandchildren, or parents or grandparents by blood of people listed above; and employees of agencies, organizations, or institutions that partner with Rotary International or the Foundation
  - 4. Former Rotarians and people with the familial relationships to former Rotarians described above, for three years after their or their relative's membership ends
- H. Rotary members who serve on a club or district selection committee that is responsible for a grant-funded activity need to be completely transparent about their personal, family, or business relationships with any person or organization that would be affected by a potential Rotary grant. This includes, but is not limited to, any relationship with scholarship candidates, cooperating organizations, vendors, or other people or organizations that would benefit from the grant. Committee members need to notify the committee chair of any actual or perceived conflict of interest before the selection process begins, and the actual or potential conflict also needs to be disclosed in the grant application.
- I. Before a Rotary district, club, or member conducts business related to a grant-funded activity that involves a vendor being paid by a Rotary entity, a fair, transparent, and thorough request for proposals or a bidding process needs to be conducted to ensure that the best services are secured at a reasonable cost. Possible conflicts of interest may arise when a Rotary entity is considering business in which funds will be paid to a member, a provider of goods or services that is owned or managed by a member, an honorary member, the people listed above who are ineligible for Foundation grants, or the corporation that made the CSR contribution.

- J. All grant transactions need to be reviewed to confirm that there is no conflict of interest with vendors or payment recipients, including, among others, partner nongovernmental organizations, providers of goods or services, insurance companies, shipping companies, and educational institutions. Vendors with conflicts of interest may be used if the vendor provides the best product or service at fair market cost, as evidenced by a sales quote or an offer obtained through a fair, transparent, and thorough bidding process.
- K. For more information on Rotary's Conflict of Interest Policy, please see section 30.040. of [The Rotary Foundation Code of Policies](#).

## **11. SPECIAL CONSIDERATIONS FOR AUSTRALIA**

- A. CSR grants applications, grants reports, and all inquiries should be submitted to [risppo@rotary.org](mailto:risppo@rotary.org).
- B. Grant funding may be used only for projects in [developing countries as prescribed by the Australian Department of Foreign Affairs & Trade](#) or for projects to support beneficiaries in Australia that are in great and urgent need as required of a public benevolent institution.

## **12. SPECIAL CONSIDERATIONS FOR BRAZIL**

- A. CSR grants applications, grants reports, and all inquiries should be submitted to [Email address TBA].
- B. For grants paid to sponsors in Brazil, receipts for all expenses must be submitted with reports.
- C. Any unused grant funds, including earned interest, of more than 100 Brazilian Reals must be returned to the Foundation.
- D. In addition to the grant reporting requirements above, sponsors must submit a donation certificate with the final report.