

未來願景計劃

扶輪基金會地區獎助金與全球獎助金的約定與條件



PDG Ortho 翻譯

扶輪基金會保留在任何時間更新與修改本約定與條件的權利。對於本約定與條件的更新可以在 RI 網站 www.rotary.org 找到，或是經由 futurevision@rotary.org 聯絡未來願景試辦計劃的幕僚取得。在本文件所提的全球獎助金的約定與條件僅適用於由扶輪社與地區所設計的全局獎助金。至於包裹式全球獎助金的約定與條件，請上 www.rotary.org 查詢。

- I. 一般性標準
- II. 贊助者標準
- III. 合格性標準
- IV. 限制
- V. 時間表與申請
- VI. 資金來源與捐獻
- VII. 撥付
- VIII. 報告的要求與憑證
- IX. 旅行
- X. 非扶輪社友的獎助金接受者
- XI. 合作機構
- XII. 扶輪基金會的特殊考量 (印度)
- XIII. 微型信貸與循環貸款

I. 一般性標準

扶輪基金會地區獎助金與扶輪基金會全球獎助金支援當地社區與國外各式各樣的人道性與教育性活動。所有接受這兩大類獎助金資助的專案與活動必須：

1. 與 [扶輪基金會的使命](#) 有相關
2. 納入扶輪社友的積極參與
3. 除了獎助金的金額之外，排除對於扶輪基金會或國際扶輪的任何責任
4. 恪遵美國以及活動進行所在地國家之管轄法律，並且不危害到個人或實體。
5. 只資助那些在執行以前已經被審查且核准的活動。獎助金不會被核准來補償扶輪社或地區已經完成或進行中的專案。我們准許並鼓勵在核准以前就先為獎助金活動做規劃，但是在核准以前不可以有支出發生。
6. 如果獎助金活動要在獎助金接受者的國家/地理區域以外進行，要展現出對另一個國家/地理區域的傳統與文化的敏感度。
7. 遵守 [扶輪基金會政策彙編 7.030](#) 節所列舉的 [獎助金參與者利益衝突政策](#)。

FUTURE VISION PLAN

Terms and Conditions for Rotary Foundation District Grants and Global Grants



The Rotary Foundation reserves the right to update and modify the terms and conditions of the grant at any time. Updates to the terms and conditions can be found on the RI Web site at www.rotary.org or requested by contacting Future Vision pilot staff at futurevision@rotary.org. The terms and conditions for global grants set forth in this document pertain to club- and district-developed global grants only. For terms and conditions for packaged global grants, go to www.rotary.org.

- I. [General Criteria](#)
- II. [Sponsor Criteria](#)
- III. [Eligibility Criteria](#)
- IV. [Restrictions](#)
- V. [Timelines and Applications](#)
- VI. [Financing and Contributions](#)
- VII. [Payments](#)
- VIII. [Reporting Requirements and Documentation](#)
- IX. [Travel](#)
- X. [Non-Rotarian Grant Recipients](#)
- XI. [Cooperating Organizations](#)
- XII. [Special Considerations for Rotary Foundation \(India\)](#)
- XIII. [Microcredit and Revolving Loans](#)

I. General Criteria

Rotary Foundation District Grants and Rotary Foundation Global Grants support a wide variety of humanitarian and educational activities in local communities and abroad. All projects and activities funded by these grants must:

1. Relate to the [mission of The Rotary Foundation](#)
2. Include the active participation of Rotarians
3. Exclude any liability to The Rotary Foundation or Rotary International except for the funding amount of the grant
4. Adhere to the governing laws of the United States and the country where the activity is taking place and not harm individuals or entities
5. Only fund activities that have been reviewed and approved before their implementation. Grants will not be approved to reimburse clubs or districts for projects already completed or in progress. Planning for grant activities ahead of approval is allowed and encouraged, but expenses may not be incurred before approval.
6. Demonstrate sensitivity toward another country's/geographic area's tradition and culture if grant activities will take place outside of the grant recipient's country/geographic area
7. Comply with the Conflict of Interest Policy for Grant Participants as outlined in section 7.030 of [The Rotary Foundation Code of Policies](#)

8. 遵守[扶輪基金會政策彙編1.050.2節](#)所列舉的有關扶輪標誌恰當使用的政策。

地區獎助金

此外，地區獎助金

1. 支援與(基金會)使命相關的當地性與國際性的人道性與服務性專案、獎學金、以及職業訓練團隊。
2. 可以在扶輪與非扶輪國家與地理區域資助專案與活動，只要在那裡適用的管轄法律准許，並且符合基金會的政策。

全球獎助金

此外，全球獎助金

1. 相關於六大焦點領域中之一項或多項
2. 支援人道性專案
3. 提供獎學金資助1至4學年的研究生層級或是其相等程度的課程或是研究
4. 支援那些經由提升他們本身的職業技巧或是提供他人專業訓練來展現對能力的增進的職業訓練團隊
5. 提供永續性，可衡量的成果
6. 在扶輪的國家或地理區域進行
7. 協助來自不同國家/地理區域的扶輪社與地區發展堅強的扶輪網絡
8. 必須由獎助金專案將要進行的國家/地理區域的至少一個扶輪社或地區(主要地主贊助者)以及一個或多個該國家/地理區域以外的扶輪社或地區(主要國際贊助者)所贊助。

II. 贊助者標準

一個地區或扶輪社如果要由扶輪基金會接受獎助金，所有參與的地區都必須通過扶輪基金會認證，並且參與的扶輪社也必須由他們的地區認證。此外，各地區以及所有獎助金委員會成員必須在國際扶輪與扶輪基金會聲譽良好。被禁止在獎助金委員會任職的個人包括RI財務特派員、全國性財務主管、以及一個與獎助金有關的合作或受益機構中的職員或支薪的幕僚。在擔任為主要贊助者時，每個地區或扶輪社被限制同一時間最多有10件未結案的獎助金案。

地區獎助金

地區必須設立一個由三位扶輪社友組成的獎助金委員會，包括執行年度的地區總監、地區扶輪基金委員會主委、以及地區獎助金小組委員會主委。

全球獎助金

地主以及國際主要贊助者必須各自為每一件全球獎助金案設立一個由三位扶輪社友組成的獎助金委員會。若是扶輪社所贊助的獎助金，該獎助金委員會的所有成員必須來自主要贊助扶輪社；若是地區所贊助的，則來自主要贊助地區。扶輪社所贊助的獎助金申請書必須包含由地區扶輪基金主委確認這些扶輪社經過適當的認證。

III. 合格性標準

除了扶輪基金會地區與全球獎助金的一般性標準之外，兩大獎助金類型還有特定的活動可以被容許。地區與全球獎助金可以資助

1. 限定在社區廁所與衛生系統、支線道路、水壩、橋樑、貯藏設備、柵欄與安全系統、供水/灌溉系統、以及溫室等公共建設的建造

8. Comply with the policy regarding the proper use of Rotary Marks as outlined in section 1.050.2 of [The Rotary Foundation Code of Policies](#)

District Grants

Additionally, district grants

1. Support local and international humanitarian and service projects, scholarships, and vocational training teams relating to the mission
2. Can fund projects and activities in Rotary and non-Rotary countries and geographic areas where permitted by applicable governing laws and in accordance with Foundation policies

Global Grants

Additionally, global grants

1. Relate to one or more of the areas of focus
2. Support humanitarian projects
3. Provide scholarships that fund coursework or research at a graduate level or its equivalent for a term of one to four academic years
4. Support vocational training teams that demonstrate capacity building by enhancing their own vocational skills or providing professional training to others
5. Provide sustainable, measurable outcomes
6. Take place in Rotary countries and geographic areas
7. Help to develop stronger Rotary networks of clubs and districts from different countries/geographic areas
8. Must be sponsored by at least one Rotary club or district in the country/geographic area where the grant project will take place (primary host sponsor) and one or more outside of that country/geographic area (primary international sponsor)

II. Sponsor Criteria

For a district or club to receive a grant from The Rotary Foundation, all districts involved must be [qualified](#) by The Rotary Foundation, and the clubs involved must be qualified by their district. In addition, districts and all grant committee members must be in good standing with Rotary International and The Rotary Foundation. Individuals prohibited from serving on a grant committee include RI fiscal agents, national treasurers, and officers and paid staff of a cooperating or beneficiary organization associated with the grant. When acting as a primary sponsor, each district or club is limited to 10 open grants at a time.

District Grants

Districts must establish a grant committee of three Rotarians, including the district governor of the implementation year, the district Rotary Foundation committee chair, and the district grants subcommittee chair.

Global Grants

Host and international primary sponsors must each establish a grant committee of three Rotarians for a global grant. All members of the grant committee must come from the primary sponsor club, if club sponsored, or district, if district sponsored. Club-sponsored grant applications must include confirmation from the district Rotary Foundation committee chairs that the clubs are appropriately qualified.

III. Eligibility Criteria

In addition to the general criteria for Rotary Foundation District and Global Grants, specific allowable activities have been identified for both grant types. District and global grants can fund

1. Construction of infrastructure limited to toilet blocks and sanitation systems, access roads, dams, bridges, storage units, fences and security systems, water/irrigation systems, and greenhouses

2. 目前使用中或營運中，且有個人在其內生活、工作、或在其內待上一段時間的結構物的翻修、修補以及刷新，這可以包括提供新的服務或是水電設備的升級(例如，電氣、配管、以及暖氣)，修補屋頂、對現有學校或醫院、電梯的擴建、以及浴室的翻修
3. 購置以及分發使用於疾病預防與母親保健專案的避孕品
4. 受獎學生、職業訓練團隊、以及專案受益者的國際旅行
5. 受獎學生、職業訓練團隊、專案受益者、以及那些執行本專案所必須的專業人士(扶輪社友與非扶輪社友)的國內旅行
6. 與專案執行相關的直接開支、酬金、合約勞工費用、或謝禮
7. 合乎PolioPlus計畫以及世界衛生組織所描述的最佳作為的涉及疫苗與免疫接種的活動。

地區獎助金

此外，地區獎助金可以資助

1. 為了專案的規劃以及直接服務的國際旅行
2. 與有經驗的夥伴機構合作的地雷的清除(扶輪社友不能親身參與地雷的人力清除)
3. 獎助金執行所必須的行政管理支出，最高達獎助金授與金額的3%，包括：銀行費用、郵資、軟體、以及一次獨立的財務評估。

IV. 限制

獎助金不能用來不公平的歧視任何團體，宣揚某一特別的政治或宗教觀點，支援在教堂或是其他禮拜地點的純宗教儀式，支援涉及墮胎或是純粹為分辨性別而進行的活動，資助武器或彈藥的購買，支援下列的RI計畫：[扶輪青少年交換](#)、[RYLA](#)、[扶輪友誼交換](#)、[扶青團](#)、以及[扶少團](#)，或是作為對基金會或是另一個扶輪基金會獎助金的新的捐獻。

此外，獎助金不能資助

1. 持續的或是過度的支援任何一個受益者、實體、或是社區
2. 設立一個基金會、永久性信託戶、或是長期的孳息帳戶
3. 購置土地或建築物
4. 新建任何個人可以在其內生活、工作、或是從事任何可以獲利的活動的結構物，像是建築物(學校、住家/低價避難所、以及醫院)，貨櫃屋、以及活動房屋，或是個人可以在其中從事任何類型的活動，包括生產、處理，的結構物
5. 募款活動
6. 與扶輪大型場合有關的支出，像地區年會、國際年會、(地帶)扶輪研習會、週年慶、或是娛樂性活動
7. 與人道性或教育性活動無直接關係的公共關係行動
8. 另一個機構的運作、行政管理、或非直接的計畫開支
9. 對於一個受益者或是合作機構毫無限制的現金捐獻
10. 進行中或是已經完成的專案
11. 主要是由非扶輪機構執行的活動
12. 以人力運送疫苗超越國界
13. 以研究或資料收集為主的人道性專案
14. 旅行去參加全國免疫日(NIDs)
15. 18歲以下青少年的國際旅行，除非是由他們的父母陪伴。

2. Renovation, repair, and refurbishment of structures that are currently occupied or operational in which individuals live, work, or spend a significant amount of time, which may include the provision of new services or upgrade of utilities (i.e., electrical, plumbing, and heating), repair of roofs, additions to existing schools or hospitals, elevators, and renovation of bathrooms
3. Purchase and distribution of contraceptives for use in disease prevention and maternal health projects
4. International travel for scholars, vocational training teams, and project beneficiaries
5. Domestic travel for scholars, vocational training teams, project beneficiaries, and those professionals (Rotarian and non-Rotarian) needed to implement the project
6. Direct costs, fees, contracted labor costs, stipends, or honorariums related to project implementation
7. Activities involving vaccines and immunizations that are consistent with the best practices described by the World Health Organization

District Grants

Additionally, district grants can fund

1. International travel for project planning and direct service
2. The removal of land mines in cooperation with an experienced partner organization (Rotarians may not personally participate in the physical removal of land mines)
3. Administrative expenses, up to 3 percent of the grant award, necessary for grant implementation including: bank fees, postage, software, and an independent financial assessment

IV. Restrictions

Grants cannot be used to unfairly discriminate against any group, promote a particular political or religious viewpoint, support purely religious functions at churches and other places of worship, support activities that involve abortion or that are undertaken solely for sex determination, fund the purchase of arms or ammunition, support the following programs of RI: [Rotary Youth Exchange](#), [RYLA](#), [Rotary Friendship Exchange](#), [Rotaract](#), and [Interact](#), or as a new contribution to the Foundation or another Rotary Foundation grant.

In addition, grants cannot fund

1. Continuous or excessive support of any one beneficiary, entity, or community
2. Establishment of a foundation, permanent trust, or long-term interest-bearing account. Grant funds can be used to establish a microcredit or revolving loan fund if the sponsors comply with the revolving loan requirements found in section XIII.
3. Purchase of land or buildings
4. New construction of any structure in which individuals live, work, or engage in any gainful activity, such as buildings (schools, homes/low-cost shelters, and hospitals), containers, and mobile homes, or structures in which individuals carry out any type of activity including manufacturing or processing
5. Fundraising activities
6. Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities
7. Public relations initiatives not directly related to a humanitarian or educational activity
8. Operating, administrative, or indirect program expenses of another organization
9. Unrestricted cash donations to a beneficiary or cooperating organization
10. Projects already in progress or completed
11. Activities primarily implemented by a non-Rotary organization
12. Transportation of vaccines by hand over national borders
13. Humanitarian projects that consist primarily of research or data collection
14. Travel to National Immunization Days (NIDs)
15. International travel for youth under the age of 18, unless accompanied by their parents

V. 時間表與申請

地區獎助金

為期兩年的業務週期包括一個規劃年度，在其間地區可以先提出一份地區獎助金申請書，以及一個執行年度，在其間資金會被撥付出去並運用於各專案。我們強烈鼓勵各地區在規劃年度開始規劃地區獎助金專案並提出申請書，但是地區也可以在執行年度當中提出申請書。

獎助金委員會必須提出一份地區獎助資金的完整申請書，最好是在規劃年度當中，這包括：

1. 申請及監督獎助資金支出的授權簽署
2. 對於資金將要使用的年度的一份整體支出計劃
3. 同意遵守所有標準地區獎助金政策、規範、以及標準

地區在每一個扶輪年度只能申請一件地區獎助金，但是此獎助金可以支援多項專案。任何獎助金的追加金額的申請必須在這筆獎助金的任何部分已經被基金會撥付出去以前為之。在所請求的資金所屬的扶輪年度結束後，扶輪基金會不會處理或核准地區獎助金的申請。

全球獎助金

扶輪社與地區要利用一個包含提案與申請兩階段的流程來申請全球獎助金。提案必須先被扶輪基金會接受後才能提出獎助金申請書。提案是在整個扶輪年度隨時可以提出。所有獎助金的提案與後續的申請書向扶輪基金會提出時必須在執行以前有足夠的時間以供審查與核准，否則它們不會被接受。下列的時間表適用於全球獎助金：

1. 提案後6個月內必須提出申請書，否則該提案將會被撤回。
2. 申請書提出後6個月內必須要完備並且被核准，否則該申請將會被撤回。
3. 如果申請書包含國際旅行，它必須在出發至少90天以前提出。
4. 在核准後6個月內必需達成撥付的各項條件，否則該獎助金會被取消。
5. 獎助金在撥付後12個月內必須執行，否則該獎助金會被取消，而贊助者會被要求退還資金。

獎學金的申請必須：

1. 在申請獎助金時提供大學所發的研究生層級學程的入學許可證明，或是進行研究生層級研究的邀請函。規定要有財務支援的保證書的入學許可是可以被接受的。

職業訓練團隊的申請必須：

1. 支援由至少三位具有在該焦點領域至少兩年工作經驗的非扶輪社友成員以及一位具有一般程度扶輪知識、國際經驗、領導技巧、以及在該焦點領域有某些專門知識的扶輪社友領隊所組成的團隊。
2. 確認如果在單一獎助金下有一個以上的團隊，所有團隊必須共享同樣的兩個主要贊助者，並且彼此要在相隔一年內開始他們的旅行。

V. Timelines and Applications

District Grants

The two-year business cycle includes a planning year, during which the district can first submit a district grant application, and an implementation year, during which the funds can be paid out and applied to projects. Districts are strongly encouraged to begin planning district grant projects and to submit applications during the planning year, but districts may also submit applications during the implementation year.

The grant committee must submit a complete request for district grant funds, preferably during the planning year, which includes:

1. Signed authorization to request and oversee the expenditure of the grant funds
2. A general spending plan for the year in which the funds will be spent
3. Agreement to comply with all standard district grant policies, guidelines, and criteria

Districts may apply for only one district grant per Rotary year, but this grant may support multiple projects. Any requests for an increase in the grant amount must be made before any portion of the grant has been paid out by the Foundation. The Rotary Foundation will not process or approve district grant applications after the end of the Rotary year for which the funds were requested.

Global Grants

Clubs and districts will apply for global grants using a two-step process involving a proposal and application. A proposal must be accepted by The Rotary Foundation before a grant application can be submitted. Proposals may be submitted on a rolling basis throughout the Rotary year. All grant proposals and subsequent applications must be submitted to The Rotary Foundation with sufficient time for review and approval before implementation or they may not be accepted. The following timelines apply to global grants:

1. Proposals must be followed by an application within six months or the proposal will be withdrawn.
2. Applications must be completed and approved within six months of submission or the application will be withdrawn.
3. If the application includes international travel, it must be submitted at least 90 days prior to departure.
4. Payment requirements must be met within six months of approval or the grant will be canceled.
5. Grants must be implemented within 12 months of payment or the grant will be canceled and the sponsors will be required to return the funds.

Applications for scholarships must:

1. Provide proof of university admission to a graduate-level program or letter of invitation to conduct post-graduate-level research when applying for the grant. Admission that requires a guarantee of financial support is acceptable.

Applications for vocational training teams must:

1. Support teams composed of at least three non-Rotarian members with at least two years of work experience in the area of focus and a Rotarian team leader who has a general level of Rotary knowledge, international experience, leadership skills, and some expertise within the area of focus.
2. Confirm that if more than one team is traveling under a single grant, all teams must share the same two primary sponsors and commence their travel within one year of each other.

VI. 資金來源與捐獻

地區獎助金

地區獎助金是扶輪基金會完全以來自**地區指定基金(DDF)**的分配額所資助。一個地區每年可以申請單一件獎助金以支援一件或多件專案，最多使用達它的**分享制度分配額**的50%，而此分享制度分配額代表該地區年度捐獻的50%。

全球獎助金

全球獎助金是基金會由世界基金所資助，額度自US\$15,000 到 \$200,000。基金會對於扶輪社與地區的現金捐獻以50%配合，而對於DDF捐獻以100%配合。

人道性專案的國際贊助者被要求提供總贊助資金的顯著的一部分。而人道性專案的地主贊助者被鼓勵對本獎助金的資金籌募作捐獻。

在核准以後，獎助金的資金來源不能變更。保羅哈里斯之友表彰績點只會授予捐到扶輪基金會的贊助者捐獻，而不會授予直接捐到專案的捐獻。捐到扶輪基金會的贊助者捐獻如果多於獎助金申請書所明列的金額，超出的部份將歸到**年度計畫基金**而不會轉到該專案。

VII. 撥付

地區獎助金

獎助資金將只撥付給地區在**認證**過程當中所確認的地區銀行帳戶。地區獎助資金在執行的扶輪年度的7月1日開始可供撥付，但是在前一扶輪年度的地區獎助金結案以前不會被釋出。在執行年度結束後資金就不再供使用，如果贊助者在執行年度的5月15日以前無法達成撥付的各項要求，該獎助金將會被取消。

全球獎助金

除非所有贊助捐獻已經提交扶輪基金會，而且任何撥款的條件都已符合，獎助資金不會被釋出。獎助資金將被撥付給申請書中所提供的帳戶。如果某一獎助金專案在專案贊助者收到撥款後被取消，所有剩餘的獎助資金必須退還扶輪基金會。退還的資金將被記貸到世界基金。不過，如果退還的資金超過世界基金的授與金額，這些多出來的資金將根據原始的出資明細按比例退還給捐獻者。

VIII. 報告的規定與憑證

獎助金接受者負有向基金會報告獎助資金的使用的責任。進度與最終報告必須透過 www.rotary.org 的會員入口(Member Access)提交。這些表單必須以其完整形式撰寫，報告才會被基金會接受。如果獎助金的贊助者對於任何基金會獎助金有逾期報告時，新的獎助金申請將不會被基金會接受。基金會保留在任何時間審查獎助金，進行稽核，派遣一位監察員，要求提交額外的憑證，以及認為必要時終止任何或所有撥款的權利。

下列的報告標準也適用於獎助金接受者：

1. 未使用的獎助資金必須迅速退還扶輪基金會。

VI. Financing and Contributions

District Grants

District grants are funded by The Rotary Foundation solely with allocations from the [District Designated Fund](#) (DDF). A district may apply for a single grant per year to support one or more projects using up to 50 percent of its [SHARE allocation](#), which represents 50 percent of the district's annual giving.

Global Grants

Global grants are funded by the Foundation from the World Fund and range from US\$15,000 to \$200,000. The Foundation matches club and district cash allocations at 50 percent and DDF contributions at 100 percent.

International sponsors for humanitarian projects are required to provide a significant portion of the total sponsor funding. Host sponsors for humanitarian projects are encouraged to contribute toward the financing of the grant.

Grant financing cannot be changed after approval. Paul Harris Fellow recognition credit will only be given for sponsor contributions sent to The Rotary Foundation and will not be granted for contributions sent directly to the project. Sponsor contributions sent to The Rotary Foundation prior to Trustee approval of the global grant may not be available for a specific grant. Sponsor contributions sent to The Rotary Foundation above and beyond the amount specified in the grant application will be credited to the [Annual Programs Fund](#) and will not be forwarded to the project.

VII. Payments

District Grants

Grant funds will be paid only to the district bank account identified by the district during the [qualification](#) process. District grant funds are available for payment in the implementation Rotary year, beginning 1 July, but will not be released until the previous Rotary year's district grant is closed. Funds are not available after the close of the implementation year; if sponsors do not meet all payment requirements by 15 May of the implementation year, the grant will be canceled.

Global Grants

Grant funds will not be released until all sponsor contributions have been submitted to The Rotary Foundation and any payment contingencies have been met. Grant funds will be paid to the account provided in the application. If a grant project is cancelled after the project sponsors receive payment, all remaining grant funds must be returned to TRF. Returned funds will be credited to the World Fund. However, if returned funds exceed the World Fund award, the additional funds will be pro-rated back to contributors according to the original funding breakdown.

VIII. Reporting Requirements and Documentation

Grant recipients are responsible for reporting to the Foundation on the use of grant funds. Progress and final reports must be submitted via Member Access at www.rotary.org. These forms must be completed in their entirety for the report to be accepted. New grant applications will not be accepted by the Foundation if the grant sponsor has an overdue report for any Foundation grant. The Foundation reserves the right to review grants at any time, conduct an audit, send a monitor, require the submission of additional documentation, and suspend any or all payments if deemed necessary.

The following reporting criteria also apply to grant recipients:

1. Unused grant funds must be returned promptly to The Rotary Foundation.

2. 地區必須遵照認證的條款向他們的成員扶輪社報告獎助資金的使用。
3. 獎助金贊助者必須遵照認證的條款以及任何適用的當地與國際法律保存所有與獎助金所資助的開支相關的收據以及銀行對帳單的副本。
4. 在執行以及籌措專案資金時未能恪遵基金會政策與規範之獎助金贊助者必須以全額退還被不當使用的獎助資金，並可能會被禁止在最長5年的期間內接受未來的獎助金。

地區獎助金

這些額外的標準適用於地區獎助金：

1. 為資金的支出提出文件證明的最終報告必須在收到撥款後12個月內提交基金會，或是在獎助資金的完全支出後的2個月內。
2. 所有由地區獎助金所資助的獎助金專案與活動必須在由基金會或是當地地區撥付給扶輪社或專案所在地後24個月內完成。
3. 未使用的獎助資金必須迅速退還扶輪基金會，並會被記貸到該地區的DDF。

全球獎助金

這些額外的標準適用於全球獎助金：

1. 必須在收到第一筆獎助金撥款後12個月內提交進度報告，以後每12個月提交一次。
2. 最終報告必須在專案完成後2個月內提交。
3. 未使用的獎助資金必須退還扶輪基金會，並將記貸到世界基金。

IX. 旅行

獎助金接受者負責安排全部旅行，而且不能利用國際扶輪旅行服務處(RITS)。超出經核准的旅行預算的支出要由旅行者自行負責，除非經過基金會核准。未能及時安排好旅行有可能會增加旅行費用或是導致獎助金被取消。所有獎助金接受者必須符合國際旅行的醫療要求。接受者可以在獎助金活動結束後自行安排最多4週的個人出資旅行。

扶輪基金會獎助金涵蓋下列旅行有關的支出：

1. 經濟艙機票
2. 與執行獎助金相關的機場來回以及當地的旅行
3. 預防接種/免疫、簽證、以及入出境稅
4. 保險費用
5. 正常且合理的行李費用

扶輪基金會獎助金不涵蓋下列旅行有關的支出：

1. 在經過核准的旅程之前以及之後的非必要性的中途停留的相關費用
2. 由於改變個人旅行安排，包括非必要性的中途停留，所導致的懲罰性費用
3. 行李超重費用、貨運費、以及航班取消保險

獎助金接受者必須取得下列最低保險項目：

1. US\$250,000或等值的醫療照護與住院保險，涵蓋基本重大醫療支出，包括意外與疾病支出、住院、以及相關的補助
2. US\$50,000或等值的緊急疏散保險

2. Districts must report the use of grant funds to their member clubs in accordance with the terms of qualification.
3. Grant sponsors must maintain copies of all receipts and bank statements related to grant-funded expenditures in accordance with the terms of qualification and any applicable local and international laws.
4. Grant sponsors who fail to adhere to Foundation policies and guidelines in implementing and financing projects must return misused grant funds in their entirety and may be barred from receiving future grants for a period of up to five years.

District Grants

These additional criteria apply to district grants:

1. Final reports documenting the disbursement of funds must be submitted to the Foundation within 12 months after the payment is received, or within 2 months of the grant's total disbursement.
2. All grant projects and activities funded by district grants must be completed within 24 months of disbursement by the Foundation or the local district to the club or project site.
3. Unused grant funds must be returned promptly to The Rotary Foundation and will be credited to the district's DDF.

Global Grants

These additional criteria apply to global grants:

1. Progress reports must be submitted within 12 months of receiving the first grant payment and every 12 months thereafter.
2. Final reports must be submitted within two months of completing the project.
3. Unused grant funds must be returned to The Rotary Foundation and will be credited to the World Fund.

IX. Travel

Grant recipients are responsible for arranging all travel and cannot utilize Rotary International Travel Services (RITS). Expenses exceeding the approved travel budget will be the responsibility of the traveler unless approved by the Foundation. Failure to arrange travel on a timely basis may increase the cost of travel or result in the cancellation of the grant. All grant recipients must meet medical requirements for international travel. Recipients may make their own arrangements for personally funded travel at the end of the grant activities for a maximum of four weeks.

Rotary Foundation grants will cover the following expenses related to travel:

1. Economy-class ticket(s)
2. Transportation to and from airport and local travel related to grant implementation
3. Cost of inoculations/immunizations, visas, and entry and exit taxes
4. Insurance costs
5. Normal and reasonable luggage charges

Rotary Foundation grants will not cover the following expenses related to travel:

1. Expenses associated with optional stopovers before and after preapproved travel
2. Penalties resulting from changes in personal travel arrangements, including optional stopovers
3. Excess baggage charges, shipping charges, and flight cancellation insurance

Grant recipients must obtain the following *minimum* insurance coverage:

1. US\$250,000 or equivalent for medical care and hospitalization for basic major medical expenses, including accident and illness expense, hospitalization, and related benefits
2. US\$50,000 or equivalent for emergency evacuation

3. US\$25,000或等值的遺體遣返保險

保險的涵蓋範圍必須是全世界的，而非限於接待國家。對本國的涵蓋可以被排除。保險必須自出發之日起生效直到返家之日為止。獎助金接受者在受到基金會要求時必須提供一份他們的保單的副本。基金會不負責對於任何種類的獎助金接受者提供保險涵蓋。

所有獎助金接受者必須遵守RI的旅行國家限制。

贊助扶輪社或地區必須保存所有使用獎助資金旅行的獎助金接受者緊急聯絡資料以及旅遊行程，並且在受到要求時與基金會分享此資訊。

X. 非扶輪社友獎助金接受者

接受獎助金資助獎學金以及參與職業訓練團隊的非扶輪社友被期待表現出對扶輪良好的知識以及堅決的承諾與他們的贊助者參與活動與服務。下列標準也是用於非扶輪社友獎助金接受者：

1. 非扶輪社友獎助金接受者在出國以前必須參與一次出國前訓練課程。
2. 非扶輪社友獎助金接受者被期待應他們的贊助者要求參與扶輪社與地區的活動。
3. 職業訓練團隊成員的親人如果符合合格性要求時也可以參加同一團隊。
4. 獎學金學者與職業訓練團隊成員如果在獎助金結束後選擇繼續旅行，必須在獎助金完成後4週之內回到他們的國際贊助者地區。
5. 非扶輪社友獎助金接受者應熟練接待國語言。
6. 獎學金接受者必須居住在他們的接待地區。

XI. 合作機構

合作機構是受到贊助者邀請提供專業技術、基礎建設、倡議、訓練、教育、或是對於獎助金作其他支援的聲譽良好的非扶輪機構或是學術研究機構。合作機構必須同意遵守扶輪基金會所要求的報告以及稽核工作，並且應要求提供收據與採購證明。在一個扶輪年度內，對涉及單一個合作機構的專案不能核准超過5件全球獎助金，除了在某一特定大學研究的獎學生以外。

地區獎助金

所有提供給合作機構的資金必須使用於明確的專案活動，而地區也必須保存一份這類活動的分項列舉的報告。

全球獎助金

獎助金贊助者必須在申請時提供一份由主要贊助者雙方以及合作機構所簽署的備忘錄(MOU)。該MOU必須包含下列項目：

1. 由主要贊助者雙方證實此獎助金是由參與的扶輪社或地區所發起、控制、以及管理
2. 來自兩主要贊助者背書確認該合作機構聲譽良好且負責任，並且在所有管轄法律範圍內行事
3. 明確界定涉及各方面的活動的獎助金執行計劃

3. US\$20,000 or equivalent for repatriation of remains

Insurance coverage should be worldwide and not limited to the hosting country. Coverage in the home country may be excluded. Insurance must be valid from the date of departure through the date of return home. Grant recipients must provide a copy of their policy(s) upon request of the Foundation. The Foundation shall have no responsibility to provide insurance coverage of any kind for the grant recipients.

All grant recipients must abide by RI country travel restrictions.

The sponsoring club or district must maintain emergency contact information and travel itineraries for all grant recipients traveling on grant funds and share this information with the Foundation if requested.

X. Non-Rotarian Grant Recipients

Non-Rotarians receiving grant funding for scholarships and participation in vocational training teams are expected to demonstrate a good knowledge of Rotary and a solid commitment to participate in activities and service with their sponsors. The following criteria also apply to non-Rotarian grant recipients:

1. Non-Rotarian grant recipients are required to participate in an outbound orientation session before departure.
2. Non-Rotarian grant recipients are expected to participate in club and district activities as requested by their sponsors.
3. Relatives of a vocational training team member may participate on the same team if they meet eligibility requirements.
4. Scholars and vocational training team members who elect to travel after the grant must return to their international sponsor district within four weeks after the grant is completed.
5. Non-Rotarian grant recipients should be proficient in the language of the host country.
6. Scholarship recipients must reside in their host district.

XI. Cooperating Organizations

Cooperating organizations are reputable non-Rotary organizations or academic institutions solicited by the sponsors that provide expertise, infrastructure, advocacy, training, education, or other support for the grant. Cooperating organizations must agree to comply with all reporting and auditing activities required by The Rotary Foundation and provide receipts and proof of purchase as required. No more than five global grants may be approved in a Rotary year for projects involving a single cooperating organization, with the exception of scholars studying at a particular university.

District Grants

All funding provided to cooperating organizations must be used for specific project activities, and the district must maintain an itemized report of such activity.

Global Grants

Sponsors of grants must provide a memorandum of understanding (MOU) at the time of application signed by both primary sponsors and the cooperating organization. The MOU must include the following items:

1. Verification from both primary sponsors that the grant is initiated, controlled, and managed by the Rotary clubs or districts involved
2. Endorsement from the primary sponsors affirming that the cooperating organization is reputable and responsible and acts within all governing laws
3. Grant implementation plan clearly delineating the activities of each party involved

4. 來自合作機構的同意參與任何扶輪基金會對於與獎助金有關聯的活動的財務審查

XII. 扶輪基金會的特殊考量 (印度)

扶輪基金會與印度扶輪基金會鼓勵印度的所有扶輪社與地區根據國外捐獻管理法案(FCRA)向印度政府(GOI)註冊。有關FCRA的一般資訊，請上網<http://mha.nic.in/fcra.htm>；要取得註冊表單，請到<http://mha.nic.in/fcra/intro/forms.html>。

除了其他所有約定與條件之外，全額或部分撥付到印度的扶輪社或地區的獎助金須遵循下列撥付與報告的程序以遵守GOI的法律以及FCRA：

1. 獎助資金將不會被釋出到印度銀行的帳戶，除非第VII節所列的一般性撥付規定全部都已符合，並且或者是贊助者們提供文件證明該銀行帳戶已經根據FCRA註冊，或者是幕僚確定可以由印度國內的捐獻得到足夠的資金。否則，該項撥付將會放入排隊行列，並且只有當作了更多的捐獻而有足夠的資金可用時，才以先到先處理的方式撥付。獎助金贊助者必須確定資金不會相混雜。
 - a. 地區獎助金
撥款要取決於一份包含每一件列舉的專案或活動逐項列舉的預算的詳細支出計劃的核准與否。獎助資金只能撥付給地區在認證流程中所指定的銀行帳戶。這個地區銀行帳戶的命名必須能很容易辨認為此地區以及此專案。(一個恰當的命名例子為*扶輪0000地區地區獎助金12345Rotary District 0000 District Grant 12345*)。地區獎助資金在執行的扶輪年度7月1日開始可供撥款，但除非先前一個扶輪年度的地區獎助金已經結案，否則不會被釋出。在執行年度結束後資金就無法取得；如果贊助者在執行年度的5月15日以前無法達成撥款規定，這筆獎助金將會被取消。
 - b. 全球獎助金
除非所有贊助者的捐獻都已經提交給扶輪基金會，並且任何撥款的條件都已經達成，獎助資金不會被釋出。獎助資金會被撥付到獎助金贊助者所提供的帳戶。
2. 在每年3月31日以前釋出給印度的獎助金的進度報告在同年5月31日到期。最終報告在獎助金完成後2個月到期。獎助金贊助者必須確保由FCRA註冊的銀行帳戶所收到的資金不能與當地的資金相混雜。
3. 所有進度報告必須包含：
 - a. 第VIII節所列的所有一般性報告規定
 - b. 經由會員入口Member Access提交的進度報告必須有一份副本交給南亞辦公室。
 - c. 如果獎助金額的一部份已經被使用時，需要使用證明，連同該筆獎助金額的收支報表，由註冊會計師簽證(附上會員號碼)。
 - d. 如果獎助資金因為任何理由尚未使用，請附一份顯示獎助金額入帳的日期的原始銀行結單或是銀行存摺(或是一份由銀行經理/註冊會計師證明的影印本)，以及一份聲明說明為何該筆獎助金額尚未動用，雖然該獎助金額在3月以前就收到。
4. 所有最終報告必須包含：
 - a. 第VIII節所列的所有一般性報告規定
 - b. 經由會員入口提交的最終報告必須有一份副本交給南亞辦公室。

4. Agreement from the cooperating organization to participate in any financial review by the Foundation of activities connected with the grant

XII. Special Considerations for Rotary Foundation (India)

The Rotary Foundation and the Rotary Foundation (India) encourage all Rotary clubs and districts in India to become registered with the Government of India (GOI) under the Foreign Contribution Regulation Act (FCRA). For general information about the FCRA, go to <http://mha.nic.in/fcra.htm>; for registration forms, go to <http://mha.nic.in/fcra/intro/forms.html>.

In addition to all other terms and conditions, grants with full or partial payment to a Rotary club or district in India should follow these payment and reporting procedures to comply with the GOI laws and the FCRA:

1. Grant funds will not be released to a bank account in India unless all general payment conditions listed below have been met. Either the sponsors provide documentation showing that the bank account is registered under the FCRA or staff determine that sufficient funds are available from contributions made within India. Otherwise, the payment will be placed in a queue and paid on a first-come, first-served basis only when additional contributions are made and sufficient funds are available. The sponsors of grants must ensure funds are not co-mingled.
 - a. District Grants
Payment is contingent upon the approval of a detailed spending plan that includes an itemized budget for each listed project or activity. Grant funds will be paid only to the district bank account identified by the district during the [qualification](#) process. The nomenclature of the district bank account must be easily identifiable with the district and the project. (A proper naming example is *Rotary District 0000 District Grant 12345*). District grant funds are available for payment in the implementation Rotary year, beginning 1 July, but will not be released until the previous Rotary year's district grant is closed. Funds are not available after the close of the implementation year; if sponsors do not meet all payment requirements by 15 May of the implementation year, the grant will be canceled.
 - b. Global Grants
Grant funds will not be released until all sponsor contributions have been submitted to The Rotary Foundation and any payment contingencies have been met. Grant funds will be paid to the account provided by the grant sponsors.
2. Progress reports on grant funds released to India through 31 March of each year are due by 31 May of that same year. Final reports are due two months after the grant's completion. The grant sponsors must ensure that funds received in FCRA registered bank account should not be co-mingled with the local funds.
3. All progress reports must include:
 - a. All general reporting requirements as listed in Section VIII.
 - b. A copy of the progress report filed via member access must be submitted to the South Asia Office.
 - c. Utilization certificate if a portion of the grant amount has been used, along with statement of receipt and payment for the grant amount, certified by an independent chartered accountant (including membership number)
 - d. If the grant funds were not used for any reason, an original bank statement or bank passbook (or a photocopy certified by the bank manager/ chartered accountant) indicating the date on which the grant amount was credited and a statement explaining why the grant amount has not yet been used, even though the grant amount was received before March
4. All final reports must include:
 - a. All general reporting requirements as listed in Section VIII.
 - b. A copy of the final report filed via member access must be submitted to the South Asia Office.

- c. 使用證明，連同該筆獎助金額的收支報表，由有照會計師簽證(包括會員號碼)。
 - d. 一份原始銀行結單或是銀行存摺(或是一份由銀行經理/註冊會計師證明為真正副本的影印本)
 - e. 一份銀行調節報表，如果有多筆獎助金撥付到單一FCRA帳戶的話
 - f. 撥付帳單/費用憑證正本或影印本，以及(如果只提供影印本的話)一份手寫保證“所有正本將會保存8年，並且當印度扶輪基金會要求時會被出示”。
 - g. 受益者資訊(例如，相片、新聞簡報、來自受益者的感謝函)
 - h. 將任何金額的任何剩餘資金退還印度扶輪基金會。
5. 一個向FCRA註冊的扶輪社或地區必須負責及時提交FC-3申報連同財務報表給心得里的內政部。

XIII. 微型信貸與循環貸款

扶輪基金會對於微型信貸與循環貸款計畫以助長小型、經濟上自助的企業有一個承諾。由基金會所資助的微型信貸或循環貸款計畫必須納入一項可以持續超過貸款資金管理期限的成份，像是訓練。

下列額外的標準適用於微型信貸與循環貸款：

1. 希望使用全球獎助資金來資助一項微型信貸專案的扶輪社與地區必須隨獎助金申請書提交微型信貸的補充表單。
2. 鼓勵扶輪社與地區和信用良好並且已經公認的合作機構/微型貸款機構合夥執行貸款計畫以作為一種承諾永續發展專案的方式。贊助扶輪社或地區必須督導並且掌控此專案。
3. 由於微型信貸或循環貸款來自扶輪基金會的母金所產生的利息或費用可以用於直接支持本專案的行政管理支出。
4. 如果本專案在基金會的報告規定被達成以前就終止，獎助資金必須歸還給扶輪基金會。
5. 扶輪基金會不資助融資擔保系統。

- c. Utilization certificate along with statement of receipt and payment for grant amount, certified by an independent chartered accountant (including membership number)
 - d. An original bank statement or bank passbook (or a photocopy certified as true copy by the bank manager / chartered accountant)
 - e. A bank reconciliation statement, if multiple grants were paid to a single FCRA account
 - f. Originals or photocopies of bills of payment/expenses vouchers and, if only photocopies are provided, a written undertaking that “all originals will be kept for a period of eight years and will be produced as and when required by Rotary Foundation (India)”
 - g. Beneficiary information (for example, photographs, newspaper clippings, appreciation letter from beneficiary)
 - h. Return of any remaining funds of any amount to the Rotary Foundation (India)
5. A FCRA registered club or district shall be responsible for furnishing FC-3 return along with the financial statements to the Ministry of Home Affairs, New Delhi in a timely manner.

XIII. Microcredit and Revolving Loans

The Rotary Foundation has a commitment to microcredit and revolving loan programs to facilitate small, economic self-help enterprises. Microcredit or revolving loan programs funded by the Foundation must incorporate a component, such as training, that extends beyond the management of loan capital.

The following additional criteria apply to microcredit and revolving loan activities:

1. Clubs and districts that wish to use global grant funds to support a microcredit project must submit the microcredit supplement form with the grant application.
2. Clubs and districts are encouraged to partner with reputable and established cooperating organizations/microfinance institutions to administer loan programs as a way of undertaking sustainable development projects. The sponsoring club or district must supervise and control the project.
3. Interest and fees generated by microcredit or revolving loan fund capital from The Rotary Foundation may be used for administrative expenses that directly support the project.
4. If the project is terminated before the Foundation’s reporting requirements are met, grant funds must be returned to The Rotary Foundation.
5. The Rotary Foundation will not fund loan guaranty systems.