

# 配合獎助金指南

THE GUIDE TO MATCHING GRANTS



2008-09 年度第 4B 地帶年度計劃基金策略顧問  
陳仁德前總監 PDG Ortho 編譯

“我無法描述我們對你們在這裡所做的有多感激。我們的兒童長大後將會記得扶輪社員的善行。”

—巴布亞新幾內亞 ULAMONA 的社區領導人 STANIS BAI

對於一套由澳洲與日本扶輪社員在扶輪基金會的  
配合獎助金的資助下所裝置的淨水系統所表  
達的感激

## 常用術語詞彙

受益人 **BENEFICIARY**: 物品或服務的接受者

合作機構 **COOPERATING ORGANIZATION**: 一個直接參與專案的執行，提供專業技術以及專案協調的機構

**DDF**: 地區指定基金

**DGSC**: 地區獎助金小組主委

**DRFC**: 地區扶輪基金主委

地主夥伴 **HOST PARTNER**: 專案所在國家的扶輪社或地區

國際夥伴 **INTERNATIONAL PARTNER**: 專案所在國家之外的扶輪社或地區

主要聯絡人 **PRIMARY CONTACT**: 擔任扶輪基金會與專案夥伴間的主要聯絡點的(地主或國際)夥伴扶輪社或地區的社員

供應商 **SUPPLIER**: 提供使用獎助金的資金購置的物品或服務的單位

---

## 目錄

第 1 章	如何開辦一件配合獎助金	
	何謂配合獎助金？ .....	2
	配合獎助金的流程 .....	2
	配合獎助金作業週期 .....	3
	競爭性配合獎助金的申請 .....	3
	配合獎助金合格性規範與標準 .....	3
	配合獎助金合格性規範 .....	3
	扶輪社員的參與 .....	5
	夥伴的捐獻 .....	5
	報告 .....	5
	時間限制 .....	6
	合作機構 .....	6
	地區扶輪基金委員會主委的責任 .....	6
	地區獎助金小組委員會主委的責任 .....	6
	如何找到一個夥伴 .....	7
	管理工作 .....	8
第 2 章	如何撰寫配合獎助金申請書	
	專案描述 .....	10
	地主/國際夥伴 .....	11
	專案預算 .....	12
	專案籌款 .....	13
	專案規劃 .....	14
	競爭性獎助金 .....	15
	授權 .....	16
	合作機構 .....	17
	最終報告 .....	18
	地區獎助金小組委員會主委的證明 .....	19
	完成核對清單 .....	20
第 3 章	獎助金被核准後有哪些事呢？	
	配合獎助金通知信函 .....	22
	配合獎助金同意書 .....	23
	配合獎助金受款人資料表 .....	24
	配合獎助金夥伴的捐獻 .....	25
	對於以分期方式的獎助金付款的支出計畫 .....	26
	執行您的專案 .....	27

---

## 第 4 章 如何撰寫一份配合獎助金報告

專案資訊 .....	30
專案敘述 .....	31
扶輪社員的參與及監督 .....	32
對社區的影響 .....	33
財務報表 .....	34
額外的資訊 .....	35

## 附錄

A. 扶輪基金會的政策 .....	38
人口成長與發展 .....	38
扶輪徽章與名稱使用規範 .....	38
其他扶輪基金會的政策 .....	39
B. 社區需求評估 .....	40
C. 獨立財務審查 .....	42
D. 循環貸款基金/微型信貸 .....	43
E. 配合獎助金申請書樣本.....	44
F. 配合獎助金報告書樣本 .....	53
G. 配合獎助金資源名單.....	57



如何開辦一件配合獎助金案

## 何謂配合獎助金？

配合獎助金支援扶輪社員的國際性人道性專案。必須由來自至少兩個國家的扶輪社或地區（一個專案所在國家以外的夥伴以及一個在專案所在國家內的夥伴）共同合作來規劃、執行、以及撰寫報告。配合獎助金是設計來支援相對上較小、只支付一次的人道性服務計畫。獎助金獎給多樣性的專案，像農業、水、醫療服務/設備、對抗疾病，協助失能者、識字以及改善計算能力的專案，以及教育/職業訓練。這些專案必須納入扶輪社員的積極親身參與。

有兩大類的配合獎助金：配合獎助金與競爭性配合獎助金。配合獎助金獎助範圍在 US\$5,000 到 \$25,000。競爭性配合獎助金獎助範圍在 \$25,001 到 \$150,000。（有關競爭性配合獎助金更多的資訊請參考 p3）

對於配合獎助金的資助是根據扶輪的專案夥伴所提出的捐獻。扶輪基金會對於每 US\$1 的現金捐獻相對提供 \$0.5；而對於每 \$1 的 DDF(SHARE) 則以 \$1 配合。

## 配合獎助金的流程

配合獎助金的流程包含謝列步驟。

### 專案設計

- 地主夥伴找到社區的需求。有關社區需求的資訊請見 p10。
- 找到國際上的專案夥伴（有關如何找到一個夥伴的建議請見 p7）。
- 專案夥伴合作以設計一套專案計畫與預算。

### 申請

- 專案夥伴們向扶輪基金會提出撰寫好的配合獎助金申請書。
- 告知收到申請書，並指並一個案件編號給它。
- 人道獎助金計劃的職員審查申請書，如需要更多的資訊可以聯絡各夥伴。

### 決定

- 人道獎助金計劃職員將申請書轉交 TRF 保管委員會讓他們審查並決定。
- 專案夥伴們被告知保管委員會的決定。如被核准，專案的主要聯絡人將會收到一份通知函，對於付款流程給予指示。

### 執行

- 專案夥伴履行付款條件。
- TRF 釋出獎助資金。
- 專案夥伴們執行專案。
- 專案夥伴們至少每 12 個月提交進度報告，直到專案完成。
- 專案夥伴們在專案完成後兩個月內提交最終報告。
- TRF 將此配合獎助金案結案。

及時的將撰寫好的申請書與其他所有被要求的資料提交出去可以加速您的申請流程。貴地區的獎助金小組主委可以在此流程中協助您。

## 配合獎助金作業週期

保管委員會建立以下作業週期以創造一個讓扶輪社與地區以及 TRF 職員處理配合獎助金的申請、獎助金的獎與、以及報告的有系統的方式。

7 月 1 日~3 月 31 日：扶輪社及/或地區提出申請書\*

8 月 1 日至 5 月 15 日：TRF 核准申請。

\*在 3 月 31 日截止日期以後收到的申請書將會被退回給贊助者，他們可以將之更新，並在下一個扶輪年度重新申請。

## 競爭性配合獎助金的申請

競爭性配合獎助金是向 TRF 申請金額超過 US\$250,001 以上者。競爭性獎助金的申請每年在 10 月與 4 月的保管委員會集會時接受申請兩次。

申請截止日期	保管委員會決定時間
8 月 1 日	10 月/11 月 保管委員會集會
1 月 1 日	3 月/4 月 保管委員會集會

如果您的獎助金申請是 US\$25,001 以上時，必須包括社區需求評估。有關社區需求評估更多的資訊請見 p40。此一評估必須表現出本專案如何：

- 將受益社區納入參與
- 在獎助資金使用完後仍能存活並維持下去

## 配合獎助金合格性的規範與標準

### 配合獎助金合格性的規範

- 當來自不同國家的扶輪社共同合作以執行由專案所在地的扶輪社所發起的專案，而以提供永續性發展為目標時，配合獎助金必須協助強化扶輪網絡。獎助資金的使用必須：
- 解決一項有益於需求社區的人道性問題
- 要有顯著的扶輪社員參與並且有明顯的扶輪的識別標誌
- 要讓接受社區整體受益
- 不可以讓扶輪社員，扶輪社、地區、或其他扶輪單位、或國際扶輪的僱員，或是任何健在的扶輪社員或扶輪的僱員的配偶、直系後代(血緣或合法認養的兒女)、直系後代的配偶、或直系前代(血緣的父母或祖父母)直接獲利
- 排除任何除了獎助金金額以外對於扶輪基金會或國際扶輪的債務
- 不能用來對於任何單一受益者，合作機構，或專案過度的支援

以下的表格列出透過配合獎助金籌資時的合格與不合格的品項。

合格	不合格
循環貸款/微型信貸	設立永久性基金會、信託戶、或是永久性孳息帳戶
短期租用或租賃建築物	購置土地或建築物
公共建設像是支線道路、水井、蓄水池、水壩、橋樑、公共廁所、社區廁所、供水設備以及其他類似結構的建造。	建造或是翻修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。這包括建築物、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，像生產、處理、維修、或貯藏，的結構，包括提供新的服務或是設備的升級。
購置設備或用具	在建築物內提供配管或供電
爲了專案的執行的短期及/或約僱勞工	替另一機構服務人員的薪水
專案活動的行政管理支出	另一個機構的運作或行政管理支出
國小與國中的教育、學費、運輸	高中以上教育活動、研究、或個人的專業發展
國內旅行	國際性旅行
詳細、分項列舉的支出	偶發性、混雜的支出
協助地雷的受害人	除去地雷
宣傳的支出，像報紙刊登費，或海報、小冊、或傳單，以告知社區有一項服務可利用	扶輪的招牌
疫苗與接種，如果此專案符合消除小兒麻痺等計畫以及世界衛生組織的準則、程序、以及政策	超越國界運送疫苗或接種疫苗
新的扶輪所贊助的專案，並非已經進行中或已經完成的專案	已經開始而且正進行中的專案，現有的專案，主要是由非扶輪機構所贊助的專案，或是已經完成的專案
母親以及產前健康與教育	購置及分發避孕裝置以及用來分辨性別的超音波儀器
編列好預算並分項列舉的人道性物品	不明確的開支或是對於受益者或合作機構的現金捐贈
有益於需求社區的人道性或服務性活動	募款活動，與扶輪節目有關的支出，像地區年會或週年慶或不包含人道觀點的娛樂性活動
有益於需求社區的世俗性，非宗教性活動	支援在教堂或是其他禮拜地點的純宗教儀式的專案

## 扶輪社員的參與

來自雙方夥伴扶輪社或地區的扶輪社員必須積極參與每一個配合獎助金專案，並且要為專案的執行與報告向 TRF 負責。要求的扶輪社員的活動如下：

配合獎助金(US\$5,000-25,000):

- 在專案進行期間保持溝通與對話
- 地主與國際夥伴雙方設立一個至少三位扶輪社員的委員會
- 共同評估社區的需求並規劃本專案
- 在配合獎助金申請書中提供一段文章概要描述所有非財務性的參與
- 視需要訪視專案所在地
- 管理獎助資金以及監督本專案

競爭性配合獎助金(US\$25,001-150,000): 以上全部再加上

- 提供社區需求評估
- 提供顯示本專案如何存活以及維持的資訊
- 提供社區參與以及擁有權的證據

下列為建議給夥伴扶輪社/地區雙方的其他活動：

- 設計活協助設計專案
- 在現場管理專案
- 在專案的執行中提供專業技術
- 成立一個社區服務團以支援本專案的某些方面
- 提供義工服務以及訓練義工
- 捐獻或是尋求捐獻金錢、物品、以及服務以維持或擴展此專案
- 與政府機關或海關官員聯絡
- 代表出席與合作機構/政府機關的專案中心委員會
- 向當地媒體以及在扶輪的地區及地帶會議中宣傳本專案
- 與專案委員會合作或是在專案所在地分享專業技術
- 出席重要的專案活動或慶典
- 安排運送補給品、設備、或物資到專案所在地

## 夥伴們的捐獻

下列資訊適用於所有夥伴們的捐獻：

- 配合獎助金夥伴們的捐獻被認為是對 TRF 的指定用途捐獻，因此不能包括於地區的捐獻總額內。
- 保羅哈里斯之友(PHF)表彰積點只獎給寄到 TRF 或是 RI 辦事處或是財務專員的贊助捐獻；PHF 表彰積點不會獎給直接寄給專案的贊助捐獻。
- 寄到 TRF 或是 RI 辦事處或是財務專員的夥伴捐獻超出配合獎助金同意書上所明訂金額的部份將被視為年度捐獻獎以積點，而不會轉到專案去。此類的捐獻會被包括於地區的捐獻總額內。
- 在保管委員會核准配合獎助金以前寄到 TRF 的捐獻不能供特定獎助金使用。
- 必須有相當比率\*的捐獻是來自專案所在以外國家。
- 現金捐獻以 0.5:1 配合；SHARE/DDF 捐獻以 1:1 配合
- 專案預算可以由來自非扶輪來源的資金補足；不過，TRF 只會配合扶輪社與地區捐獻的資金。此外，TRF 也不會對於任何捐給本專案的任何物品或服務做配合。
- 對於所有地主夥伴所要求的最低捐獻是 US\$100(現金或 DDF)。
- 如果獎助金被取消；現金捐獻將被轉到年度計劃基金。

## 報告

在專案執行期間每 12 個月要交進度報告，詳述專案的進度。在專案完成後兩個月內要交最終報告。

**\*專案全部現金與 DDF 的 30%**

## 第 1 章

如果專案夥伴們對於某一現有的配合獎助金案未提供進度報告或是有過期的最終報告，新的申請案會被退回給地主夥伴。此會影響到國際與地主夥伴雙方。

對於 US\$250,001 以上的獎助金，或是有表達出要求時，必需要有一份年度的獨立財務審查。(要更多資訊請見 p42)。

### 時間限制

TRF 對於人道獎助金的核准、付款、以及執行設有截止日期。配合獎助金的申請與核准必須在 TRF 收件後 6 個月內完成。對於核准的配合獎助金的付款條件必須在獎助金核准後 6 個月內完成。如果一件已付款的配合獎助金在 12 個月內未執行，該獎助金會被取消。

### 合作機構

一件與其他機構合作的獎助金必須符合下列條件：

- 扶輪夥伴(們)必須清楚展現此專案是由參與的扶輪社或地區所發起、控制、以及辦理；扶輪社員必須以奉獻他們的時間、資源、以及親身涉入的方式來參與本專案。
- 地主扶輪社或地區必須對於合作機構有清楚的了解，並且提供一份背書信函聲明該合作機構信譽良好且負責，而且該機構有註冊並且遵守專案所在國的法律行事。
- 此合作機構必須提出一份信函聲明它同意參與，並且在任何對於與本專案有關聯活動所作的財務審查合作。
- 每一扶輪年度內能夠與其他機構合作的獎助金限於 8 件。

### 地區扶輪基金委員會的責任

地區扶輪基金委員會(DRFC)是一群有經驗而且肯奉獻的扶輪社員，他們協助總監教育、激勵、以及鼓舞扶輪社員參與地區內的基金會計畫以及募款活動。DRFC 主委擔任地區內所有與基金會相關事務的專家，並作為 TRF 與扶輪社社員間的主要橋樑。

DRFC 主委特別與配合獎助金有關的有：

- 與 DRFC 成員合作以決定地區指定基金(DDF)的分配，對於 DDF 的使用提供授權簽署，以及維護正確的記錄以反映出 DDF

被分派到的專案以及獎助金核准的專案。

- 促進所有地區內扶輪社所贊助的配合獎助金能夠即時而且完整的向 TRF 提交報告。
- 與獎助金小組委員會的成員在地區的管理以及監督功能中合作以促進對於人道獎助金計劃要求的服從並確保任何問題都能馬上向 TRF 報告。

### 地區獎助金小組委員會主委的責任

地區獎助金小組委員會負責協助扶輪社設計參與國際性服務專案的方式。小組委員會指導扶輪社或地區有關哪一類的獎助金可以協助他們執行他們的專案。小組委員會擔任希望參與 TRF 獎助金的扶輪社員在地資源，可以向他們解釋獎助金的準則與各項截止日期，以及協助扶輪社完成成功的專案。小組委員會主委的角色是透過人道獎助金專案的過程—由申請書提出到專案完成—來指導與協助扶輪社。

地區獎助金小組委員會主委特別與配合獎助金有關的有：

- 審查地區內扶輪社以及地區本身的所有獎助金申請書，並經由簽署申請書來證明所有的申請書在提交 TRF 以前都已經完備而且正確。
- 授權地區所贊助的配合獎助金案
- 維護地區內的獎助金活動的記錄
- 與 DRFC 成員合作以決定 DDF 的分配
- 在配合獎助金的會計上鼓勵最高水準的管理以透明度。這包括與 DRFC 合作以鼓勵以及支援所有受核准的獎助金的報告能夠即時的提交 TRF。

### 如何找到一個夥伴

扶輪社員經常要求 TRF 是否能夠協助他們的扶輪社或地區替他們的專案找到一個夥伴。雖然 TRF 目前並沒有一個為有興趣的夥伴配對的計畫，它有幾個建議可以協助貴社自力找到一個夥伴。

- 向您的地區總監當選人(DGE)簡報專案的企劃。DGE 參加國際講習會時會有機會向他國的 DGE 談到就某一專案合作的可能性。
- 告知貴地區計畫參加國際年會的扶輪社員有哪些貴地區或其扶輪社有哪些可能的專案在尋找夥伴。在國際年會期間，您地區的扶輪社員可以就專案的合作與其他年會的出席者討論。
- 貴地區可能有機會送一團團體研究交換(GSE)團隊到另一個國家。提供團隊成員有關貴社或地區有一個可能的專案正在尋找國際夥伴。團隊成員可以與他們的接待扶輪社員討論此專案。當貴地區接待一個 GSE 團隊時，告知團隊成員有哪些可能的專案，這樣當他們返國時，他們可以告訴其他扶輪社員這些專案。

- 您可以經由在**世界社區服務(WCS)專案交換**此一促進世界不同地方的扶輪社與地區間專案的接觸的網頁上註冊而找到夥伴。扶輪社與地區可以經由上傳一份撰寫完成的專案資料表來註冊。表格以及其他 WCS 的資訊可以由 RI 網站 [www.rotary.org](http://www.rotary.org) 取得。該網站也容納有 **WCS 專案交換資料庫**，列出所有尋求謝助的專案。
- 您也可以透過事業的接觸或旅行為可能的專案找到夥伴。當出國旅行時，扶輪社員如果在國外補出席參加扶輪社例會可能會有很好的機會與其他國家的扶輪社員討論他們的專案。

扶輪社員經常詢問有關某一扶輪社或地區參與配合獎助金的合格性。如果一個扶輪社在先前的獎助金案過期為提交報告或是未向國際扶輪繳交其半年費，它就沒有資格參與配合獎助金。如果您有興趣知道到底一個潛在的夥伴能否參與，您必須與該扶輪社直接聯繫。如果該扶輪社不能確定它的合格地位，它可以聯絡 TRF 得到澄清。

### 管理工作

扶輪基金保管委員會認為右全世界扶輪社員所收到的資金都是志願的捐獻，反映出他們的勤奮工作與毫無保留的支持。這些扶輪社員將他們的捐款委託給扶輪基金會是抱著信任以及瞭解它們會被有效率的並且是遵照它們捐獻的目的來使用。因此，扶輪基金保管委員會盡其全力來扮演這些資金的管理者，在任何與扶輪基金會的計畫有關的活動中強調適當的預算管理的重要性。保管委員會指望扶輪社與地區的正直，如果有任何不當的行為被他們注意到，就會迅速調查，並且採取任何適當的行動。

配合獎助金受獎人被期待：

- 視扶輪基金會的獎助金為一種神聖的託付，始終保護免於損失，濫用，或挪用，並且必須只使用於已經陳明的用途，而且此用途必須嚴格詮釋。
- 要保持最高度的警覺預防扶輪基金會資金被以不當的方式使用，即使僅是表面觀

- 感，不論此一表面觀感是在扶輪社員眼中或是一般大眾。我們要求此一警覺性要超越施行於對於私人或公司資金的使用上。
- 保證對於本專案有稱職並且週密的監督，並有清楚的責任界定。
- 至少要以標準商業行為的水準來進行所有財務交易以及專案有關的活動，並且隨時要符合“事業與專業的扶輪社員聲明”，而且要完全符合“四大考驗”的精神。
- 對於獎助金相關活動有任何不當行為要馬上向扶輪基金會報告。
- 要按照保管委員會在獎助金撥付中所核准的內容來執行專案。任何對於已同意的約定的偏離或是在專案的執行有變更時，必須事先得到扶輪基金會的書面授權。
- 遵照當前保管委員會的政策與規範安排成妥審查及/或財務審查。
- 即時而且詳細的報告計畫與財務活動。

對於已經發出通知的任何有關專案執行的疑慮負有適當處理的義務。



如何撰寫配合獎助金申請書

## 第 2 章

本章將一步一步解釋如何撰寫一份配合獎助金申請書的每一區塊，回答常見問題，並提供有

用的提示。配合獎助金申請書只能從 RI 網站下載。

### 專案描述

**Matching Grant Application**  
**The Rotary Foundation (TRF)**

**PROJECT DESCRIPTION**

Rotarians Matching Grants support the humanitarian work of Rotary clubs and districts. In this section, describe in detail the humanitarian need your project will address, the amount of the project, how the project will be implemented, and how Rotarians will be directly involved in the project. Involvement is required of both the host and international partners.

Please provide the name of the project site, the city or village, state or province, and country. List multiple locations, if applicable.

Project title \_\_\_\_\_  
City/Village \_\_\_\_\_  
State/Province \_\_\_\_\_  
Country \_\_\_\_\_

Describe the project and the problem or need it will address, including the intended beneficiaries and how the project will benefit the community in need. Provide the estimated length of time needed to complete the project.

Describe how the benefiting community will maintain this project after grant funding has been fully expended.

Describe specific activities of the host and international partners in implementing the project. What will the Rotarians who are members of the partner clubs do during the project? Please note that financial support is not considered active involvement. (See the Matching Grant application instructions for suggestions.)

解釋：

配合獎助金支援扶輪社與地區的人道服務專案。在本節，請詳述您的專案所要處理的人道性需求、本專案的意圖、本專案將如何執行，以及扶輪社員將如何直接參與本專案。地主與國際夥伴雙方的參與都是必須的。請注意對於專案的財務捐獻並不被認為是積極的參與。

回答下列問題可以協助您清楚的勾勒出您的專案：

- 將會有哪協活動進行？
- 本專案將在這裡辦理？
- 誰會受益於本專案？
- 受益社區如何維持本專案？
- 扶輪社員將如何參與本專案？他們將進行哪些特定活動？

### 常見問題

*我如何知道我們是否選了一個好的專案？*

設法找到一件符合受益社區真正需求並且會納入您的社員多方面技巧與興趣的專案。如果您選的專案對貴社而言是一項新的活動，開始時先從小並且容易管理做起。您可以利用最初的經驗來朝未來參與程度更大的專案努力。

*我們扶輪社將募款來支援我們的專案。這算不算“積極參與”？*

雖然對一個專案的捐獻非常重要，卻不符合保管委員會扶輪社員積極參與的要求。地主與國際夥伴雙方扶輪社必須透過規劃、執行、溝通、以及報告來積極參與本專案。

*保管委員會希望我們與專案的夥伴溝通，但他們居住再世界的另一端，所用的語言也不同。我們如何能確實的做到這點？*

夥伴們可以利用現代科技來協助他們有效率的溝通。定期的 e-mail/傳真報告，每季一次電話會議、以及現場訪視都是讓您的夥伴隨時得到新的消息的很好的方式。您的專案委員會如有人會講您夥伴的語言也會有幫助。

### 您可記得...

1. 提供您想要達成什麼目的的完整概念？
2. 發現有需求的族群？
3. 務使本專案符合配合獎助金的準則？
4. 容許足夠的時間來處理申請案？

## 地主/國際夥伴

**HOST PARTNER**

**Explanation:** The host partner is the club or district in the project country. A committee of at least three Rotarians must be established to oversee the project. The primary project contact must be a member of the primary club identified below. The project committee must be composed of members of the same Rotary club for club-sponsored projects or districts for district-sponsored projects. The committee members must be contacted for the duration of the grant process. Please provide the primary address for all committee members, as all Rotary information will be sent to this address. It is highly recommended that the primary contact (who receives all information from TRF) have an e-mail address to expedite communication.

**Primary Club/District**

Club \_\_\_\_\_ Club ID number (if known) \_\_\_\_\_  
 District \_\_\_\_\_ Country \_\_\_\_\_

**Primary Contact:**

Name \_\_\_\_\_ Member ID \_\_\_\_\_  
 Club \_\_\_\_\_  
 Rotary position \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_  
 State/Province \_\_\_\_\_ Postal code \_\_\_\_\_ Country \_\_\_\_\_  
 E-mail \_\_\_\_\_  
 Home phone \_\_\_\_\_ Office phone \_\_\_\_\_ Fax \_\_\_\_\_

**Project Contact #2:**

Name \_\_\_\_\_ Member ID \_\_\_\_\_  
 Club \_\_\_\_\_  
 Rotary position \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_  
 State/Province \_\_\_\_\_ Postal code \_\_\_\_\_ Country \_\_\_\_\_  
 E-mail \_\_\_\_\_  
 Home phone \_\_\_\_\_ Office phone \_\_\_\_\_ Fax \_\_\_\_\_

**Project Contact #3:**

Name \_\_\_\_\_ Member ID \_\_\_\_\_  
 Club \_\_\_\_\_  
 Rotary position \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_  
 State/Province \_\_\_\_\_ Postal code \_\_\_\_\_ Country \_\_\_\_\_  
 E-mail \_\_\_\_\_  
 Home phone \_\_\_\_\_ Office phone \_\_\_\_\_ Fax \_\_\_\_\_

## 解釋

配合獎助金是由專案所在國的一個主要扶輪社或地區(地主夥伴)以及專案所在國以外的一個主要扶輪社或地區(國際夥伴)所贊助。地主與國際夥伴雙方都必須設立一個至少 3 位扶輪社員的委員會來自始至終監督此專案，即或它是跨越扶輪年度。該委員會致力於與另一夥伴保持溝通、保存所有記錄、協助確保獎助金的適當管理、以及擔任與 TRF 的聯絡人。

於扶輪社所贊助的專案其專案委員會必須由贊助扶輪社的社員所組成；而於地區所贊助的專案則由地區的社員所組成。專案主要聯絡人必須為主要扶輪社的社員。我們高度建議專案主要聯絡人(要接收所有來自 TRF 的資訊)要能進入 e-mail。

## 常見問題

**專案聯絡人與委員會成員一定要是扶輪社員嗎？**

是的。獎助金須由扶輪社員所贊助及執行。扶輪社員，而非合作機構成員，應與 TRF 保持聯絡。

**為何合作機構的職員不能作為共同贊助扶輪社之間的主要聯絡人？**

TRF 將資金託付給扶輪社與地區以及扶輪社員；他們被期待直接參與專案的執行。

**如果專案聯絡人彼此不認識呢？**

專案聯絡人必須確定他們在提交申請書以前已經建立了很好的合作關係。請記得，配合獎助金的目標之一就是發展瞭解與和平，這只有透過溝通才能達成。使用 e-mail 是一個與您的夥伴保持持續聯絡的相當簡單而且物超所值的方式。

## 您可記得...

1. 在地主與國際雙方的國家設立至少 3 位扶輪社員的委員會？
2. 包含所有成員的完整，最新，以及正確的住址、電話與傳真號碼(含國碼與程式碼)、以及 e-mail 信箱？





專案規劃



解釋

在申請書提交 TRF 以前，專案夥伴們應討論規劃的各項細節。所有可適用的問題都必須回答。

在本節您要您要解釋誰將擁有所有以獎助資金購置的物品與設備。要記住，獎助金購置品不能讓扶輪社、地區、或扶輪社員擁有。您必須解釋誰將負責所有以獎助資金購置的品項的維修與操作費用。您必須指出誰將提供誰將對技術性設備的使用提供訓練，以及是否需要軟體來操作該設備。如果這些品項要向國外採購並

運送，您必須表明對於通關做了哪些安排。最後，在本節您必須證實如果需要配管與配電時，他們必須由獎助資金以外的金錢資助。

常見問題

*誰將擁有將要購置的物品與設備不是很明顯嗎？*

並不一定。TRF 必須得到您的證實誰將擁有並維護本設備。如果預算品項中包含外科或其他難以界定的品項，請註明誰將是受益者。

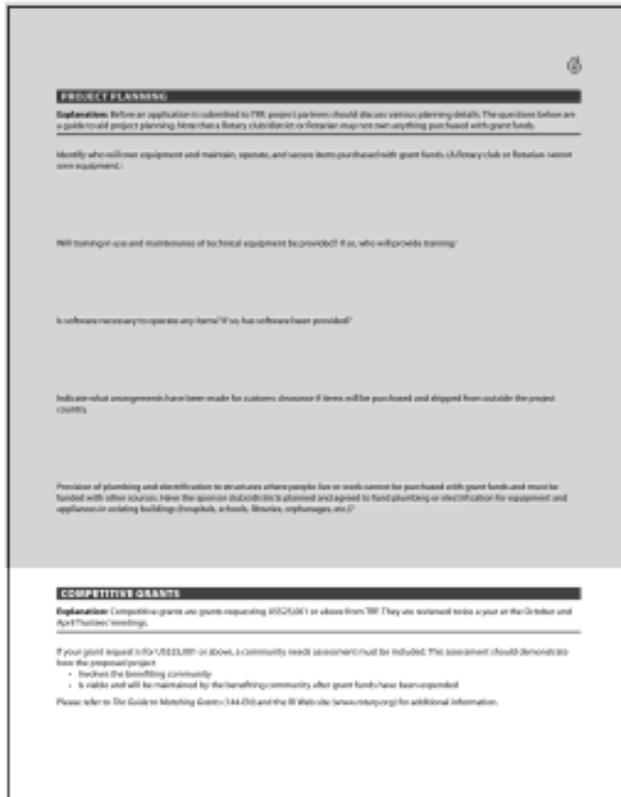
*我並不知道誰將負責維修設備或是我們如何安排通關事宜。我如何撰寫本節？*

除非所有規劃都已完成，請不要提出您的配合獎助金申請書。一定要與您的夥伴密切合作，他們或許能夠協助通關事宜。

您可記得...

1. 表明誰將擁有您預算中所列的物品與設備？
2. 陳述誰將維護這些品與設備？
3. 對於任何要運送過國界的品項安排通關事宜？請確認任何國內/通關的費用都包含在您的預算中，或是您有其他的資源可以用來涵蓋這些費用。

## 競爭性獎助金



工作是否成功或是需要修正。本評估展現出本專案如何

- 納入受益社區的參與，包括本專案的擁有權
- 在獎助資金使用完後仍能夠存活，並將由受益社區維護

有關社區需求評估更多資訊請見 p40。

### 常見問題

*扶輪社與地區如何進行一項社區需求評估？*

在一項評估中要考量的一般性因素包括

- 社區的優點與資產
- 社區的短期與長期需求
- 政府與社區組織所提供的服務
- 機會
- 挑戰
- 可利用的資源(財務以及人力)

### 解釋

競爭性獎助金是向 TRF 申請 US\$25,001 以上。(請注意此一\$25,001 的限制是指由 TRF 獎助的金額，不是整個專案的費用。)由於專案規模大，這些申請需要額外的前置規劃，而且有較多的要求。競爭性獎助金每年於 10 月與 4 月的保管委員會集會時審查兩次。

如果您的獎助金申請是 US\$25,001 以上時，必須包含社區需求評估。需求評估讓扶輪社或地區能找到社區最迫切的需求，以及評量目前的

### 您可記得...

- 對於獎助金申請 US\$25,001 以上時，包含社區需求評估？

授權

7

**AUTHORIZATIONS**

**Explanation:** Authorizations ensure that both partners are aware of, and interested in, pursuing the described project. By signing below, the current club presidents for club-sponsored projects and current district grants subcommittee chairs for district-sponsored projects, as well as the committee members, agree to the views listed and affirm their support of the project.

All Rotary clubs, districts, and Rotarians involved in this project are responsible to The Rotary Foundation (TRF) for the conduct of the project and its subsequent reporting. The signatures of all involved parties confirm that they understand and accept responsibility for the project. Parties may either sign this page or submit a separate letter of commitment.

By signing below, we agree to the following:

- All information contained in this application is, to the best of our knowledge, true and accurate, and we intend to implement the project as presented in this application.
- The subcommittee agrees to undertake the project as an activity of the subcommittee.
- We ensure all cash contributions (as detailed in Project Financing) will be forwarded to TRF or directly to the project account after TRF's approval of the grant.
- All and TRF may use and information contained in this application to promote the project by various means such as The Rotarian, the TRF international conference, PRRI The Rotarian Video Magazine, etc.
- The grantee agrees to share information on best practices when asked, and TRF may provide partners' contact information to other Rotarians who may wish advise on implementing similar projects.
- To the best of my knowledge and belief, except as disclosed herein, neither I nor any person with whom I have or had a personal or business relationship is engaged, or intends to engage, in benefiting from TRF grant funds or has any interest that may represent a potential competing or conflicting interest. A conflict of interest is defined as a situation in which a Rotarian, in relationship to an outside organization, is in a position to influence the spending of TRF grant funds, or influence decisions in ways that could lead directly or indirectly to financial gain for the Rotarian, a business colleague, or his or her family, or give improper advantage to others in the interest of TRF (MTRF). Any and all exceptions must be explained in an attached statement.

Head Partner		International Partner	
<input type="checkbox"/> Club president (club-sponsored)			
<input type="checkbox"/> District grants subcommittee chair (district-sponsored)			
Name	Name	Name	Name
Title	Title	Title	Title
Rotary Club	Rotary Club	Rotary Club	Rotary Club
District #	District #	District #	District #
Signature	Signature	Signature	Signature
Date	Date	Date	Date
Primary Contact		Primary Contact	
Name	Name	Name	Name
Signature	Signature	Signature	Signature
Date	Date	Date	Date
Project Contact #1		Project Contact #1	
Name	Name	Name	Name
Signature	Signature	Signature	Signature
Date	Date	Date	Date
Project Contact #2		Project Contact #2	
Name	Name	Name	Name
Signature	Signature	Signature	Signature
Date	Date	Date	Date
Project Contact #3		Project Contact #3	
Name	Name	Name	Name
Signature	Signature	Signature	Signature
Date	Date	Date	Date

要記住任何寄到 TRF 的申請書若無簽署將會被退回專案夥伴。

常見問題

我的專案夥伴住在 8,000 哩外。我們然到要簽署同一份文件嗎？

不必。簽署頁可以各自上傳。不過，重要的是所有的簽署頁要與撰寫好的申請書一起上傳。所有不完整的申請書會被退回專案夥伴。

您可記得...

1. 對於扶輪社所贊助的專案取得扶輪社社長的授權？
2. 對於地區所贊助的專案取得地區獎助金小組委員會主委的授權？
3. 取得地主與國際夥伴雙方各全部 3 位委員的授權？

解釋

授權確保雙方夥伴都知悉並且有興趣進行所描述的專案。經由在本節提供他們的授權，職員們與委員會成員同意所列的準則並且確認它們對本專案的支持。扶輪社社長對於扶輪社所贊助的專案提供授權。地區獎助金小組委員會主委對於地區所贊助的專案提供授權。授權簽署可以以電子檔(掃描的簽署書)上傳、經由傳真、或是郵寄正本。

## 合作機構

**COOPERATING ORGANIZATION**

**Explanation:** A cooperating organization is an organization that is directly involved in the implementation of the project, offering technical expertise and project coordination. A beneficiary entity in the recipient of goods or services and is not considered a cooperating organization.

If this project involves a cooperating organization (whether a Rotary club or the beneficiary of the project), provide the following:

Name of organization \_\_\_\_\_  
 Street address \_\_\_\_\_  
 City, State/Province \_\_\_\_\_ Postal code \_\_\_\_\_ Country \_\_\_\_\_  
 Office phone \_\_\_\_\_ Fax \_\_\_\_\_  
 E-mail \_\_\_\_\_ Web address \_\_\_\_\_

In addition to the above, the following must be attached:

- Letter of participation from cooperating organization that specifically states:
  - its responsibilities and how it will interact with Rotarians
  - The organization's agreement to cooperate in any financial review of the project
- A letter of endorsement from the host partner confirming that the cooperating organization works within that country's laws

**FINAL REPORT**

**Explanation:** Although both partners are responsible for completing projects and final reports, the Trustees require that one partner take primary responsibility for submitting the final report to TRF. It is recommended that the club or district involving the funds should take primary responsibility.

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

Print name \_\_\_\_\_ Signature \_\_\_\_\_  
 Rotary club/district \_\_\_\_\_ District \_\_\_\_\_

**DISTRICT GRANTS SUBCOMMITTEE CHAIR REVIEW**

**Explanation:** The Trustees require that the district grants subcommittee chair (DGGC) from either the host or international sponsor district verifies 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, meets all TRF guidelines, and is eligible for funding."

Print name of DGGC \_\_\_\_\_ Signature \_\_\_\_\_  
 District \_\_\_\_\_ Date \_\_\_\_\_

### 解釋

如果貴扶輪社或地區正與另一發展或合作機構就本專案合作，您要在本節內讓我們知道。合作機構直接參與一個專案的執行，提供專業技術與專案協調。受益人是物品或服務的接受者，不可視為合作機構。供應商則是物品或服務的提供者。

對於每一個參與本專案的合作機構，申請書必須包括下列文件：

- 一份來自合作機構的同意參與信函，明確陳述：
  - 它的責任以及它如何與扶輪社員互動
  - 它同意在任何對本專案的財務審查合作
- 一份來自地主扶輪社背書信函，證明該合作機構遵守國家的法律行事。

### 常見問題

*合作機構，受益者，以及供應商的差別在哪裡？*

受益人是一件專案所提供的物品及/或服務的接受者(例如，接受設備或補給品的當地學校或醫院)。合作機構協助扶輪社員透過執行專案提供專業技術與職員(例如，一個協助扶輪社員提供醫療服務與補給品給難民營的醫療救援組織)。供應商則是提供以獎助資金購買的物品或服務的單位。

*我的扶輪社或地區可以讓合作機構運作整個專案嗎？*

不行。配合獎助金專案是一個扶輪優先於其他一切的專案。合作機構在那裡是來協助您，不是替您運作整個專案。專案受益人也應瞭解這是一件扶輪所贊助的工作。

### 您可記得...

1. 提供一份來自合作機構的信函表明它願意與扶輪社合作？
2. 提供一份來自專案所在國的扶輪社或地區的信函為該合作機構背書？

# 最終報告

**COOPERATING ORGANIZATION**

**Explanation:** A cooperating organization is an organization that is directly involved in the implementation of the project, offering technical expertise and project coordination. A beneficiary-only is the recipient of goods or services and is not considered a cooperating organization.

If this project involves a cooperating organization (other than a Rotary club) not the beneficiary of the project, provide the following:

Name of organization: \_\_\_\_\_  
 Street address: \_\_\_\_\_  
 City, State/Province: \_\_\_\_\_ Postal code: \_\_\_\_\_ Country: \_\_\_\_\_  
 Office phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
 E-mail: \_\_\_\_\_ Web address: \_\_\_\_\_

In addition to the above, the following must be attached:

- Letter of participation from cooperating organization that specifically states:
  - Its responsibilities and how it will interact with Rotarians
  - The organization's agreement to cooperate in any financial review of the project
- A letter of endorsement from the host partner confirming that the cooperating organization works within that country's laws.

---

**FINAL REPORT**

**Explanation:** Although both partners are responsible for completing progress and final reports, the Trustees require that one partner take primary responsibility for submitting the final report to TRF. It is recommended that the club or district receiving the funds should take primary responsibility.

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

Print name: \_\_\_\_\_ Signature: \_\_\_\_\_  
 Rotary club: \_\_\_\_\_ District: \_\_\_\_\_

---

**DISTRICT GRANTS SUBCOMMITTEE CHAIR REVIEW**

**Explanation:** The Trustees require that the district grants subcommittee chair (DGSC) from either the host or international sponsor 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, meets all TRF guidelines, and is eligible for funding."

Print name of DGSC: \_\_\_\_\_ Signature: \_\_\_\_\_  
 District: \_\_\_\_\_ Date: \_\_\_\_\_

## 常見問題

地主夥伴已經同意提交最終報告。這是否意味我們國際夥伴就沒有必要參與撰寫報告？

不是。配合獎助金獎助的條件之一就是由雙方夥伴同意他們要向 TRF 報告他們專案的成功。雙方夥伴的匯入資料是提供一份完整的報告所需要的。

我專案是否需要一份獨立的財務報審查？

申請 US\$25,001 以上的競爭性配合獎助金專案夥伴們被要求提交獨立的年度財務審查。TRF 也保留對於任何一件核准的獎助金要求獨立財務審查的權利。有關獨立財務審查進一步資訊請見 p42。

## 您可記得...

1. 選擇由哪一方夥伴負起主要的報告責任？
2. 在申請書上註明那個(負起主要報告責任的)夥伴？

## 解釋

雖然雙方夥伴都有責任撰寫進度報告與最終報告，保管委員會要求其中一方夥伴負起提交最終報告給 TRF 的主要責任。本節的目的是要協助夥伴們決定哪一方要負責提交報告以及確使這件事在提交申請書以前要討論好。建議由接受資金的扶輪社或地區負起報告的主要責任。

## 地區獎助金小組委員會主委證明

**COOPERATING ORGANIZATION**

**Explanation:** A cooperating organization is an organization that is directly involved in the implementation of the project, offering technical expertise and project coordination. A beneficiary only is the recipient of goods or services and is not considered a cooperating organization.

If this project involves a cooperating organization (not for a Rotary club nor the beneficiary of the project), provide the following:

Name of organization \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State/Province \_\_\_\_\_ Postal code \_\_\_\_\_ Country \_\_\_\_\_  
Other phone \_\_\_\_\_ Fax \_\_\_\_\_  
E-mail \_\_\_\_\_ Web address \_\_\_\_\_

In addition to the above, the following must be attached:

- Letter of participation from cooperating organization that specifically states:
  - Its responsibilities and how it will interact with Rotarians
  - The organization's agreement to cooperate in any financial review of the project
- A letter of endorsement from the host partner confirming that the cooperating organization works within that country's laws.

**FINAL REPORT**

**Explanation:** Although both partners are responsible for completing progress and final reports, the Trustees require that one partner take primary responsibility for submitting the final report to TRF. It is recommended that the club or district receiving the funds should take primary responsibility.

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

Print name \_\_\_\_\_ Signature \_\_\_\_\_  
Rotary club \_\_\_\_\_ District \_\_\_\_\_

**DISTRICT GRANTS SUBCOMMITTEE CHAIR REVIEW**

**Explanation:** The Trustees require that the district grants subcommittee chair (DGGC) from either the host or international sponsor district certifies 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, meets all TRF guidelines, and is eligible for funding:"

Print name of DGGC \_\_\_\_\_ Signature \_\_\_\_\_  
District \_\_\_\_\_ Date \_\_\_\_\_

### 常見問題

地區獎助金小組委員會是否有權核准我的獎助金？

沒有。所有 TRF 獎助金的核准在保管委員會。地區領導人是要指導申請的流程。

為何地區獎助金小組委員會要求在提交 TRF 以前檢視我的申請書？

保管委員會期待地區獎助金小組委員會能擔任地區與扶輪社的在地資源，協助他們確保他們的申請書都是正確而且完備的。

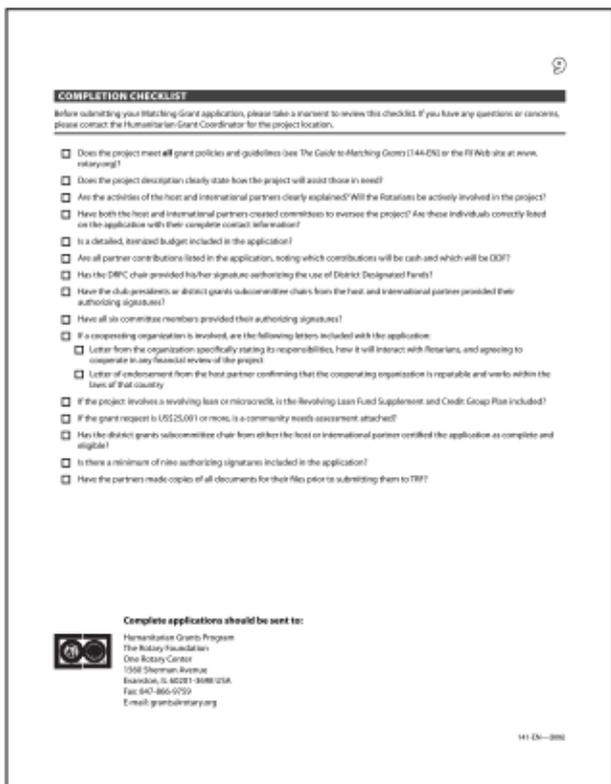
### 您可記得...

1. 要求地主或國際夥伴的地區獎助金小組委員會證明本身請書是完備的？

### 解釋

保管委員會要求不論是地主或是國際贊助地區的地區獎助金小組委員會主委都要證明本身請書是完備的。如果該申請書不完備或不合格，它會被退回地主夥伴並附有簡短解釋。

## 完成核對清單



### 常見問題

核對清單有要求(附上)嗎?

沒有，但它是一個很有用的引導。如果有某些項目沒有被勾掉，那就是有某些資料欠缺的很好的指示。不完備的申請書送到 TRF 會被退件。

*我並沒有完成申請書所需要的全部的資訊，但我還是想將他送到 TRF 讓它“朦朧過去”。這是個好主意嗎？*

不是。不完備的申請書會被退回地主夥伴，只有少許的解釋。只有完備的申請書才能提交。申請書的核對清單以及您的地區獎助金小組委員會會協助您確定您的申請書是否完備。

### 您可記得...

1. 達成完成核對清單內的所有項目？

### 解釋

完成核對清單目的是提供您一個協助確保您的申請書完備的工具。在提出您的申請書以前，請檢視本核對清單，並確定所有項目都已達成。



獎助金被核准後有哪些事呢？

## 第 3 章

一旦您的獎助金申請被保管委員會核准，您可以開始執行您的專案。您可以選擇先以您自己的資金來開始執行本專案，或是等收到 TRF 的資金。一旦您的獎助金被核准，您會透過 e-mail 或是郵寄收到一份資料袋。此資料袋包含下列

資訊：配合獎助金通告信函、配合獎助金同意書、配合獎助金受款人資料表、以及捐獻表單 (123-EN)。本章將讓您熟悉這些文件，帶領您通過取得您的獎助資金所涉及的每一步驟，以及對於成功的執行您的專案提供建議。

### 配合獎助金通知函



**THE ROTARY FOUNDATION**  
of Rotary International  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA

16 November 2005

**Host Partner**  
Sam Appiah, Primary Contact  
Rotary Club of Accra Downtown, D9000  
P.O. Box 23104  
Accra  
GHANA  
Email: sappiah@email.com  
Fax: 233 21 555 555

**International Partner**  
Mary Smith, Primary Contact  
Rotary Club of Evanston Downtown, D6010  
3521 Central Street  
Evanston, IL 60201  
USA  
Email: msmith@email.com  
Fax: 847 565 5555

**Ref: Matching Grant # 58101**

Dear Rotarians Wilson and Smith:

Congratulations! Your Matching Grant application, submitted by the Rotary Club of Accra Downtown, D9000 and the Rotary Club of Evanston Downtown, D6010 for funding to provide equipment and materials for drying mangoes to the Good Life Women's Co-op in Accra, Ghana, has been approved by The Rotary Foundation (TRF). The award is in the amount of USD8,000.

This letter serves as formal notification of approval and will help to identify what is needed to receive payment. For all grants, the primary partners must both sign the **Agreement Form** and ensure correct **Payee Information** is sent to TRF. Any additional information and/or sponsor contributions TRF requires in order to make grant payment are described in this letter and the Agreement Form.

- Agreement Form.** This document details the agreement between the primary clubs/districts involved in the grant and the Foundation. Be certain to refer to this document throughout the implementation of the project to ensure compliance with TRF requirements. The Agreement Form should be signed and sent directly to The Rotary Foundation to the attention of the Grant Coordinator via e-mail, fax or mail.
- Payee Information Form.** This document must be completed and returned to TRF stating where and how funds should be sent to the project. Please coordinate with your partner to establish an appropriate payee.
- Contributions.**
  - Contribution form.** This form is attached and should be used for all cash contributions sent to The Rotary Foundation for your project. The Matching Grant number must be stated on the form to ensure that your contributions are correctly received. Should you choose to send cash contributions directly to the project, or the contribution is in the form of DDF/Share funds, this form will not be needed.
  - Funds Sent Directly.** If cash contributions are being sent directly to the project account you must send confirmation that the contribution has been received for the project (a copy of the deposit slip, bank statement, paid invoice, etc.) NOTE: Paul Harris Fellow Recognition credit will not be awarded for contributions sent directly.

- Payment Contingency.** Payment of this grant is contingent upon receipt of confirmation that the co-op building has been constructed and is ready to receive the equipment.
- Closure contingency.** Closure of this grant is contingent upon submission of copies of receipts for all equipment purchased.

Note: There is a limit of 6 months from the date of this letter to submit all the information needed for payment. Should the required forms and contributions not be received within 6 months, the grant may be cancelled. It is extremely important to remain in constant contact with your partner to ensure the above requirements are completed.

Both partners are sent a copy of this letter and included forms. It is not necessary to have all authorizing signatures on the same document as they can be sent in separately. Keep a copy of the signed forms for your records before returning them to TRF. Faxes are acceptable, and originals are not required.

Additional information you will find helpful is included. (If you are receiving this document via e-mail, please see the accompanying e-mail message for links to the documents on the RI website.)

- Terms and Conditions of Matching Grant Award** is a document that details the guidelines for implementing your project. Read this document carefully, and refer to it when you have questions about TRF requirements.
- Report Form.** Reporting on your project is mandatory. Progress reports are due at least every three months, and a Final Report must be submitted within two months of your project's completion.
- Humanitarian Programs Promotional Guide** contains information about how to promote your project in the community and in the media.

If you have any questions, please contact me.

Sincerely,

William Smith  
Grant Coordinator  
Humanitarian Grants Program  
The Rotary Foundation  
Phone: (847) 866 3000  
Email: william.smith@rotary.org  
Fax: (847) 866 9759

cc: Mohamed Soumah, Governor, Rotary District 9000  
Elizabeth Peterson, Governor, Rotary District 6010  
Andrew Wilson, District Rotary Foundation Committee Chair, District 9000  
John Dawson, District Rotary Foundation Committee Chair, District 6010  
Jacqueline Coulibaly, District Grants Subcommittee Chair, District 9000  
Peter Webb, District Grants Subcommittee Chair, District 6010

Enclosures: Matching Grant Agreement Form, Payee Information Form, Contribution Form, Terms and Conditions of Matching Grant Award, Report Form, Humanitarian Programs Promotional Guide

MG0658101 Staff Initials WS

### 解釋

通知信函是告知您配合獎助金申請已經被核准正式通知。本信函寄到專案所在國以外的主要國際夥伴以及專案所在國的主要地主夥伴的主要專案聯絡人。此通知信函解釋您為了獲得獎助資金所必須採取的步驟，並包含有關附加在扶輪基金會釋出您的獎助資金或是為您的獎助金結案的任何條件的資訊。本信函的最後有一份內附資料的清單。夥伴雙方地區的地區總監、地區扶輪基金主委、以及地區獎助金小組委員會主委都會收到該通知信函的副本。

### 常見問題

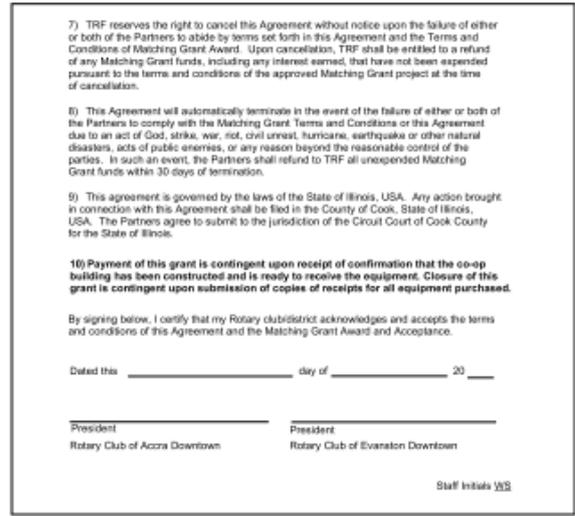
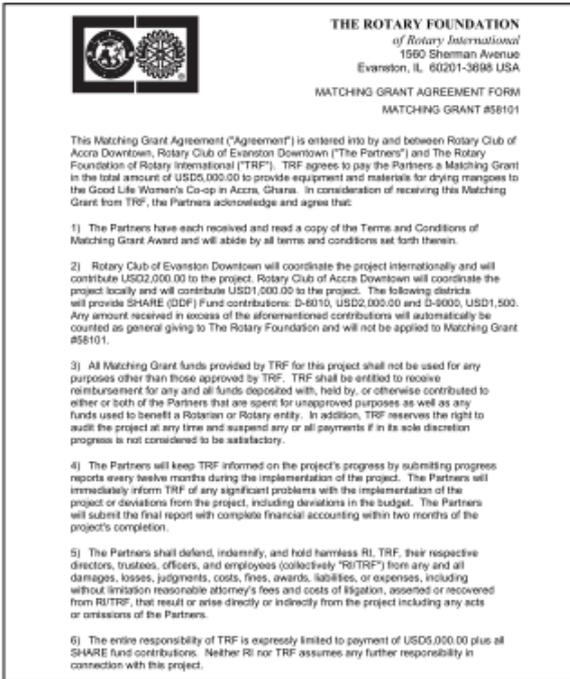
我在哪裡可以看到任何有關附加在扶輪基金會釋出我的獎助資金或是為我的獎助金結案的任何條件的資訊？

此資訊可以粗體字在本信函後面以及在同意書中被找到

### 您可記得...

- 仔細閱讀通知信函，並檢查有無任何在獎助金給付獲結案以前必須達成的附加條件？

配合獎助金同意書



解釋

配合獎助金同意書是一份法律文件，闡明夥伴扶輪社及/或地區以及 TRF 的責任。經由簽署本同意書，夥伴們同意本文件內所述之約定與條件，包括保管委員會所核准的本專案的籌款方式。

本同意書必須由下列個人簽署並送到 TRF，才會授權配合獎助金的付款：

1. 專案所在國的主要地主夥伴的扶輪社社長。如果主要地主夥伴是一個地區，地區獎助金小組委員會主委必須簽署本表單。

專案所在國以外的國際夥伴的扶輪社社長。如果國際地主夥伴是一個地區，地區獎助金小組委員會主委必須簽署本表單。

常見問題

我可以以傳真將簽署好的同意書傳副本送到 TRF，而不用郵寄的方式？

可以。它甚至可以掃描而以 e-mail 附加檔的方式寄出。

我們必須與我們的夥伴在同一份同意書上簽署，或是我們可以分別寄送簽署好的表單？

夥伴們不一定要在同一份同意書副本上簽署。夥伴雙方都收到同樣的表單，可以將它們簽署好的表單寄出。

如果另一個扶輪社或地區捐獻資金到本專案，但非主要贊助者，它們是否也需要簽署本同意書？

不必。只有主要夥伴扶輪社及/或地區需要簽署同意書，並對於專案的執行負有責任。

我的扶輪社社長及/或地區獎助金小主委員會主委已經簽署配合獎助金申請書。為何我們還要再(在同意書上)簽署一次？

保管委員會希望在獎助金支付以前確定夥伴們瞭解獎助金的約定與條件。收到簽署好的同意書是證明夥伴們瞭解並同意本約定與條件。此外，可能會有一些狀況，就是申請書是在上一個扶輪年度提出的。要求重新的授權簽署確保現任的職員們知道並參與本專案。

您可記得...

1. 詳細閱讀配合獎助金同意書
2. 在您的同意書副本上簽署並寄回 TRF？
3. 向您的夥伴扶輪社或地區查核以確定它已經寄出它的簽署好的同意書副本？

## 配合獎助金受款人資料表

**PAYEE INFORMATION FORM FOR MATCHING GRANT #58161**

Return this completed form along with the signed agreement to TRF for the release of funds.  
Please note the following:

- This form must be filled out completely or payment will be significantly delayed.
- The project bank account must be a Rotary club- or district-controlled account.
- Payments will not be made payable to an individual, cooperating organization, or beneficiary.
- Please provide the exact name on the account, which must be 35 characters or less.
- The form of payment will be based upon the geographic area. We recommend that all information necessary to facilitate sending funds via electronic funds transfer be provided.
- Please note that if payment is made via check, it will be sent directly to the project's Primary Contact.
- Payments that are misdirected due to incomplete or incorrect payee information will be the club or district's responsibility.

**SECTION A: Project Bank Account**

Bank Account Name:	
Complete Bank Account Number:	
<small>(Account number must include Bank code, Branch code, Account Number, Key code, &amp; Sort code, if applicable.)</small>	
Account Currency (USD or local currency - specify):	
Receiving Bank Name:	
Receiving Bank Address/City/State or Province/Postal Code/Country:	
Receiving Bank Telephone Number/Fax Number:	
<small>ABA Routing # (The ABA number is the routing code for U.S. based banks and is required for all electronic funds transfers within the U.S.)</small>	
<small>SWIFT BIC/Code (The SWIFT bank identification code (BIC) is the bank code required for all international transfers.)</small>	
<small>IBAN (The International Bank Account Number (IBAN) is required for all European Payments.)</small>	
<small>Other required bank code(s) (specify code):</small>	

**SECTION B: Intermediary/Correspondent Bank Information** - For international US\$ electronic funds transfers, you must include your bank's U.S. Intermediary/Correspondent bank information. Please contact your bank to obtain this information and enter below.

U.S. Intermediary/Correspondent Bank Name:	
U.S. Intermediary/Correspondent Bank Address/City/State:	
U.S. Intermediary/Correspondent Bank Phone/Fax:	
U.S. Intermediary/Correspondent Bank ABA Routing #:	

**SECTION C: Project Account Signatories**

Provide the names of two Rotarians who will be the signatories on the project account and responsible for receipt and disbursement of grant funds (They should be members of the primary club or district).

	Primary Signatory	Secondary Signatory
Name:		
Rotary ID:		
Title:		
Complete Address:		
Work Tel:		
Home Tel:		
Fax:		
Email:		

If you have questions about this form, please contact your program coordinator, William Smith, at Tel: (847) 866 3300, Fax: (847) 866 9799, OR E-mail: [william.smith@rotary.org](mailto:william.smith@rotary.org) Staff Inmate WS

### 常見問題

如果無法開設一個本專案的特別帳戶，付款可以以扶輪社帳戶的名義寄出嗎？

在有些國家要開設一個特別帳戶非常困難，TRF 可以將付款寄到扶輪社帳戶。

地主夥伴或國際夥伴何者應接受此資金？

該資金可以寄給地主夥伴或國際夥伴。夥伴們必須共同決定哪裡是該資金最合理的寄送處。

要多久的時間才能收到獎助金付款？

一旦付款的所有要求都已達成而且捐獻款已經收到，通常需要 2-4 週就可以收到這筆資金。

### 您可記得...

1. 填寫配合獎助金受款人資料表上所要求的各節？
2. 付款不會被寄給個人、受益人、或合作機構？
3. 向您的夥伴確認受款人資料表？

### 解釋

填寫好的配合獎助金受款人資料表提供 TRF 如何寄出配合獎助金付款的指示。上面有一些幫助資金的適當會計作業的規範。為加速您的付款的流程，請確認您有遵守這些規範。

- 為本專案開設特別的扶輪社或地區帳戶
- 請將您的帳戶名稱的長度限在 35 個字母以內，包括空格。

付款不會寄給一個人、受益人、或合作機構。

所有的獎助金都必須填寫 A 與 C 節。B 節則只有當付款是以美元電匯到美國國外時才必須填寫。

## 配合獎助金夥伴捐獻

### 解釋

扶輪社員在提交他們的配合獎助金捐獻時有兩個方案：

方案 1：將資金直接轉到專案帳戶。如果夥伴們選擇此方案，他們必須提供這些資金已經進入本專案帳戶的文件，像是銀行結單。如果選擇此方案的話夥伴們不會得到保羅哈里斯表揚。

方案 2：將資金轉到 TRF，可以用支票、電匯/銀行轉帳、或信用卡。務必要將獎助金案號包含在送給 TRF 的捐獻表中！如果選擇方案 2，扶輪社員須填寫捐獻表單(123-EN)並將它附於捐獻中。此表單可以從 RI 網站下載。

請記住，在獎助金被核准以前，不可以將捐獻提交 TRF。

### 常見問題

*為何(捐獻)資金要直接寄送到專案？*

TRF 處理捐款需要時間。將捐獻直接寄到專案可以加快付款流程。不過，對於直接寄到專案的捐獻，捐獻者不會得到保羅哈里斯表揚。

*如果有超過一個扶輪社或地區捐獻資金到本專案，他們是否全部要分別提交捐獻表單？*

不必。主要扶輪社可以從各個扶輪社或地區收集捐款並提交一張支票與捐獻表單。主要扶輪社可以在捐獻表單另附上一張列舉捐獻者以及他們各自捐獻額的清單。

*我可以就單一捐獻寄送多張支票嗎？*

可以，但如果總捐獻額以一張支票的話較單純也較快。

*我們地區要以 DDF/SHARE 捐獻。它需要捐獻表單嗎？*

不必。該表單只用於現金捐獻。

*我們如何收到我們的 DDF 捐獻呢？*

地區指定基金放在 TRF，一旦獎助金河準時，就自動從地區的帳戶扣帳。DDF 的捐獻會包含在獎助金的付款中。

*當提交捐款時要使用哪種匯率？*

捐獻必須使用配合獎助金同意書上的匯率上傳。

*國際夥伴可以以地主夥伴的名義提交捐款嗎？*

不可以。地主夥伴必須根據原始的獎助金籌款的安排提交他們自己的捐獻。

*如果獎助金被取消的話，我們的捐款會如何？*

一旦獎助資金被退回 TRF，扶輪社或地區的捐獻最常回歸扶輪社或地區的年度計劃基金帳戶。

### 您可記得...

1. 在所有的支票與捐獻表單中加上獎助金案號？
2. 如果使用方案 1 的話，附上資金已經直接進入本專案的證據？

**對於以分期方式的獎助金付款的支出計畫**

對於較大的專案或是那些必須要一段長時間來執行的專案，獎助資金會以分期方式付款。這些分期付款要根據一份由專案夥伴們提交的支出計畫來計算。支出計畫詳述在專案的每一期間中要支出多少錢。每一段期間所涵蓋的時間多久隨專案而異，但有一個很好的基本原則就是將一段期間的長短訂在 6-8 個月。下面就是一份支出計畫的樣本。

一旦一期的資金分期付款已經全部用完(不管是否已經超過 12 個月)而專案合夥人準備接受下一期付款時，他們必須提交一份進度報告。一旦該報告被審查並且被接受，TRF 會根據支出計畫釋出獎助資金的下一次分期付款。有些專案必須有持續不斷的獎助資金可用。在此情形，專案夥伴們可以在支出前分期 75% 的資金後就提交報告。

申請超過 US\$25,001 的扶輪社員必須在獎助金申請書中包含支出計畫。對於其他較大的專案，在核准同時，可能會有收到支出計畫才支付獎助金的附帶條件。此一附帶條件會在配合獎助金通知書中以及配合獎助金同意書中看到。

預算項目	第一期	第一期	第一期	專案預算總金額
總金額				

## 執行您的專案

在您的配合獎助金保管委員會核准後，您可以開始執行本專案。當您在從事您的專案時，請記得：

### 兩個專案委員會必須互相保持密切聯絡。

在執行一個專案中出現的問題大部分可以由夥伴雙方很容易就解決，尤其是如果他們有定期互相聯絡的話。使用電話、傳真、或 e-mail 來與您的夥伴保持聯絡。

### 確定在專案所在地有扶輪的識別標誌。

TRF 鼓勵在專案相關的設備或招牌上展示 RI 的齒輪標誌或 TRF 的標誌。顯眼的扶輪識別標誌可協助告知社區扶輪的活動。

### 對於所有支出仔細保存財務記錄

在維護您的專案帳簿時一定要使用可接受的會計程序。您所支出的金錢是由您的扶輪社或地區以及來自全世界的扶輪社員所捐獻，因此必須要將它視為神聖的託付。它是以真誠相信您會完成一項國際性服務專案的信心交給您。請記住，您必須在您的最終報告中包含一份完整的財務報告提供給 TRF。保留所有的收據與發票最少達 5 年。建立一套財產目錄系統以作為管控獎助金所購置的設備之用。

### 為您的專案照相。

TRF 要求您提供本專案的相片記錄。這些相片經常被用於扶輪雜誌、扶輪世界新聞、被 RI 公共關係部門、以及被 TRF 使用於公關或宣傳的目的。TRF 希望將您的成功與全世界其他扶輪社友分享。最佳的照片是展現行動中的扶輪社員與專案受益人。印刷的照片、幻燈片、或是高解析度的數位照片(至少 3 百萬畫素)都可為 TRF 接受。

### 定期向 TRF 提交報告

在專案進行期間必須至少每 12 個月提交一份進度報告。專案完成後兩個月內提交最終報告。請見下一章配合獎助金報告有更多的資訊。





如何撰寫一份配合獎助金報告

## 第 4 章

報告是配合獎助金整體流程中不可或缺的一部分。定期而且及時的提交報告有下列的目的：

- 慶祝您的專案的成功
- 將您的成就傳達給 TRF
- 展現出 TRF 的資金被妥善並且有效率的使用
- 提供 TRF 使用的透明度
- 符合地主與國際夥伴政府以及 TRF 法律上的要求
- 提供一個反映學習到的教訓的機會
- 維持扶輪社/地區在 TRF 的好名聲

進度報告必須在獎助金付款後在專案進行期間至少每 12 個月提交一次。在專案完成後兩個月

最終報告到期。在 RI 網站 [www.rotary.org](http://www.rotary.org) 可以下載配合獎助金報告表。

夥伴雙方都富有提交報告的責任。如果可能的話，報告應該共同製作。但若距離以及通訊的因素造成困難，夥伴們至少須互相分享報告的複本。

請注意在某些國家，當地政府另有制定報告的額外要求，對此扶輪社員必須遵守。如果您有任何有關這些要求的問題，請聯絡您的 RI 辦事處或人道獎助金協調人。

接下來幾頁將帶領您一步一步認識如何撰寫配合獎助金報告。

### 專案資訊

**Matching Grants**  
Report to The Rotary Foundation

The Rotary Foundation  
One Rotary Center  
1600 Sherman Ave.  
Evanston, IL 60201, USA  
Fax: 847-866-9759  
E-mail: [grants@rotaryintl.org](mailto:grants@rotaryintl.org)

The primary partner Rotary clubs/Districts must submit Progress Reports every twelve months during project implementation. The Final Report is due two months after completing the project.

**Project Information**

Matching Grant Number \_\_\_\_\_ Project Country \_\_\_\_\_

Progress report  Final report Reporting Period from \_\_\_\_\_ to \_\_\_\_\_

Host Partner Rotary Club: \_\_\_\_\_ District: \_\_\_\_\_

International Partner Rotary Club: \_\_\_\_\_ District: \_\_\_\_\_

**Project Narrative**

1. Briefly describe the project.

a. What were your original objectives?

b. What was actually accomplished?

c. When and where did the project take place, and who were the beneficiaries?

2. Scope change. If the project was changed, how and why was it changed?

### 解釋

配合獎助金報告書的第一節要求您提供下列資訊：

- 配合獎助金案號
- 專案所在國
- 表明本報告是進度報告或是最終報告
- 報告所涵蓋的期間
- 地主與國際夥伴扶輪社與地區

重要的是要包含報告日期以及表明本報告到底是進度報告或是最終報告。TRF 的職員在追蹤未來的報告是否到期時要靠這些資訊。

### 常見問題

*對於報告所涵蓋的期間我應該用什麼日期？*

初次報告所涵蓋的期間從收到獎助資金專案開始執行之日算起。報告的結束日期不可以遲於本期間開始後 12 個月。接下來的報告要緊接著前一次報告之後開始。

### 您可記得...

1. 表明本報告到底是進度報告或是最終報告？
2. 包含報告日期？

## 專案敘述

**Matching Grants**  
Report to The Rotary Foundation

The Rotary Foundation  
One Rotary Center  
1660 Sherman Ave.  
Evanston, IL 60201, USA  
Fax: 847-866-8799  
E-mail: grants@rotaryintl.org

The primary partner Rotary clubs/Districts must submit Progress Reports every twelve months during project implementation. The Final Report is due two months after completing the project.

**Project Information**

Matching Grant Number \_\_\_\_\_ Project Country \_\_\_\_\_

Progress report  Final report Reporting Period from \_\_\_\_\_ to \_\_\_\_\_

Host Partner Rotary Club: \_\_\_\_\_ District: \_\_\_\_\_

International Partner Rotary Club: \_\_\_\_\_ District: \_\_\_\_\_

**Project Narrative**

1. Briefly describe the project.

a. What were your original objectives?

b. What was actually accomplished?

c. When and where did the project take place, and who were the beneficiaries?

2. Scope change. If the project was changed, how and why was it changed?

1

### 常見問題

我為何須要列出原始目標？

比較本專案的原始目標與它的實際上的成就有助於衡量成功與否。它也提供機會去注意到任何從執行本專案中所學習到的教訓。

### 您可記得...

1. 解釋本專案的原始目標，如同獎助金申請書上所列舉的？
2. 詳細解釋本專案實際上的成就？
3. 對於任何範圍上的改變提供一個解釋？

### 解釋

在報告書的專案敘述這一節您要包含下列資訊：

- 原始的專案目標
- 專案實際上的成就
- 本專案是在何時何處進行的
- 受益人是誰
- 對於任何範圍的變更作解釋

在撰寫本節時，回去參考獎助金申請書會很有幫助。原來的目標是什麼？當描述專案實際上的成就時請記得要明確並且儘可能提供越多細節越好。

在執行本專案的過程中，如果您發現需要變更專案的範圍時，您必須在本節解釋此一變更以及其合理性。請隨時記得，所有的變更必須獲得 TRF 的核准！

## 扶輪社員的參與及監督

**Rotarian Involvement and Oversight**

3. How did Rotarians manage and oversee the project? \_\_\_\_\_

4. How many Rotarians from the host partner club participated in the project? \_\_\_\_\_

5. In what way did the host Rotarians participate in the project? Please list all non-financial involvement. \_\_\_\_\_

6. How many Rotarians from the international partner club participated in the project? \_\_\_\_\_

7. In what way did the international Rotarians participate in the project? Please list all non-financial involvement. \_\_\_\_\_

**Community Impact**

8. How many people benefited from the project? \_\_\_\_\_

9. What was the impact of the project on the beneficiaries? \_\_\_\_\_

10. What are the expected long-term community impacts of the project? \_\_\_\_\_

### 解釋

在本節您要解釋扶輪社員如何管理與監督本專案以及他們如何積極參與本專案。請記住地主與國際夥伴雙方都要積極參與本專案，像是訪視專案所在地、與受益者合作執行本專案、以及向當地媒體宣傳本專案。捐獻資金給本專案並不能構成積極的參與。對於本節內的問題提供詳細的回答。一定要包含參與本專案的地主與國際夥伴的扶輪社員人數。

### 常見問題

*扶輪社員管理與監督一件獎助金與扶輪社員的參與有何不同？*

扶輪社員監督與管理是指當執行專案時扶輪社員所做的監控，以確保保管委員會所訂的準則能夠遵守並且維持適當的管理工作。扶輪社員的參與是扶輪社員自願的參與專案的執行。

*國際夥伴住在專案所在地 8,000 哩外。他們真的被期待積極參與本專案嗎？*

是的。配合獎助金的目的就是當來自地主與國際夥伴國家的扶輪社員共同合作來執行本專案時能夠強化扶輪網絡。國際夥伴可以以許多方式參與本專案，即使他們住在距離專案所在地很遠的地方。國際夥伴可以協助規劃本專案、定期由地主夥伴得到最新資料，在國際夥伴的國家宣傳本專案，還有許許多多的方式。

### 您可記得...

1. 解釋扶輪社員如何監督與管理獎助資金？
2. 解釋地主與國際夥伴雙方扶輪社員如何積極參與本專案？
3. 列舉國際夥伴雙方參與本專案扶輪社員的人數？

## 對社區的影響

**Rotarian Involvement and Oversight**

3. How did Rotarians manage and oversee the project? \_\_\_\_\_

4. How many Rotarians from the host partner club participated in the project? \_\_\_\_\_

5. In what way did the host Rotarians participate in the project? Please list all non-financial involvement. \_\_\_\_\_

6. How many Rotarians from the international partner club participated in the project? \_\_\_\_\_

7. In what way did the international Rotarians participate in the project? Please list all non-financial involvement. \_\_\_\_\_

**Community Impact**

8. How many people benefited from the project? \_\_\_\_\_

9. What was the impact of the project on the beneficiaries? \_\_\_\_\_

10. What are the expected long-term community impacts of the project? \_\_\_\_\_

### 常見問題

*我如何知道本專案將會有什麼長期影響？*

在回答本問題時請運用您的最佳判斷。根據本專案對於受益社區的即時影響，您可以對於本專案的長期影響作一個依經驗的估計。

### 您可記得...

1. 指出由此專案受益的人數？
2. 解釋本專案對於受益者的影響？
3. 描述本專案對於對社區的長期影響？

### 解釋

配合獎助金報告書的本節要求您提供有關於本專案在方面對於受益社區影響的質與量方面的資訊。請指出由此專案受益的人數。您可以將直接與間接受益的人數都包括進去。

請務必清楚解釋本專案對於受益者的影響以及其預期對社區的長期效應。

## 財務報表

Financial Statement			
Currency Used: _____		Exchange Rate: _____ = 1 USD	
<b>11. Income</b>			
Sources of Income		Currency	Amount
1. TRF Matching Grant Award and Contributions			
2. Other Income (identify):			
3. Other Income (identify):			
4. Interest Income (if any):			
Total Income:			
<b>12. Expenses (add rows as needed)</b>			
Budget Items	Name of supplier	Currency	Amount
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
Total Expenses:			
13. Bank Statement - A bank statement that supports the above statement of income and expenses <i>must</i> be attached to this report.			
<b>Important - please read:</b>			
<input type="checkbox"/> For final reports, if there is less than US\$200 remaining, please spend it on eligible items. If there is more than US\$200 remaining, it <i>must</i> be returned to The Rotary Foundation. (Note: in India, government rules require that all unutilized funds be returned to the Rotary International South Asia Office.)			
<input type="checkbox"/> For grant awards over US\$25,000, attach an Independent Financial Review to each progress report and the final report.			
<input type="checkbox"/> Keep all original receipts for at least three years, or longer if required by local law. Do not send receipts to TRF unless requested by staff.			
<input type="checkbox"/> If your project involves a revolving loan fund you will need to visit the Rotary website at: <a href="http://www.rotary.org">www.rotary.org</a> to download the Report Supplement for Revolving Loan Grants.			
<b>14. Certifying Signature</b> - Either the Host or International Partner must certify the report. If the grant is club sponsored the <u>current club president</u> must certify the report and if the grant is district-sponsored the <u>district grants subcommittee chair</u> must certify the report.			
By signing this report, I confirm to the best of my knowledge that these Matching Grant funds were spent according to Trustee-approved guidelines and that all of the information contained herein is true and accurate. Original receipts for all expenses incurred will be kept on file for at least three years, or longer if required by local law, in case they are needed for auditing purposes.			
Print Name: _____	Signature: _____	Date: _____	
Rotary Title: _____	Club: _____	District: _____	

## 解釋

在配合獎助金報告書的本節的財務報表部份，您要清楚的列舉本專案的所有收入以及所有在本專案的過程中發生的支出。您要列出所使用的貨幣以及匯率。如果在本專案已經設定好 RI 的官方匯率，您在撰寫財務報表時須使用此匯率。在本專案過程中所採購的所有品項必須與供應商名稱、貨幣、以及數量清楚的列舉在本頁。

請記住，在所有報告中都要包含支持本財務報表的銀行結單！

在本報告上務必包含證明簽署。如果獎助金是扶輪社贊助的，必須由現任社長為本報告證明。如果獎助金是地區贊助的，則必須由地區獎助金小主委員會主委為本報告證明。地主與國際夥伴雙方都必須提供證明簽署。

如果獎助金涉及循環貸款或微型信貸，夥伴們必須另外撰寫並提交一份報告：循環貸款基金報告補充資料。進一步資訊請見 p43。

## 常見問題

*我必須隨報告附上收據嗎？*

不必。不過，從 TRF 將此獎助金結案日算起，您必須保存原始收據以及報告的複本至少 5 年。您當地的法律可能要求這些原始收據保存時間長於 5 年。收據必須建檔並且與收支報表能適當的交互比對。TRF 保留隨時索取收據副本或進行稽核的權利，這是為何保留原始收據是如此重要。

*我們已經完成執行本專案，但獎助資金有結餘。我們如何處理這些錢？*

如果您剩餘不到 US\$200 的獎助資金，您被授權將他們使用在與本專案相關的合格性項目。如果剩餘超過 \$200，這些資金必須歸還 TRF。有關將未用完的資金送往何處請聯絡您的人道獎助金協調人以得到指示。

*我必須隨本報告提交獨立財務審查嗎？*

對於金額 US\$25,001 以上的獎助金，必需隨每一次的進度及/或最終報告上傳獨立財務審查（進一步資訊請見 p42）。

## 您可記得...

1. 列出所使用的貨幣以及匯率？
2. 提供詳細的列舉本專案的所有收入以及所有發生的支出？
3. 附上支持本財務報表的銀行結單？

額外資訊

In our effort to improve our grant program, we'd appreciate your feedback on the following questions:

**A. Rotary Impact – select all that apply**

Our club or district's international Rotary connections are stronger as a result of this project.

Club membership has increased as a result of this project.

Visibility of Rotary in our community has increased.

Our club's awareness of the needs in our community has increased.

Volunteer activity in our club or district has expanded.

Our club or district is more active in pursuing Foundation grants and Rotary programs.

Awareness of the needs in our community has increased among Rotarians in other countries.

Participation in this Matching Grant has not changed our club or district in any significant way.

**B. Project Sustainability – select all that apply**

The project will continue to function without Foundation funds.

Equipment purchased with grant funds is being maintained with local materials and expertise.

If training was a component of the project, trainees are using their knowledge and skills.

This project has provided community members with the skills, knowledge, or institutions that will allow them to help themselves.

The community has initiated additional projects related to the same or similar problems.

The project has not been sustainable.

**C. Suggestions**

Given your experience, do you have suggestions to improve the Matching Grants program?

If your project clearly demonstrates Rotarian involvement and is worthy of publication, please complete an RI Newstip Form, available on the RI website at [http://www.rotary.org/1166140201/downloadcenter/cdfs/riq\\_newstip.pdf](http://www.rotary.org/1166140201/downloadcenter/cdfs/riq_newstip.pdf)

**Report Checklist**

**Does your report include the following?**

Time period of reporting

How and what the project accomplished

Rotarian participation, oversight and management

Rotary impact

Itemized report of income and expenses

A bank statement

Certifying signature

Independent Financial Review for grant awards of US\$25,001 or more

**Have you done the following?**

Made copies of the report for both the host and international partner

Returned surplus funds over US\$200 (except in India where all unutilized funds must be returned)

Made a file to store the report and receipt copies for three years or longer if required by local law

4

常見問題

我必須隨本報告寄送照片嗎？

我們鼓勵再進度報告與最終報告都提交專案執行以及受益人的動態相片。

我如何公開我的專案？

請見包含在配合獎助金通知信函內的人道專案宣傳指南可以得到建議。此一指南也可以從 RI 網站下載。如果您有關於您專案的好故事要告訴人，請將它與 TRF 分享，TRF 一直都在尋找有關獎助金專案的令人興奮的新故事。

您可記得...

1. 提供有關本專案的永續性以及其對福輪的影響？
2. 提供任何可以改善配合獎助金計劃的建議？
3. 勵填寫報告核對清單以確認本報告完備？

解釋

在配合獎助金報告書的本節是選擇性的。不過，我們鼓勵您撰寫本節，因為您的回饋對於 TRF 是很有價值的。

如果您覺得您的專案清楚的顯示扶輪社員的參與，並且直得發佈，請提交一份 RI 新聞情報(RI Newstip)表格，此表格可以在 RI 網站找到。

您也被鼓勵填寫報告核對清單。本清單提供一個協助您完成本報告的工具。





## 附錄 A：扶輪基金會的政策

### 人口成長與發展

扶輪基金會(TRF)支持國際扶輪的計畫，包括其有關 **RI 對於人口成長與發展的聲明**(於 1999 年 8 月核准)的目的與目標。

人道獎助金企劃案如果關係到家庭健康照護、足夠的營養、教育的改善、以及其他執行負責任的小孩出生間隔以及家庭計畫所需的工具，TRF 會給予有利的考慮。

務必注意，不管源自哪個地理區域，所有獎助金都會被以相同的態度來考量。需要時，合格的扶輪義工會被諮詢並要求去監視某些專案。這類的義工會協助確保 TRF 在與人口議題相關的專案上保持它的原則以及適當的平衡。

### Eligible Expenditures

醫療支出	較育與訓練
<ul style="list-style-type: none"><li>產前藥物/維他命</li><li>分娩用藥</li><li>新生兒篩檢</li><li>協助分娩的外科儀器</li><li>產前篩檢</li><li>超音波儀器 (只要試用於診斷與治療病人)</li></ul>	<ul style="list-style-type: none"><li>公共衛生教育</li><li>家庭計畫訓練</li><li>有關性傳染疾病的資訊</li><li>社區衛生訓練</li><li>平衡的飲食以及對營養的認識</li></ul>

### 扶輪名稱與徽章使用規範

下列有關扶輪名稱與徽章使用的規範。當為您的專案命名以及在您可能設計的任何印刷品中請遵守這些規範。

#### A. 扶輪名稱

1. RI 理事會已經決定，任何對“扶輪”名稱的使用，如未有進一步的修飾語，像是扶輪社或是扶輪地區的名稱的話，就是在指 RI 這國際性協會。
2. 非由 RI 完全控制的新專案或是計畫名稱，當使用“扶輪”名稱時，必須加上參與扶輪社或地區的名稱，並且不可以使用“國際”此名稱。
3. 如果使用“扶輪”與“基金會”這些字眼時，它們不可以同時出現，而必須另外加上識別資訊，像是參與的扶輪社或地區的名稱，加以隔開。
4. 已經在進行中非由 RI 完全控制而又不符合本規範的計畫必須重新命名以另加上加識別資訊(也就是當使用“扶輪”此名稱時必須包含參與的扶輪社或地區的名稱)。
5. 任何專案的命名如果不符合本規範，必須經 RI 理事會特別核准。

#### B. The Rotary Emblem:

1. 扶輪徽章，如同扶輪名稱，代表 RI 此一國際性協會。
2. 當扶輪徽章使用於非由 RI 完全控制的專案、計畫、或是計畫時，除了本徽章外，還必須加上參與的扶輪社或地區的名稱：必須緊臨此徽章出現；而且其大小要與徽章同樣顯著。

3. 任何對於本扶輪徽章的複製必須符合 RI 正確的徽章規格。(請見 2007 年版*程序手冊*第 17 章。有一些馬上可以上鏡頭的美工設計可以透過您的扶輪社與地區支援代表取得。) 對於扶輪徽章不准許加以變更、修飾、或遮掩。徽章必須準確的複製，並且一定要以其完整狀態出現。

國際扶輪細則不允許 RI 徽章與另一個機構的徽章或識別標誌共同使用(“將此名稱、徽章、領章、或其他佩章與其他名稱或徽章結合使用不被 RI 承認。” *RI 細則第 18.020 條*)

## 其他扶輪基金會政策

### 對於有過期的進度或最終報告退回申請書

只有在雙方夥伴社都已經為他們尚未結案的獎助金專案提交報告，扶輪基金會(TRF)才會處理新的申請書。這意味如果國際或地主夥伴有一方有過期報告，任何申請書都會不經處理就被退件。一旦所有的報告的要求都被履行，還是歡迎夥伴們重新提出他們的申請書。

保管委員會要求注意他們對於扶輪基金會管理工作政策的承諾。有效的管理工作包括符合所有的報告的要求。進度報告要求自獎助金付款時開始至少每 12 個月一次，最終報則要求專案完成後 2 個月內提交。這些報告必須清楚顯示雙方夥伴在規劃與執行他們的專案上扮演相當重要的角色。配合獎助金報告書的複本可以從 RI 網站 [www.rotary.org](http://www.rotary.org) 下載。

## 脫水食品

涉及脫水食品的獎助金的夥伴們必須證實有足夠可攜帶的水來成功的執行本專案才會進行付款。

## 飲水安全

在世界上某些地方，地下水層被砷污染。基於此理由，涉及供水專案的獎助金必須提出供水未受污染的證明才會進行付款。

## 付款的附加條件

- 在某些個案，要容納獎助金採購品向的建築結構尚未完成。除非該結構已經完成，否則不會進行獎助金的付款。
- 請注意專案如果也接受加拿大扶輪國際發展委員會(CRCID)資助的話，除非 TRF 收到 CRCID 已經核准扶輪社員向該機構的獎助金申請的證明，否則不會付款。

## 附錄 B：社區需求評估

配合獎助金申請如果超過 US\$25,001 以上時(競爭性獎助金)必須撰寫一份社區需求評估。在評估當中所收集的資訊必須包含在社區需求評估表內並且隨獎助金申請書上傳。該表格可於 RI 網站下載。下列資訊將可協助您進行社區需求評估。

### 常見問題

#### 何謂社區需求評估？

它是收集有關一個社區的意見，需求，以及資產等資訊，以決定哪種專案可以符合該社區的需求的方法。

#### 社區需求評估如何進行？

貴扶輪社必須先以任命一個評估委員會開始。此委員會須包括有見識，熟悉本社區，並且能夠付出評估社區需求所需的時間與資源的輪社員。在進行評估時，委員會要與社區領導人以及整個社區成員共同合作。下列是社區需求評估的一些工具：

- **訪談**—從那些在職務上瞭解社區需求的社區成員收集資訊。這些人可以是社區領導人，專業人士，或是其他與特定機構或機關有密切關係的個人。
- **公共論壇**—將多方面的社區成員聚集於公共集會以透過小組討論來收集資訊。
- **焦點團體**—從一小群針對性的社區成員獲得意見。
- **調查**—利用正式的調查或問卷以從廣大的社區成員收集資訊。

- **二次資料分析**—檢視並分析收集到的有關社區議題與需求的資料。
- **資產地圖製作**—收集有關社區現有資產與資源的資訊。

有些因素會影響到所選擇的評估方式，包括時間、費用、目標聽眾、以及可用的人力。理想上，區需求評估應包含幾種工具的組合。

#### 進行一項社區需求評估牽涉到哪些步驟？

基本步驟如下：

- 組織一個社區需求評估委員會
- 決定接受評估的社區
- 選擇一或數個社區需求評估工具
- 設計一套評估的計畫(誰、什麼、何時、何地、如何)
- 利用所選擇的工具執行評估
- 分析結果
- 製作報告詳述結果
- 利用該報告來決定扶輪社如何介入

#### 我們應該收及哪類的資訊？

這要視個別社區以及其特定需求而異。不過，下列資訊在所有的社區需求評估都必須收集：

- 對該社區以及可應用的統計資料加以描述
- 由社區領導人以及成員所確認的需求
- 當前為滿足社區需求所採取的行動
- 為協助滿足社區需求可利用的當地資源
- 有哪些專案的機會
- 專案會遇到哪些挑戰
- 社區在本專案的參與
- 社區長期維持本專案的能力

---

*一旦這些資訊都收集好，要如何處理呢？*

這些資訊必須分析，匯整成一份報告，並與扶輪社理事會、專案的所有夥伴們、以及那些對於特別熱心提供資訊以供評估的社區成員分享。爲了協助扶輪社員，TRF 已經製作一份樣板以供紀錄評估當中收集到的資訊。此表格可以由 RI 網站下載，對於獎助金申請超過 US\$25,001 以上者必須填寫並且附於配合獎助金申請書。

*社區需求評估如何協助扶輪社選擇專案？*

根據評估當中發現的需求，扶輪社可以選擇他們所希望參與的領域。一件專案的選擇必需取決於社區的需求以及扶輪社與它的夥伴所能得到的資源。

## 附錄 C：獨立財務審查

所有的獎助金接受者被鼓勵提供一份獨立財務審查。對於 US\$25,001 以上的獎助金，或是只要被明白要求時，就需要一份獨立財務審查。獨立財務審查表可以從 RI 網站下載。

獨立財務審查必須由適當的有照，特許，或合格，並且與受審查的專案無直接關聯的會計師或會計師事務所執行。對於這種獨立會計師事務所或會計師的任命必須由資金寄到的地區的總監為之。扶輪基金會保留任命獨立的年度審查者的權利。

對於獨立的年度審查的程序，一致的意見認為必須包含：

- 檢查並證明所有專案資金的開戶餘額與結清餘額
- 確定本專案所收到的資金是否照預期的目的開支，如果否的話，為何不
- 檢查帳戶內所有收到與支出的資金以確定他們是否按照標準商業慣例維護，包括一套標準的帳簿，按日記錄所有收據與支付款、金額、用途，以及確定資金是以合乎獎助金約定與條件的方式支出
- 確定是否有保存全部資產的清單
- 對於支出加以檢視，以確定資金是按照預期的目的開支，維護適當的記錄，以及有一套管控支出的系統存在，也就是，是否每一個帳戶多至少有兩位簽署人；對於所有超過 US\$25 的支出保存收據；有確定採購程序(適合的話，鼓勵競標的方式)；以及所有的專案活動，包括資金的換算，都要符合當地的法律與規定

- 確定資金是否以及時的方式核帳並證明所有專案帳戶的開戶餘額與結清餘額以及銀行結單

獨立年度審查必須在收到第一筆付款後不遲於 15 個月提交扶輪基金會，並且在那以後每 12 個月一次，直到專案夥伴們被通知本專案的獎助金期間已經正式完成了。

夥伴扶輪社或地區在整個獎助金執行期間要保存詳細、正確、以及完整的財務記錄，並且在獎助金結案日算起要保存 5 年。這些財務記錄包括收據複本、已銷帳的支票、發票等。

對於所有獎助金的獨立的年度審查的責任歸於主要夥伴，其費用可以由所有贊助的扶輪社，扶輪地區，或其他獎助金受獎人共同分攤。對於 US\$25,001 以上的獎助金，如果這些獎助金受獎人不能支付這些開銷，他們可以在原始的申請書申請在此專案進行期間每年最高 US\$500 來作此用途。

## 附錄 D：循環貸款基金/微型信貸

循環貸款專案，又稱為微型信貸或鄉村銀行，組織低收入民眾，通常是女性，來借金錢、動物、或設備以促成小型經濟性自助式企業。扶輪使用循環貸款此名詞是因為其資金能繼續循環；資金貸款給受益者，償還，再貸出去，希望能循環不息。涉及設立循環貸款基金的獎助金專案必須包含訓練，不是只有在商業原則的訓練，還有職業的訓練。

對於每一個信貸群最多可以使用 US\$10,000 的獎助資金。一件獎助金可以支援多個信貸群。一個信貸群，也叫做鄉村銀行，包含 10 到 30 人的借貸者，通常是女性，接受最初步的儲蓄、信用、以及企業精神的訓練，他們可以交叉擔保別人的貸款，以確保對本基金的償還。如果扶輪社的專案贊助者決定要停止本循環貸款基金，貸款的本金要歸還給 TRF。

對於循環貸款或微型信貸專案的配合獎助金申請必需包括標準的配合獎助金申請書及循環貸款基金補充表格以及循環貸款基金信貸群計劃書(每一信貸群一份)。這些表格可於 RI 網站下載。

在接受保管委員會審核以前，所有循環貸款基金或微型信貸獎助金的申請書要先由一位**人道獎助金計劃技術顧問本部**進行初步審核。此顧問本部是一群具有相關經驗的扶輪社員，由保管委員會主委所任命，負責審核申請案的技術的妥當性以及長期存活性。

### 常見問題

*我們可以利用一個合作機構來協助執行我們的循環貸款專案嗎？*

合作機構可以協助扶輪社與地區進行微型信貸與循環貸款基金，但是對本專案的監督與管控必須歸於扶輪社或地區。除非合作機構能展現它們符合 TRF 要求的能力並且扶輪社員有顯著的參與這些活動，否則 TRF 不會對於任何涉及合作機構的微型信貸與循環貸款基金的獎助金申請案做考慮。

*對於循環貸款基金或微型信貸專案有沒有額外的報告的要求？*

有的。除了撰寫配合獎助金報告以外，扶輪社員必須撰寫**循環貸款獎助金報告補充**，可於 RI 網站下載。

*我們可以利用獎助資金來支付行政管理支出嗎？*

根據標準人道獎助金政策與規範，TRF 獎助資金可以用於扶輪社與地區支持循環貸款專案的開辦費，直到該貸款基金能夠自我維持。此外，由來自 TRF 的循環貸款本金所產生的利息與收費可以用於進行中的支持循環貸款專案的行政管理支出。

*我們可以使用這些資金來位銀行貸款作保嗎？*

根據保管委員會決議，TRF 不能資助貸款保證系統。

附錄 E：配合獎助金申請書樣本



# Matching Grant Application The Rotary Foundation (TRF)

1

## PROJECT DESCRIPTION

**Explanation:** Matching Grants support the humanitarian service projects of Rotary clubs and districts. In this section, describe in detail the humanitarian need your project will address, the intent of the project, how the project will be implemented, and how Rotarians will be directly involved in the project. Involvement is required of both the host and international partners.

Please provide the name of the project site, the city or village, state or province, and country. List multiple locations, if applicable.

Project site Good Life Women's Co-op  
 City/Village Accra  
 State/Province \_\_\_\_\_  
 Country Ghana

Describe the project and the problem or need it will address, including the intended beneficiaries and how the project will benefit the community in need. Provide the estimated length of time needed to complete the project.

Through this project, we will provide equipment and materials for drying mangoes to the Good Life Women's Co-op in Accra, Ghana. There are approximately 50 women who belong to the co-op. These women are quite poor and have large families that they must support. Outside of their involvement in the co-op, these women have no regular source of income. The women will be trained in the use and maintenance of the equipment. The host Rotarians will work with the co-op members to develop local markets for the sale of the mangoes. Once the mangoes are dried and packaged, they will be sold at kiosks in markets throughout Accra. All proceeds will benefit the co-op members. The women will be able to use the income to support their families, paying for school fees, clothing and food. Once the grant is approved, we anticipate that it will take approximately 2 months to order and receive the equipment. It will take another couple of weeks to install the equipment and train the co-op members.

Describe how the benefiting community will maintain this project after grant funding has been fully expended.

Because the women will be trained in how to maintain the equipment, they will be able to maintain the project with no outside technical assistance. The proceeds from the sale of the mangoes will return to the co-op, the majority of which will transfer directly to the members. The remaining proceeds will be used to purchase the supplies needed to continue the project. The co-op members will continually work to develop new markets for the sale of the mangoes, ensuring ongoing income.

Describe specific activities of the host and international partners in implementing the project. What will the Rotarians who are members of the partner clubs do during the project? Please note that financial support is not considered active involvement. (See the Matching Grant application instructions for suggestions.)

The host club has worked with the women's co-op to identify the equipment needed for drying mangoes. They will assist in purchasing and installing the equipment. They will also assist the co-op members to develop local markets for selling the dried mangoes. The international club will assist with project planning and will maintain weekly communication with the host sponsor. Communication will be in the form of e-mails and regular reports. The international club also plans to visit the project. Both the host and international clubs will promote the project in their communities in order to broaden the market for selling the dried mangoes.

2

**HOST PARTNER**

**Explanation:** The host partner is the club or district in the project country. A committee of at least **three** Rotarians must be established to oversee the project. The primary project contact must be a member of the primary club identified below. The project committee must be composed of members of the sponsor Rotary clubs for club-sponsored projects or district for district-sponsored projects. The committee members must be committed for the duration of the grant process. Please provide the primary address for all committee members, as all Rotary information will be sent to this address. It is highly recommended that the primary contact (who receives all information from TRF) have an e-mail address to expedite communication.

**Primary Club/District**

Club Accra Downtown Club ID number (if known) 6576  
 District 9000 Country Ghana

**Primary Contact:**

Name Sam Wilson Member ID 2310459  
 Club Accra Downtown  
 Rotary position President  
 Address 1234 Accra Way  
 City Accra  
 State/Province \_\_\_\_\_ Postal code \_\_\_\_\_ Country Ghana  
 E-mail swilson@email.com  
 Home phone 233 21 555 555 Office phone 233 21 555 554 Fax 233 21 555 556

**Project Contact #2:**

Name Francis Appiah Member ID 7683829  
 Club Accra Downtown  
 Rotary position Treasurer  
 Address P.O. Box 85  
 City Accra  
 State/Province \_\_\_\_\_ Postal code \_\_\_\_\_ Country Ghana  
 E-mail fappiah@email.com  
 Home phone 233 21 555 545 Office phone 233 21 555 544 Fax 233 21 555 546

**Project Contact #3:**

Name Robert Owusu Member ID 29384938  
 Club Accra Downtown  
 Rotary position Past President  
 Address 3000 Ghana Avenue  
 City Accra  
 State/Province \_\_\_\_\_ Postal code \_\_\_\_\_ Country Ghana  
 E-mail rowusu@email.com  
 Home phone 233 21 555 535 Office phone 233 21 555 534 Fax 233 21 555 546

**INTERNATIONAL PARTNER**

**Explanation:** The international partner is the club or district outside the project country. A committee of at least **three** Rotarians must be established to oversee the project. The primary project contact must be a member of the primary club identified below. The project committee must be composed of members of the sponsor Rotary clubs for club-sponsored projects or district for district-sponsored projects. The committee members must be committed for the duration of the grant process. Please provide the primary address for all committee members, as all Rotary information will be sent to this address. It is highly recommended that the primary contact (who receives all information from TRF) have an e-mail address to expedite communication.

**Primary Club/District**

Club Evanston Downtown Club ID number (if known) 4235  
 District 6010 Country USA

**Primary Contact:**

Name John Doe Member ID 7382729  
 Club Evanston Downtown  
 Rotary position Treasurer  
 Address 300 Main Street  
 City Evanston  
 State/Province IL Postal code 60202 Country USA  
 E-mail jdoe@email.com  
 Home phone 847 555 5555 Office phone 847 555 5554 Fax 847 555 5556

**Project Contact #2:**

Name Mary Smith Member ID 2718738  
 Club Evanston Downtown  
 Rotary position President  
 Address 1200 Central Street  
 City Evanston  
 State/Province IL Postal code 60201 Country USA  
 E-mail msmith@email.com  
 Home phone 847 555 5545 Office phone 847 555 5544 Fax 847 555 5546

**Project Contact #3:**

Name Thomas Johnson Member ID 2837281  
 Club Evanston Downtown  
 Rotary position Club Member  
 Address 3050 Central Park Avenue  
 City Evanston  
 State/Province IL Postal code 60201 Country USA  
 E-mail tjohnson@email.com  
 Home phone 847 555 5535 Office phone 847 555 5534 Fax 847 555 5536



**PROJECT FINANCING**

**Explanation:** Clearly list all financing in U.S. dollars noting which funds will be contributed in cash and which will be contributed from District Designated Funds (DDF). Use of DDF must be authorized by the district Rotary Foundation committee chair. TRF matches US\$0.50 for every \$1 cash contribution and \$1 for every \$1 contribution from DDF. The primary host club or district must provide at least \$100.

**NOTE:** No funds should be sent to TRF prior to official Trustee approval. Upon approval, a letter will be sent to the sponsors notifying them of approval and providing detailed instructions on how and where to submit their contributions.

<b>Host Rotary clubs or districts inside the project country</b> (The primary host club or district must provide at least US\$100.)	<b>Cash (US\$)</b>	<b>DDF (US\$)</b>	<b>DRFC Chair (Print Name)</b>	<b>DRFC Chair Authorization</b>
RC Accra Downtown	\$1,000			
District 9000		\$1,500	Nana Akua Ofori	<i>Nana Akua Ofori</i>
<b>International Rotary clubs or districts outside the project country</b>	<b>Cash (US\$)</b>	<b>DDF (US\$)</b>	<b>DRFC Chair (Print Name)</b>	<b>DRFC Chair Authorization</b>
RC Evanston Downtown	\$2,000			
District 6010		\$2,000	Matthew Stanford	<i>Matthew Stanford</i>
<b>Subtotals, Cash and DDF</b>	\$3,000	\$3,500		
<b>TOTAL Cosponsor contributions</b>		\$6,500		
<b>Total funds requested from TRF</b> (must be at least US\$5,000)		\$5,000		
<b>Additional outside funding</b> (not matched by, or forwarded to, TRF)		0		
<b>Total project financing</b> (must equal budget on page 4)		\$11,500		

6

## PROJECT PLANNING

**Explanation:** Before an application is submitted to TRF, project partners should discuss various planning details. The questions below are a guide to aid project planning. Note that a Rotary club/district or Rotarian may not own anything purchased with grant funds.

Identify who will own equipment and maintain, operate, and secure items purchased with grant funds. (A Rotary club or Rotarian cannot own equipment.)

The equipment will be owned, maintained, operated and secured by the Good Life Women's Co-op.

Will training in use and maintenance of technical equipment be provided? If so, who will provide training?

The members of the co-op will be trained in use and maintenance of the equipment. This training will be provided by the equipment supplier.

Is software necessary to operate any items? If so, has software been provided?

No software is necessary to operate the equipment.

Indicate what arrangements have been made for customs clearance if items will be purchased and shipped from outside the project country.

The equipment will be purchased locally, so there is no need to make arrangements for customs clearance.

Provision of plumbing and electrification to structures where people live or work cannot be purchased with grant funds and must be funded with other sources. Have the sponsor clubs/districts planned and agreed to fund plumbing or electrification for equipment and appliances in existing buildings (hospitals, schools, libraries, orphanages, etc.)?

Plumbing and electrification are already in place in the co-op building.

## COMPETITIVE GRANTS

**Explanation:** Competitive grants are grants requesting US\$25,001 or above from TRF. They are reviewed twice a year at the October and April Trustees' meetings.

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

- Involves the benefiting community
- Is viable and will be maintained by the benefiting community after grant funds have been expended

Please refer to *The Guide to Matching Grants* (144-EN) and the RI Web site ([www.rotary.org](http://www.rotary.org)) for additional information.

**AUTHORIZATIONS**

**Explanation:** Authorizations ensure that both partners are aware of, and interested in, pursuing the described project. By signing below, the current club presidents for club-sponsored projects and current district grants subcommittee chairs for district-sponsored projects, as well as the committee members, agree to the criteria listed and affirm their support of the project.

All Rotary clubs, districts, and Rotarians involved in this project are responsible to The Rotary Foundation (TRF) for the conduct of the project and its subsequent reporting. The signatures of all involved parties confirm that they understand and accept responsibility for the project. Parties may either sign this page or submit a separate letter of commitment.

By signing below, we agree to the following:

- All information contained in this application is, to the best of our knowledge, true and accurate, and we intend to implement the project as presented in this application.
- The club/district agrees to undertake this project as an activity of the club/district.
- We ensure all cash contributions (as detailed in Project Financing) will be forwarded to TRF or directly to the project account after Trustee approval of the grant.
- RI and TRF may use information contained in this application to promote the project by various means such as *The Rotarian*, the RI international convention, *RVM: The Rotarian Video Magazine*, etc.
- The partners agree to share information on best practices when asked, and TRF may provide partners' contact information to other Rotarians who may wish advice on implementing similar projects.
- To the best of my knowledge and belief, except as disclosed herewith, neither I nor any person with whom I have or had a personal or business relationship is engaged, or intends to engage, in benefiting from TRF grant funds or has any interest that may represent a potential competing or conflicting interest. A conflict of interest is defined as a situation in which a Rotarian, in relationship to an outside organization, is in a position to influence the spending of TRF grant funds, or influence decisions in ways that could lead directly or indirectly to financial gain for the Rotarian, a business colleague, or his or her family, or give improper advantage to others to the detriment of TRF. (NOTE: Any and all exceptions must be explained in an attached statement.)

Host Partner		International Partner	
<input checked="" type="checkbox"/> Club president (club-sponsored)		<input checked="" type="checkbox"/> Club president (club-sponsored)	
<input type="checkbox"/> District grants subcommittee chair (district-sponsored)		<input type="checkbox"/> District grants subcommittee chair (district-sponsored)	
Name	Sam Wilson	Name	Mary Smith
Title	President	Title	President
Rotary Club	Accra Downtown	Rotary Club	Evanston Downtown
District #	9000	District #	6010
Signature	<i>Sam Wilson</i>	Signature	<i>Mary Smith</i>
Date	1 July 2006	Date	15 July 2006

Primary Contact		Primary Contact	
Name	Sam Wilson	Name	John Doe
Signature	<i>Sam Wilson</i>	Signature	<i>John Doe</i>
Date	1 July 2006	Date	15 July 2006

Project Contact #2		Project Contact #2	
Name	Francis Appiah	Name	Mary Smith
Signature	<i>Francis Appiah</i>	Signature	<i>Mary Smith</i>
Date	1 July 2006	Date	15 July 2006

Project Contact #3		Project Contact #3	
Name	Robert Owusu	Name	Thomas Johnson
Signature	<i>Robert Owusu</i>	Signature	<i>Thomas Johnson</i>
Date	1 July 2006	Date	15 July 2006

8

**COOPERATING ORGANIZATION**

**Explanation:** A *cooperating organization* is an organization that is directly involved in the implementation of the project, offering technical expertise and project coordination. A *benefiting entity* is the recipient of goods or services and is not considered a cooperating organization.

If this project involves a cooperating organization (neither a Rotary club nor the beneficiary of the project), provide the following:

Name of organization N/A

Street address \_\_\_\_\_

City, State/Province \_\_\_\_\_ Postal code \_\_\_\_\_ Country \_\_\_\_\_

Office phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_ Web address \_\_\_\_\_

In addition to the above, the following must be attached:

- Letter of participation from cooperating organization that specifically states:
  - Its responsibilities and how it will interact with Rotarians
  - The organization's agreement to cooperate in any financial review of the project
- A letter of endorsement from the host partner confirming that the cooperating organization works within that country's laws

**FINAL REPORT**

**Explanation:** Although both partners are responsible for completing progress and final reports, the Trustees require that one partner take primary responsibility for submitting the final report to TRF. It is recommended that the club or district receiving the funds should take primary responsibility.

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

Print name Sam Wilson Signature Sam Wilson

Rotary club Accra Downtown District 9000

**DISTRICT GRANTS SUBCOMMITTEE CHAIR REVIEW**

**Explanation:** The Trustees require that the district grants subcommittee chair (DGSC) from either the host or international sponsor district certifies 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, meets all TRF guidelines, and is eligible for funding."

Print name of DGSC Elizabeth Kpodo Signature Elizabeth Kpodo

District 9000 Date 5 July 2006



**COMPLETION CHECKLIST**

Before submitting your Matching Grant application, please take a moment to review this checklist. If you have any questions or concerns, please contact the Humanitarian Grant Coordinator for the project location.

- Does the project meet **all** grant policies and guidelines (see *The Guide to Matching Grants* [144-EN] or the RI Web site at www.rotary.org)?
- Does the project description clearly state how the project will assist those in need?
- Are the activities of the host and international partners clearly explained? Will the Rotarians be actively involved in the project?
- Have both the host and international partners created committees to oversee the project? Are these individuals correctly listed on the application with their complete contact information?
- Is a detailed, itemized budget included in the application?
- Are all partner contributions listed in the application, noting which contributions will be cash and which will be DDF?
- Has the DRFC chair provided his/her signature authorizing the use of District Designated Funds?
- Have the club presidents or district grants subcommittee chairs from the host and international partner provided their authorizing signatures?
- Have all six committee members provided their authorizing signatures?
- If a cooperating organization is involved, are the following letters included with the application:
  - Letter from the organization specifically stating its responsibilities, how it will interact with Rotarians, and agreeing to cooperate in any financial review of the project
  - Letter of endorsement from the host partner confirming that the cooperating organization is reputable and works within the laws of that country
- If the project involves a revolving loan or microcredit, is the Revolving Loan Fund Supplement and Credit Group Plan included?
- If the grant request is US\$25,001 or more, is a community needs assessment attached?
- Has the district grants subcommittee chair from either the host or international partner certified the application as complete and eligible?
- Is there a minimum of nine authorizing signatures included in the application?
- Have the partners made copies of all documents for their files prior to submitting them to TRF?

**Complete applications should be sent to:**



Humanitarian Grants Program  
 The Rotary Foundation  
 One Rotary Center  
 1560 Sherman Avenue  
 Evanston, IL 60201-3698 USA  
 Fax: 847-866-9759  
 E-mail: grants@rotary.org

## 附錄 F：配合獎助金報告書樣本


**Matching Grants**  
 Report to The Rotary Foundation

*The Rotary Foundation*  
*One Rotary Center*  
*1560 Sherman Ave.*  
*Evanston, IL 60201, USA*  
 Fax: 847-866-9759  
 E-mail: grants@rotary.org

The primary partner Rotary clubs/districts must submit Progress Reports every twelve months during project implementation. The Final Report is due two months after completing the project.

**Project Information**

Matching Grant Number 42361 Project Country Ghana

Progress report  Final report Reporting Period from 1 October 2003 to 1 October 2004

Host Partner Rotary Club: Accra Downtown District: 9000

International Partner Rotary Club: Evanston Downtown District: 6010

**Project Narrative**

1. Briefly describe the project.

a. What were your original objectives?

The original objectives were to provide mango-drying equipment to the Good Life Women's Co-op in Accra, Ghana. In addition to providing the equipment, the original objectives included providing training for the members of the co-op on how to use the equipment.

b. What was actually accomplished?

This project provided mango-drying equipment to the Good Life Women's Co-op in Accra, Ghana. As part of the project, the members of the co-op were trained in the use of the equipment.

c. When and where did the project take place, and who were the beneficiaries?

The project took place between November 2006 and January 2007. The grant funds arrived in November 2006, and we placed the order for the equipment shortly thereafter. In late December, the equipment arrived at the Good Life Women's Co-op in Accra, Ghana and the members were subsequently trained. The 50 members of this co-op are the beneficiaries of the project.

2. Scope change. If the project was changed, how and why was it changed?

The scope of the project did not change from what was originally planned.

### **Rotarian Involvement and Oversight**

3. How did Rotarians manage and oversee the project?  
 Rotarians were in charge of every aspect of this project from the planning stages through to the very end. Rotarians developed the project, received grant funds from The Rotary Foundation, oversaw all project expenditures and maintained detailed financial records. Rotarians ensured that all reporting requirements were met.
4. How many Rotarians from the host partner club participated in the project? 25
5. In what way did the host Rotarians participate in the project? Please list all non-financial involvement.  
 Rotarians from the host club worked with the Women's Co-op to determine the type of equipment that was needed. They researched equipment prices and worked with the local supplier to see that the equipment was delivered and installed in the co-op. Host Rotarians made arrangements for international Rotarians to visit the co-op. The host Rotarians also helped the women to develop local markets in which to sell the dried mangoes. Together, the host and international Rotarians participated in training the women on how to use the equipment.
6. How many Rotarians from the international partner club participated in the project? 12
7. In what way did the international Rotarians participate in the project? Please list all non-financial involvement.  
 International Rotarians participated in the planning of the project through communication and a visit to the co-op before the project began. Once the equipment was installed, international Rotarians traveled to Accra to participate in the equipment training. Throughout the life of the project, the international Rotarians communicated regularly with the host partner.

### **Community Impact**

8. How many people benefited from the project? 350
9. What was the impact of the project on the beneficiaries?  
 With the receipt of this equipment, the members of this co-op have been able to generate income needed to support their families. They are able to feed their children and pay for their school fees. Along with increased income has come increased self-confidence. These women recognize themselves as productive members of society and feel proud that they are able to provide for their families in such a tangible way.
10. What are the expected long-term community impacts of the project?  
 In the long-term we expect that this entire community will continue to improve itself as the women who belong to the co-op are able to generate much needed income. Community members will have sufficient funds to obtain health better health services, more children will be able to attend school and the standard of living will continue to improve.

## Financial Statement

Currency Used: GHC Exchange Rate: GHC9,150 =1 USD

### 11. Income

Sources of Income	Currency	Amount
1. TRF Matching Grant Award and Contributions	GHC	105,225,000
2. Other Income (identify):	---	
3. Other Income (identify):	---	
4. Interest Income (if any)	---	
Total Income	GHC	105,225,000

### 12. Expenses (add rows as needed)

Budget Items	Name of supplier	Currency	Amount
1. Mango drier	#1 Fruit Drying, Accra	GHC	77,775,000
2. 50 drying racks	#1 Fruit Drying, Accra	GHC	9,150,000
3. 500 litres of mango preservative	#1 Fruit Drying, Accra	GHC	9,150,000
4. Plastic packaging	Ghana Plastics Company	GHC	4,575,000
5. Warranty	#1 Fruit Drying, Accra	GHC	4,575,000
	Total:	GHC	105,225,000

13. **Bank Statement**-A bank statement that supports the above statement of income and expenses must be attached to this report.

### Important – please read:

- For final reports, if there is less than US\$200 remaining, please spend it on eligible items. If there is more than US\$200 remaining, it must be returned to The Rotary Foundation. [Note: In India, government rules require that all unutilized funds be returned to the Rotary International South Asia Office.]
- For grant awards over US\$25,000, attach an Independent Financial Review to each progress report and the final report.
- Keep all original receipts for at least three years, or longer if required by local law. Do not send receipts to TRF unless requested by staff.

By signing this report, I confirm to the best of my knowledge that these Matching Grant funds were spent according to Trustee-approved guidelines and that all of the information contained herein is true and accurate. Original receipts for all expenses incurred will be kept on file for at least three years, or longer if required by local law, in case they are needed for auditing purposes.

14. **Certifying Signature** – Either the Host or International Partner must certify the report. If the grant is club sponsored the current club president must certify the report and if the grant is district-sponsored the district grants subcommittee chair must certify the report.

Print Name: Sam Wilson Signature: *Sam Wilson* Date: 1 Feb 2007

Rotary title: President Club: Accra Downtown District: 9000

As part of our efforts to improve our grant program, we'd appreciate your feedback on the following questions:

**A. Project Sustainability – select all that apply**

- The project will continue to function without Foundation funds.
- Equipment purchased with grant funds is being maintained with local materials and expertise.
- If training was a component of the project, trainees are using their knowledge and skills.
- This project has provided community members with the skills, knowledge, or institutions that will allow them to help themselves.
- The community has initiated additional projects related to the same or similar problems.
- The project has not been sustainable.

**B. Rotary Impact –select all that apply**

- Our club or district's international Rotary connections are stronger as a result of this project.
- Club membership has increased as a result of this project.
- Visibility of Rotary in our community has increased.
- Our club's awareness of the needs in our community has increased.
- Volunteer activity in our club or district has expanded.
- Our club or district is more active in pursuing Foundation grants and Rotary programs.
- Awareness of the needs in our community has increased among Rotarians in other countries.
- Participation in this Matching Grant has not changed our club or district in any significant way.

**C. Suggestions**

Given your experience, do you have suggestions to improve the Matching Grants program?

If your project clearly demonstrates Rotarian involvement and is worthy of publication, please complete an RI Newstip Form, available on the RI website at [http://www.rotary.org/newsroom/downloadcenter/pdfs/mg\\_newstip.pdf](http://www.rotary.org/newsroom/downloadcenter/pdfs/mg_newstip.pdf)

**Report Checklist**

**Does your report include the following?**

- Time period of reporting
- How and what the project accomplished
- Rotarian participation, oversight and management
- Rotary impact
- Itemized report of income and expenses
- A bank statement
- Certifying signature
- Independent Financial Review for grant awards of US\$25,001 or more

**Have you done the following?**

- Made copies of the report for both the host and international partner
- Returned surplus funds over US\$200 (except in India where all unutilized funds must be returned)
- Made a file to store the report and receipt copies for three years or longer if required by local law

## 附錄 G 配合獎助金資源名單

### 出版品與文獻

人道專案宣傳指南

(250-EN)

配合獎助金申請書

配合獎助金給獎的約定與條件

配合獎助金報告書

### 網路

配合獎助金: [www.rotary.org/foundation/grants/matching](http://www.rotary.org/foundation/grants/matching)

### 扶輪領導人

地域扶輪基金協調人

地區扶輪基金委員會主委

地區獎助金小組委員會主委

### 人道獎助金計劃

扶輪基金會職員 (個別職員的服務區域列表於 RI 網站 [www.rotary.org](http://www.rotary.org))

E-mail: [grants@rotary.org](mailto:grants@rotary.org)



## 配合獎助金 10 大易犯錯誤

1. 預算與籌款不相等
2. 扶輪社員的參與僅限於捐獻資金。
3. 在獎助金核准以前就將捐獻寄到 TRF。
4. 申請書零零碎碎的上傳。
5. 夥伴們拖欠報告。
6. 申請書上未簽署。
7. 夥伴們之間的溝通很少。
8. 專案並未滿足社區實際需求。
9. 夥伴扶輪社在 RI 的名聲不好。
10. 夥伴們未經 TRF 事先核准就變更專案的內容。

“本專案展現了許多扶輪如此偉大之處以及其縮短文化的差異而將全世界的人們聚在一起的能力。”

— Randy Lickey, 7600 地區前總監 (美國維吉尼亞州), 描述一項在黎巴嫩協助為腦性痲痺兒童中心購置設備的配合獎助金

本中文版配合獎助金指南是由 3470 地區  
2007-08 總監陳仁德 PDG Ortho 翻譯, 歡迎指正  
[jdchen24@ms28.hinet.net](mailto:jdchen24@ms28.hinet.net)



The Rotary Foundation  
of Rotary International  
One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
[www.rotary.org](http://www.rotary.org)