

## Rotary Australia Relief Fund (RARF) - a public benevolent institution

### What is the Rotary Australia Relief Fund (RARF)?

RAWCS has established the **Rotary Australia Relief Fund (ABN: 80 595 697 237)** as a **Level 2 Deductible Gift Recipient (DGR)** fund to enable *collection of funds* for a specific area of **relief**, for example bushfires, floods, other natural disasters or calamities that have a significant impact on communities.

Generally, these tax-deductible appeals are established at the time the disaster is occurring and are well in advance of detailed relief projects being formulated. After a relief project has been formulated the RAWCS Disaster Response Committee will determine if a project fits the specific area of relief that the RARF appeal was intended for make a recommendation to the Board.

**Level 2 DGR Funds** are “giving” funds and CANNOT be spent directly but must be transferred to a **Level 1 DGR Fund**, the “doing” funds, that undertake Projects for the outworking of the relief aid. RAWCS has two Level 1 DGR funds:

- the Rotary Australia Overseas Aid Fund (RAOAF); and
- the Rotary Australia Benevolent Society (RABS) including the Rotary Australia Compassionate Grants (RACG).

The projects registered under RAOAF or RABS (inc RACG) will be the recipients of RARF appeal funds.

RARF is administered on a *national basis*, fully utilising the RAWCS website and our online donation facility to minimise administration costs.

RARF Appeal can only be established by the RAWCS Executive Committee and must have the approval of the RAWCS Treasurer or, in his absence, the RAWCS Chair or Secretary. Before seeking a RARF Project, it is strongly suggested that you seek the advice of the RAWCS National Treasurer – [treasurer@rawcs.org.au](mailto:treasurer@rawcs.org.au).

The Appeal Manager and Deputy Appeal Manager of all RARF Appeals are members of the RAWCS Board.

### How to seek RARF funding for a specific relief project.

The RAWCS Disaster Response Committee will consider applications for funds from a RARF Appeal by projects registered under either the RAOAF or RABS (inc. RACG). The projects must be in the designated area of relief that the RARF appeal was set up for.

The RAWCS Disaster Response Committee will assess the applications and make recommendations to the RAWCS Executive. The decision of which Projects are selected to receive funds from the RARF is solely a decision for the RAWCS Executive Committee and the allocation of funds to the successful DGR1 Projects will be upon receipt of a written acknowledgement of the reporting requirements.

### Procedure for determination of RARF funds distribution:

1. A RARF appeal requires a project to address the relief response.
2. The designated RARF Appeal Manager will issue a call for Expressions of Interest from Rotary Clubs seeking a Project Brief / Proposal for funding to address the specific event response.
3. The applications for funding being the Project Brief / Proposal will be assessed by the RAWCS Disaster Response Committee.
4. The Disaster Response Committee, on advice from the RARF Project Manager as to the total funds available for distribution, will make a recommendation to the RAWCS Executive Committee who will authorise the funds distribution and instruct the RARF Project Manager to transfer the allocated funds to the successful DGR1 Projects.
5. The RAWCS Executive Committee will approve the fund distribution and instruct the RARF Project Manager to transfer the allocated funds to the successful DGR1 Projects upon receipt of a written acknowledgement from the DGR1 Project Managers, of the reporting requirements for Projects receiving RARF funding.
6. The CEO will maintain a list of DGR1 Projects which receive funding from each RARF Appeal. This list will include Project Number, Project Name, District, Sponsor Club, Overseas Club & District (if applicable), cumulative funds provided by RARF.

## **The Project Brief / Proposal**

All projects requesting a RARF distribution are required to provide a “Project Brief / Proposal” as to the nature, rationale and purpose of the project. The factors below will be taken into consideration by the Disaster Response Committee when considering project briefs / proposals:

- *Relevance:* an assessment of the project in meeting the needs of the relief effort associated with the RARF Appeal. The project will also need to be relevant to Rotary’s mission;
- *Effectiveness:* the extent to which the project meets the designated relief effort and Rotary’s purpose including an assessment of the humanitarian situation and the need;
- *Efficiency:* a measure of how well the resources are used to produce achievements and results;
- *Impact:* effects attributable to the beneficiaries;
- *Time is of the Essence:* preference will be given to those projects which can respond quickly and effectively to a disaster situation and the problems and needs of the relief effort;
- *Viability:* the degree to which the desired effects of a project last beyond its end;
- *Visibility:* the degree to which the project is committed to providing information and material to showcase Rotary as the pre-eminent not-for-profit Community Service organisation;
- *Beneficiaries:* the expected beneficiaries, being specifically targeted by age, gender, income, ethnic identity, or other suitable descriptions. Is the project a hand out or a hand up;

- *Organizational Capacity*: an assessment will be made of the organizational capacity of the implementing Rotary stakeholder and partners to deliver results, and
- available funding.

Other factors taken into consideration will include contributions of other donors and relief agencies and the financial participation and commitment of the Rotary Clubs and partners.

## Note

- **Disaster Relief projects** both in Australia and outside Australia must be for relief to people. Project applications must have an MOU explaining who is acting in the community to distribute the relief (usually it will be a Rotary Club or District), how the relief benefit will be given and the people who will benefit from the relief given.
- **All proposed projects** must comply with the current project requirements of either a RAOAF or RABS project
- **All projects must** provide, on a Regular Basis, information, reports, stories and material to showcase Rotary. “Regular Basis” means monthly for the first 6 months and then quarterly thereafter. Given the size and scale of the funding distribution and the nature of the relief effort, RAWCS may at its discretion, request the project to provide information monthly for the first 6-12 months. This requirement will be determined at the time of the funding transfer. This is a **MANDATORY** requirement for any request for Rotary Australia Relief Fund (RARF) funds and one that Project Managers need to pay close attention to and adherence to.
- If the Rotary Awareness material is more than 3 months in arrears, the Project may be marked SUSPENDED.

## The Fine Print

### A. Payments

- After RARF funds have been transferred to a RAWCS project account, ALL payments for the project expenditure will be made by the RAWCS National Secretariat upon the request of the Project Manager.
- The Project Manager can authorise expenditure of funds from the Project account. Regular payments to suppliers in Australia are made upon request of the Project Manager by authorising an invoice for payment and forward to RAWCS National Secretariat.

For outside of Australia, Project Managers must complete a “Request to Transfer Funds Form” available from the RAWCS website (<https://rawcs.org.au/key-documentation/>). The signed and completed form along with the associated artefacts verifying the expenditure should be emailed to the National Secretariat.

- The Project Manager is SOLELY responsible for ensuring that the Sponsoring Club management and Board is informed and aware of financial transactions in a Project.

### B. Surplus Funds

- If there are any surplus funds in the Project Account at the completion of the project, these funds must be returned to RARF for distribution.
- If a Project is “suspended” for any considerable length of time the RAWCS National Treasurer may authorise the transfer of funds to a different account

### C. Record Keeping and Reporting

- Financial records must be maintained by the Project Manager.  
Financial records are documents that:
  - show the project's financial transactions, position and performance; and

- allow financial reports to be prepared and audited.

These records include receipts, invoices, banking records, details of any contracts, details of any grant payments, salary records (if employees), and other similar documents.

- Reporting on a Regular Basis by the Project Manager.  
As a minimum, the Project Managers or, in their absence, the Deputy Project Manager will be responsible to complete and **submit online project reports every three months for the first 12 months**. RAWCS may require this to be monthly for the first 6 months  
An email will be sent to them with a link to the report. The Report needs to be completed online and then submitted. A copy will be sent to the Sponsoring Club, District Governor, District RAWCS Chair, Regional RAWCS Chair and the National Projects Manager as well as being placed on the project file.
- Auditability  
All projects can be subject to audit at any time by National and Regional officers of RAWCS or officers of the ACNC. Project Managers need to ensure that the Financial and Operational records are kept in such a manner to assess whether:
  - the project continues to be an eligible project.  
For example, the documents should show what activities are being undertaken for charitable purposes; and
  - the project is complying with its responsibilities and requirements under the ACNC Act or other applicable Government statutory requirements.
 Operational records are any other documents about operations connected with the Project. These may include meeting minutes, reports, and written details of charities activities, programs or services
- Note on Reporting:  
If a report is more than 3 months in arrears, the Project will be marked SUSPENDED and the Project funds will be frozen until the report is submitted. If a report has been outstanding for more than 6 months, the Project will be marked as SUSPENDED and the funds in the Project Account will be re-distributed to another Project by the RAWCS Board.

## **Summary of Specific Requirements to be acknowledged by RAWCS DGR1 Project Managers when receiving an allocation of RARF funds:**

In addition to the standard RAWCS requirements of non-RARF funded projects, Project Managers of projects receiving RARF funds must:

- Provide monthly reports and stories with photographs to showcase the project's progress and impact. These monthly reports are to be submitted to the RARF Project Manager for each of the first six months of the project, the "Rotary Awareness" undertaking.
- Submit on-line project reports every three months for the first twelve months of the project.
- Undertake to complete the project within two years of RARF funds being received.