

# DDF BEST PRACTICES

## Indicators on the path to maximum use of District Designated Funds

### JANUARY-JUNE

- Has the district checked the DDF balance online for the coming Rotary year?
- Does the district have a DDF allocation policy that promotes use of all funds?
- Has the district informed all clubs of the DDF policy?
- Has the district checked with past district leaders about pending grants?
- Has the district considered applying for the full available district grant amount?

### JULY-SEPTEMBER

- Is the district Rotary Foundation committee chair thoroughly reviewing global grant applications to ensure eligibility?
- Does the district include the carry forward amount when allocating DDF?

### OCTOBER-APRIL

- Has the district considered donations to PolioPlus, Rotary Peace Centers, or areas of focus?
- Does the district set priorities for DDF spending, including returned district grant funds?

### MAY-JUNE

- Does the district regularly reconcile its DDF records with the Foundation's?
- Does the district know the DDF balance at the end of the Rotary year?



Rotary





# DDF BEST PRACTICES

Use this road map to help you maximize District Designated Fund usage throughout the year.

## PLANNING

### JANUARY-JUNE

- To start planning, the Foundation committee should check the SHARE Contribution Detail Report on My Rotary for a preview of the DDF that will be available from Annual Fund-SHARE contributions three years prior.
- The district should ensure its DDF policy fosters clubs' participation in Foundation grants.
- The grants subcommittee should share the district's policy with clubs early so they can prepare to meet district due dates.
- Districts may confidently allocate the full amount of new DDF they are receiving, knowing it should be unaffected by DDF allocated to a global grant in a prior year.
- If the maximum district grant award is not being used, the subcommittees should consider whether to allocate the balance to global grants or donations.

## IMPLEMENTATION

### JULY-SEPTEMBER

- Because DDF may be tied up until global grants are approved, districts should diligently review global grant applications to ensure they're eligible.
- The district can allocate any part of the carry forward amount not committed to previous global grant applications to new projects.

### OCTOBER-APRIL

- If the district is unable to transfer 20 percent of its DDF to PolioPlus, it may still donate any amount to PolioPlus, Rotary Peace Centers, and several endowed funds, including areas of focus.
- The district may immediately allocate any returned district grant funds, which are added to its available DDF balance, to global grants or donations.

### MAY-JUNE

- The district can reconcile its records with the Foundation's by emailing a request to [share.mailbox@rotary.org](mailto:share.mailbox@rotary.org).
- The district should check the Available DDF by District Report on My Rotary at the end of the Rotary year to find out how much DDF will be rolling forward.