Rotary District 5490
District Grant Funding Request Guidelines 2016-17

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The District Grant is a once per year block grant of funds from the Rotary Foundation to District 5490. Rotary Clubs in District 5490 can request funds from this block grant to support qualified local or international projects led by the club. The following are the guidelines, requirements, and process to request funding from this block grant:

1. All District Grant funding requests must meet The Rotary Foundation requirements for District Grant spending as defined in the document: **Terms and Conditions for Rotary Foundation District Grants and Global Grants** (available on the RI and District 5490 websites).

2. Clubs must be "qualified" to manage Rotary Foundation funds before requesting funds from the District Grant. To be qualified, a club must:
    a. Agree to implement and sign the District Grant Memorandum of Understanding for clubs (Available at www.rotary5490.org). This includes the implementation of a club financial management plan for administration of grant funds. The signed MOU must be sent to the District Stewardship Chair Rebecca Wilks, info@drwilks.com) prior to the District Grant application due date.
    b. Have at least two members attend the District Foundation Grants Seminar annually. It is highly recommended that the President-Elect and Club Rotary Foundation Chair attend. Note: the Club can send as many participants as desired.
    c. Be current on its RI and District dues, and in good standing with the District, Rotary International, and The Rotary Foundation.
    d. Be current on Rotary Club tax returns. Clubs must send a copy of their tax return to the District Secretary prior to the District Grant Deadline or to submission of a Global Grant.
    e. Be current on all Rotary Foundation Grant reports.

3. General Guidelines:
    a. Projects which are excluded under section III of the **Terms and Conditions for Rotary Foundation District Grants and Global Grants** will not be approved.
    b. Projects must be completed, including expenditure of all funds and submission of the final report, with all receipts for spending and Bank/credit card statements, prior to March 31st, 2017. Extensions to this deadline may be possible, if requested at the time of District Grant application.
    c. Funds can be requested for local or international projects. An international partner Rotary club is not required but it is recommended for international projects.

d. Funds <u>cannot</u> be requested for any projects which have already been started or completed.

e. Requests for funds are competitive and limited. It is anticipated that not all applications will be funded and that some requests may be partially funded. Clubs should not commit any funds to projects until they have been approved.

f. The maximum grant amount for a single club project is $2,500. However larger grants can be made to projects involving multiple clubs cooperating together.

g. Clubs will be expected to provide at least 50% of the funds used in a particular project. For example, on a $1,600 project, the club would provide $800 and request a maximum of $800 from the district

h. Clubs may submit more than one project for consideration; however limited available grant funds may preclude the approval of more than one project. Clubs will not be awarded two projects unless there are available funds left after all other qualified club projects have been approved. In the event that a club submits more than one application, it will be important to identify the project which is their first priority.

4. Funding Decisions and Criteria for Approval. Decisions on funding will be made by the District 5490 Rotary Foundation Committee.

   a. Collaboration with other Rotary Clubs and civic organizations is encouraged.
   b. Projects should benefit as many people as possible.
   c. Clubs are encouraged to do projects which address one of The Rotary Foundation areas of focus:
      i. Peace and conflict prevention/resolution
      ii. Disease prevention and treatment
      iii. Water and sanitation
      iv. Maternal and child health
      v. Basic education and literacy
      vi. Economic and community development
   d. Projects which are self sustaining are encouraged, where possible. The Rotary Foundation defines sustainability as the capacity for maintaining outcomes over the long term to serve the ongoing need of a community after grant funds have been expended. A sustainable project typically involves local community leaders in planning so that they are invested in the project's long-term success. Training and the exchange of information prepare communities to maintain results and solve problems on their own, after the Rotary club's involvement has ended. Sustainable projects offer enduring value and a greater return on Rotary's investment of money and volunteer hours.
   e. Per-capita club giving to the Rotary Foundation will be considered in the approval process. Higher per-capita giving will increase the probability of approval, all other factors being equal. Every participating club's giving will be considered on joint club projects.
   f. Priority will be given to clubs which have submitted District Grant reports in a timely fashion during the previous Rotary Year.

g. Priority will be given to applications which are complete at the application deadline, including project budget, and completion of all qualification requirements including a properly executed MOU and submission of a copy of the club's current tax return.

5. Application Process
   a. Prepare a project budget using the budget form (available at www.rotary5490.org). This is a writable pdf document which must be saved as a pdf and uploaded in the application process – form available on the district website.

   b. Complete the application on line at www.matchinggrants.org/district. Note: This website is used by multiple districts and a summary view of all project funding requests will be visible publically. Clubs can refer potential project partners to this site to generate additional financial support for their projects.

   <u>Website Instructions</u>
   a. From the main page, click on "Submit Project" tab
   b. Read instructions carefully.
   c. Proceed to the application process by clicking on "Submit New Project"
   d. Select the 2016-17 Rotary Year.
   e. Complete the requested information. The project description should include the following information:
      i. The clubs and club presidents involved in the project (all of them if it is a joint club project).
      ii. A complete description of the project objectives including how the project will benefit the community and/or improve the lives of the less fortunate.
      iii. Describe the non-financial participation by Rotarians in the project (i.e., specific Rotarian activities).
      iv. Describe how the general public will know this is a Rotary-Sponsored project. Please provide details, e.g., publicity in a newspaper, radio, television, display of the Rotary wheel.
      v. If the project involves a cooperating organization, please provide the name(s) of the organization(s). By submitting this application, the Rotarian sponsors endorse the organization as reputable, responsible, registered with the project country, and acting within the laws of the project country.
      vi. Mailing address to send the check to, should the grant be approved and funded.
   f. Click "Save".
   g. The project will receive a unique project number and you will be taken to the Project Summary Page.
   h. If you do not already have an account for the website, a password will be emailed to you when you save your first project. Your login to the site is your email address and this password. Please keep this information accessible for future use whenever you are using this website.

        i.   Login to your account by clicking on "My Account"

        j.   Select the project you just saved.

        k.   Click on "Administration" button.

        l.   Click on the "Documents" tab.

        m. Upload the project budget previously prepared. Note, this must be a pdf document.

        n.   Optional - Upload any other documents that would help to support the project proposal. Note: all files must be in pdf format.

        o.   Click on the "History Logs" tab.

        p.   Under the section titled: "Add People to the Distribution List / Give Administrative Access", add additional names that should sign the project or have access to the project. This needs to include the name of every club president involved in the project if it is a multi-club project.

        q.   The project will be reviewed by a District committee member and if all information is complete, it will be published. Once published, you will be given an email notification.

        r.   Once published, return to the website and login.

        s.   Click on the "Administration" button.

        t.   Click on the "Description" tab.

        u.   Click on "Start "Club Signature Process"

        v.   Check all users that need to sign the project: This must include all club presidents for every club involved in the project if it is a multi club project. It also needs to include Fred Goldman, the District Grants Chair.

6. Reports
   a. Clubs receiving District Grant funds must provide a short final report of project outcomes to the District Grant Chair – form available on District website.
   b. Scan receipts related to all project spending of District Grant funds into PDF format.
   c. Scan checking and/or credit card statements with grant-related expenditures underlined into PDF format.
   d. Upload final reports, statements, and receipts to the project website under the "Documents" tab when complete.

7. Timing
   a. The deadline for submitting funding requests for the 2016-17 Rotary year is May 15, 2016. Late applications will be considered only if funds are not completely allocated to projects whose applications were complete before the deadline.

   b. The District Rotary Foundation Committee will meet as soon as practical after the deadline to develop a spending plan for the District Block Grant, considering all club requests and all other proposed requests.

   c. A committee resolution and spending plan will be sent via email to every grant applicant which will include a notification that the District has approved the spending plan but that funding approval will not be final until the District Grant has been approved by The Rotary Foundation.

d. The District Grants Chairperson will apply for the District Grant using the approved District Spending Plan as soon as possible following the Committee's Resolution but no later than June 15th.

e. Checks for approved projects will be sent to clubs in July or as soon as funds become available from The Rotary Foundation.

f. Final reports, including receipts and bank/credit card statements are due March 31 2017.