LEARN

Rotary District 5040

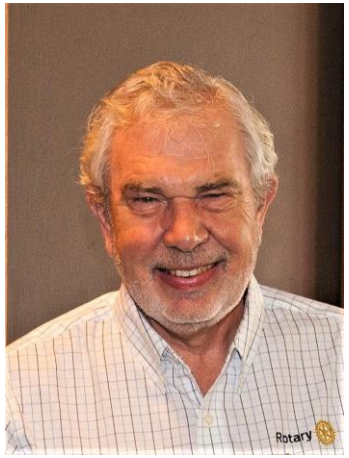
DISTRICT GRANTS TRAINING SEMINAR 2023-24

The Rotary Foundation

CREATE HOPE in the WORLD

Presenters

Ian Grant
Rotary Club of Pender Harbour
Vice Chair Foundation Committee
AG Sunshine Coast
Past District Grants Chair
Ian_grant@telus.net



Brian Finley
Rotary Club of Squamish
District Grants Chair
blfin@shaw.ca

The Rotary Foundation

CREATE HOPE in the WORLD

2023-24 Rotary Theme

CREATE HOPE
in the WORLD

The Rotary Foundation

CREATE HOPE in the WORLD

The Rotary Foundation

DOING GOOD IN THE WORLD

IS MADE POSSIBLE BECAUSE OF ROTARY MEMBERS LIKE YOU

The Rotary Foundation

CREATE HOPE in the WORLD

PROGRAMS

PolioPlus **Since 1988, Rotary and our partners have immunized nearly 3 billion children against polio. As of June 2021, Rotary had committed more than $2.2 billion to global polio eradication. We're still working to eliminate the wild poliovirus in the last two countries where it remains endemic and to ensure that it does not return elsewhere. In 2020-21, program awards, including PolioPlus Partners grants, totaled $152.9 million.**

Rotary Peace Centers **Each year, the Foundation supports the training of peace fellows at Rotary Peace Centers, where they earn master's degrees or professional development certificates. Since 2002-03,1,487 fellows from more than 115 countries have participated. In 2020-21, 117 fellows from 63 countries began their studies at the Rotary Peace Centers, and program awards for the fellows and centers totaled $4.4 million.**

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Polio Rotary's Major Program

END POLIO NOW

Rotary

- **Job is 99.9% complete, but we cannot let up yet**
- **If we stop now there would be 200,000 cases again within ten years**

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Polio Today

Since 1988, we've seen a worldwide reduction in polio cases of 99.9%. Only two countries remain polio-endemic: Afghanistan and Pakistan.
Access the Full Case Count
Afghanistan
02
Reported Wild Poliovirus Cases
2022: 02
2021: 04
2020: 56
Pakistan
01
Reported Wild Poliovirus Cases
2022: 20
2021: 01
2020: 84

ROTARY PEACE CENTERS

As of July 1st, 2022 the new international Chair of the Rotary Peace Centers Committee, which every year selects the Rotary Peace Fellows for the 50 Master's Degree or 80 Professional Certificate programs in peace and conflict resolution at seven universities throughout the world, is Past District 5040 Governor Chris Offer. Member of the Rotary Club of Ladner, Chris also serves on the board of The Rotary Foundation Canada.

The seven universities are: Chulalongkorn University, in Bangkok, Thailand; University of Bradford, in Bradford, England; University of Queensland, in Brisbane, Australia; Uppsala University, in Uppsala, Sweden; Duke University and University of North Carolina, in Durham and Chapel Hill, North Carolina; International Christian University, in Tokyo; Makerere University, in Kampala, Uganda.

Rotary
Agents of Peace

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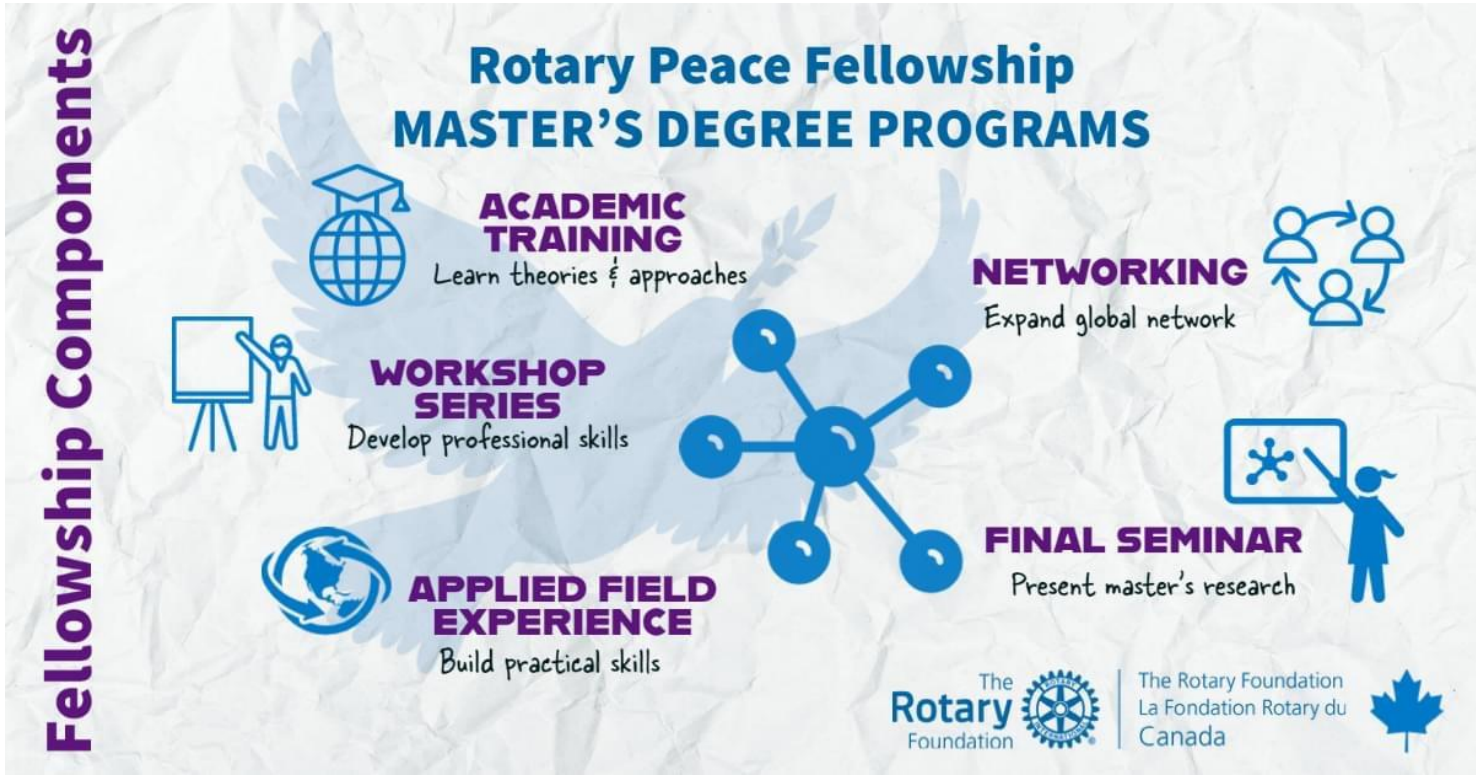
OUR ROTARY PEACE SCHOLAR

Vanessa Lanteigne our latest Peace Scholar



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IMAGINE ROTARY

PROGRAMS

District grants District grants support small-scale, short-term projects related to the Foundation's mission. In 2020-21, the Foundation approved 467 district grants, and program awards totaled $31.1 million.

Global grants Global grants fund large-scale international activities with sustainable, measurable results that support Rotary's areas of focus. Activities include humanitarian projects, scholarships, and vocational training teams. In 2020-21, the Foundation approved 2,066 global grants, and program awards totaled $130.0 million.

Disaster response grants Rotary's disaster response grants support relief and recovery efforts in areas that have been affected by natural disasters within the past six months. In 2020-21, the Foundation approved 55 disaster response grants, and program awards totaled $3.1 million.

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Grants Last Year

2021-22 Grant Summary

478 district grants	**207** disaster response grants	**1,199** global grants	**1** programs of scale grants
$27m program awards	**$8m** program awards	**$73m** program awards	**$2m** program awards

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ANNUAL FUND

- Primary funding source for our Foundation grants and activities – the operating account
- Supports local and international **grants** through the **AF SHARE** system
- Contributions are invested for 3 years, the interest is used to fund administration costs
- Contributions are credited to donor's club and applied to club's goal – cumulative recognition
- Contributions also generate recognition points which can be used to recognize others

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District Foundation Comparative Results (May)

	2019/2020	2020/2021	2021/2022	2022/2023
Annual Program Fund	$205,013	$275,126	$404,065** ** Ukraine $130,000	$265,043
Per Capita	$148	$214 ($250 #24)	$310 ($389 #10)	$218 (#37)
Polio Plus	$57,446	$79,508	$87,319	$66,710
Other Projects	$17,309	$12,809	$15,356	$100,808
Endowments	$63,058	$160,116	$340,182	$316,674
Total Giving	$342,826	$527,559	$846,922	$749,235
Year End Results	$381,829	$591,897	$1,013,045	$880,000 EST.

EVERY ROTARIAN, EVERY YEAR

574 or approx. 54% of our members contributed at least $25 US last year

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100% Member Participation is the goal.....

How you choose to support is up to you

CREATE HOPE in the WORLD

Rotary Direct

Rotary's recurring giving program

167 members or approx. 14% of our total district membership contribute through Rotary Direct

The Rotary Foundation

Rotary Direct saves...

- ✔ **Time** — Sign up once to give continuous support
- ✔ **Money** — Lower administration costs means more money for programs
- ✔ **Lives** — Give to The Rotary Foundation to do good in the world

Efficient.

Doing good just got easier!

Enroll online at www.rotary.org/contribute

GIFTS OF ANY SIZE HAVE A BIG IMPACT

The Pakistan Flood Response Fund and the Ukraine Response Fund

In January 2023 The Rotary Foundation Trustees established two temporary funds to assist Pakistan and Ukraine, two areas that are facing extreme need.

The Pakistan Flood Response Fund and the Ukraine Response Fund address the humanitarian crises caused by devastating flooding in Pakistan and the war in Ukraine. Donors can give directly to relief efforts led by Rotary members.

Contributions will be accepted until 31 December 2023. Districts can apply for grants from the funds until 30 June 2024 or until the funds have all been allocated. Any contributions that haven't been spent by 30 June 2024 will be transferred to the general Disaster Response Fund, to be made available for disasters worldwide.

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Pakistan Disaster Response Fund

- Devasting flash floods-Monsoons/Atmospheric River last year
- 33 million people were affected
- 2 million homes destroyed displacing 8 million people
- One third of the country was submerged
- Funds are to be collected until December 31st and to be used up by June 30, 2024
- Raised $1,312 To-Date

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Ukraine Support 2022

- The Rotary Foundation- Disaster Response Fund grants raised $15.5 US million in just 2 months (March/April)!
- 400+ Disaster Response Fund Grants to spend the $15.5 million
  - Medical Equipment/Supplies, ambulances, fire trucks, RIB, Diving equipment, food, water, shelter, generators, warm clothing, etc…
- Our District raised over $300,000 CDN
    - $130,000 US for the Disaster Response Fund Grants
    - $ 25,000 US District Designated Funds
    - $ 80,000 CDN Shelter Box
    - $ 30,000 CDN Red Cross

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Ukraine Disaster Response Fund

- 18 million people have fled the country
- 40% of the country's population have had to leave the country for safety
- Medium- and Long-Term needs are growing
- Total destruction of many villages, towns and cities
- Destruction of key infrastructure has impacted access to power, clean water, ability to heat their homes/living quarters, accessing food etc…
- Working group that meets every 3-4 weeks on what is most needed.
- Working on a Disaster Response Grant- Village of Moshchun- 300 Modular Units needed
- Raised $7,763 To-Date

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Turkey/Syria Disaster Response Fund

- Earthquake
- Over 60,000 people killed
- Over 400,000 apartment/homes destroyed displacing close to 1,000,000 people
- Difficulty in assessing the Syrian side due to government/border issues
- Expected short-term relief and funds were collected until March 31st
- Primary needs is Medical, Housing, other basic needs
- Shelter Box (Hero Awards)
- Raised $8,953 (31 donors)

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Year End Reminders

- Clubs
  - Meeting Annual Program Fund (20 clubs still under plan) and Polio Plus (24 clubs still under plan) Goals set in RCC
  - Donate at least $1,500 US to Polio (21 clubs have achieved and 4 are close)- Certificate from RI
  - Check results and if close to $10,000 US (APF + Polio)- Certificate of Appreciation 17 Earned already and 4-5 clubs are also very close
  - EREY and TRF Giving Banners (7 earned so far with 3 clubs at 80% or better)- If close to 100% of club donating
- Individuals
  - Commitments to Paul Harris Society (37 of 102 have made their $1,000 US commitment for this year). 31 Rotarians have made at least $1,000 US donation and have not joined the PHS!!
  - Commitments to Polio Society (70 of 140 have made their minimum $100 US commitment so far this year)
  - EREY/Sustaining member donations (currently at 41.0% compared to 56.5% last year at the same time)

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CREATE HOPE in the WORLD

D5040 District Grants 2023-24

Agenda

- Qualify Your Club – for District Grants Applications
- District Grants and your Projects
- Applying for a District Grant
- District Grant Timelines

Brian Finley
District Grants Chair 2022-24
Rotary District 5040
Rotary Club of Squamish

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D5040 District Grant examples – local community

A District Grant can help you complete a project in your local community:

Powell River

Squamish

In 2015, the Rotary Club of Squamish received a District grant for $10,000 to build the Rotary Pavilion at the then under-construction Legacy Sports Park in Squamish. Club members were actively involved during the construction.

Rotary Pavilion
The Rotary Club of Squamish
The Rotary Foundation
Our Partners and Donors
Sea to Sky Nordics
Fraserwood Industries
Timberhaven Millworks
Big Horn Productions
Pacific Elevations Contracting
Triton Automotive & Industrial
Summit Concrete Specialties
Cardinal Concrete
December 2015

D5040 District Grant examples – local community

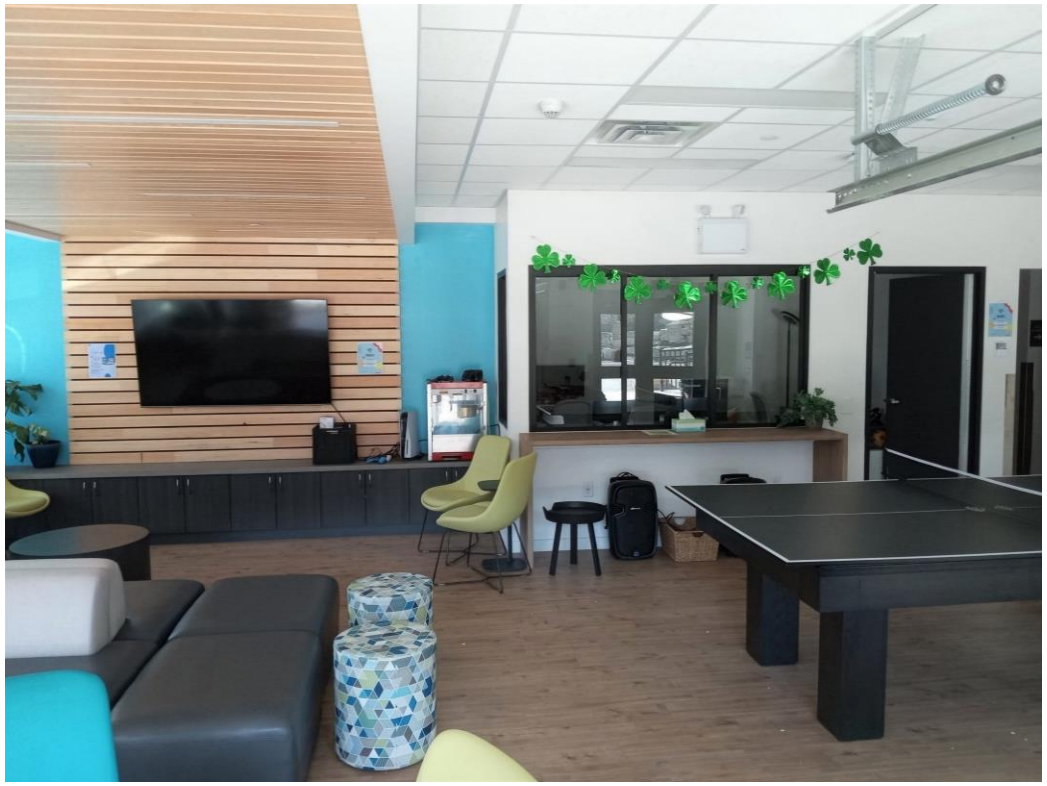
A District Grant can help you complete a project in your local community :

Terrace – community dog park

Playground equipment & seating.

D5040 District Grant examples – local community

A District Grant can help you complete a project in your local community :



Furniture, technology & recreation equipment for a new youth centre.

Climbing Park – Williams Lake Daybreak.

D5040 District Grant – clubs working together

A District Grant can help you complete a project in your local community:

Furnish a Hospice room ++ - $100K.
Sea to Sky clubs – joint project

New Westminster Royal City
& New Westminster "Tugger" Project

D5040 District Grant examples - international

A District Grant can help you complete a project in your international community :

Chicken farm at a girl's refuge in Manila

Solar panels at an orphanage in Mexico

D5040 District Grant examples - international

A District Grant can help you complete a project in your international community :

Rotary Club of Gibsons
100 Survival Garden Kits Project

Sunshine Coast Clubs
Educating children in Bangladesh

D5040 District Grant examples - international

A District Grant can help you complete a project in your international community :

Rotary Club of West Vancouver Sunrise
Provide 50 Buffalo Bikes to schoolgirls in rural Africa.

D5040 District Grants 2023-24

FUNDING FOR: short-term, small scale projects with a grant from C$1,000 to C$10,000.

PURPOSE: to address needs in your community and abroad.

HOW TO APPLY: after becoming qualified, clubs apply to the District using the Grants module on the District website.

HOW IT WORKS:

- **The District is allocated funds by the Rotary Foundation (District Designated Funds or DDF).**
- **DDF comes from donations made to the Foundation Share Fund 3 years ago.**
- **When there are sufficient club applications, we send a list (spending plan) of the approved projects to the Rotary Foundation.**
- **We receive back a block grant which is used to fund the individual grants for approved club projects.**

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D5040 District Grants

Before you can apply for a Grant you must:

1. **Qualify your Club.**
   - **Have at least 2 trained members.**
   - **Sign the Memorandum of Understanding – MOU.**
2. **Plan your Project**
   - **scope**
   - **partners**
   - **budget**
   - **resources**
   - **timescale**

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D5040 District Grants

QUALIFICATION REQUIREMENTS 2023-24

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Qualify Your Club – applies to District Grants

- The qualification process helps ensure that your club understands the grant process, and your stewardship & financial responsibilities.
- Qualification must be completed each year.
- To qualify:
  1. at least two members of your club participate in the District 5040 District Grants training sessions (this session).
     or at least one member attends the District Grants training and one other member takes the Grants Management Seminar in the Learning Center on My Rotary.
  2. Your President and President-Elect must sign the MOU.

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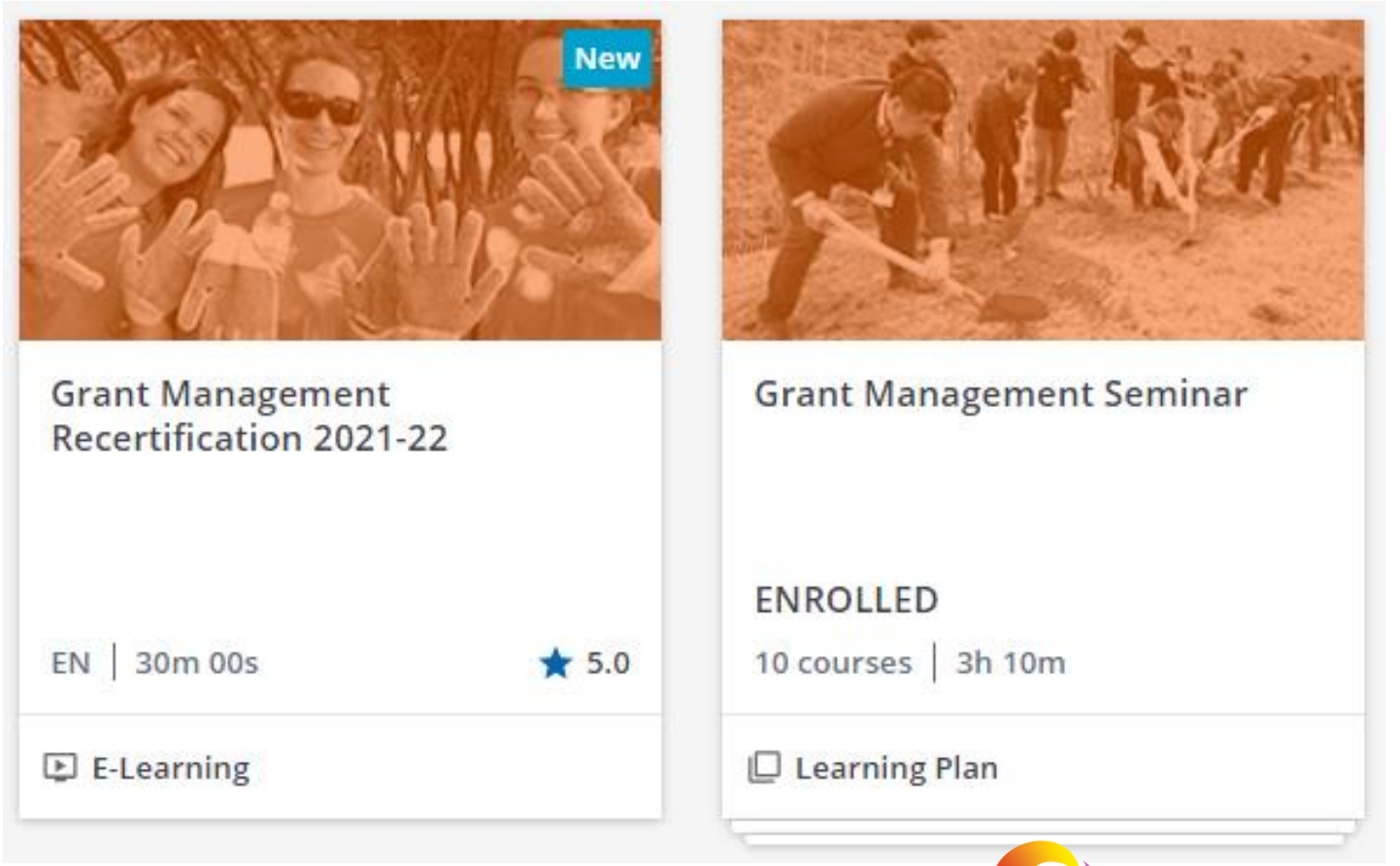
Grants Management Seminar & Re-certification

People who have completed the full 10-course seminar will now need to take just the Grant Management Recertification course each year.

To qualify, send me a copy of the course certificate.



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Memorandum of Understanding (MOU)
- signed by President & President-elect

"The Memorandum of Understanding is an agreement between the club and the District and the Rotary Foundation and acknowledges that the club will undertake measures to ensure the proper stewardship and implementation of grant supported projects."

- **Have a proper financial management plan**
- **Maintain copies of all financial transactions**
- **Accurate and timely reporting**
- **Ensuring no conflict of interest**
- **Report potential or real mismanagement of grant funds**

The Rotary Foundation or the District Grants committee may audit clubs or projects.

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CREATE HOPE in the WORLD

The District maintains an on-line record of qualified members and clubs

Qualified Clubs

« Previous Year | 2021 - 22 | Next Year »

In order to be qualified to submit a grant application, a club must satisfy the following criteria:
1) Sign a Memorandum of Understanding for the year of the Grant Application
2) Have at least 2 trained members

Qualified	Club Name	Trained Members	MOU	
	100 Mile House	0 View Members	✓	Edit
✓	Bowen Island	3 View Members	✓	Edit
✓	Burnaby	3 View Members	✓	Edit
✓	Burnaby Deer Lake	4 View Members	✓	Edit
✓	Burnaby Metrotown	2 View Members	✓	Edit
	Burns Lake	3 View Members		Edit
	Dragon Club	1 View Members	✓	Edit
✓	Gibsons	4 View Members	✓	Edit
✓	Kitimat	5 View Members	✓	Edit
✓	Ladner (Delta)	4 View Members	✓	Edit

Member Qualification and On-Line Access

District Grant requests must be made through the Grants module on the D5040 website.

Only qualified members have access to apply for or update grants on the system.

Members who take this session will have access rights valid until June 30th 2024.

Members who take the Grants Management Seminar or the Re-Certification course need to send a copy of their certificate of course completion to the District Grants Chair and will be valid for 12 months.

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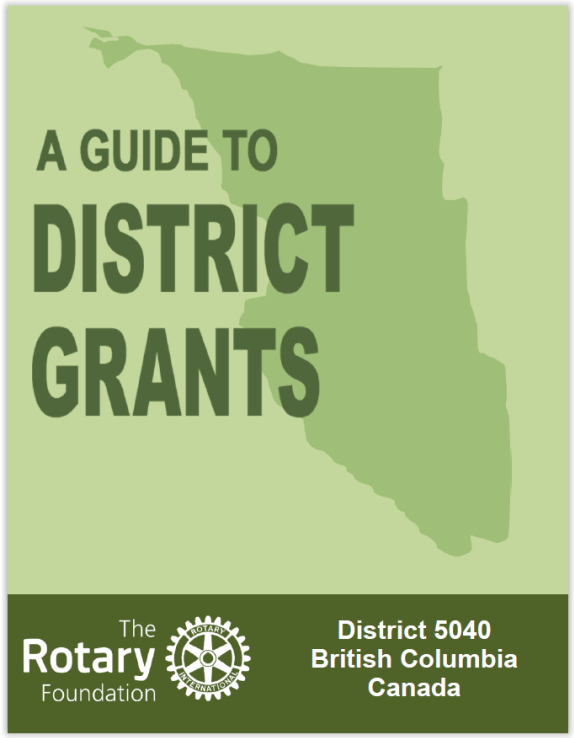
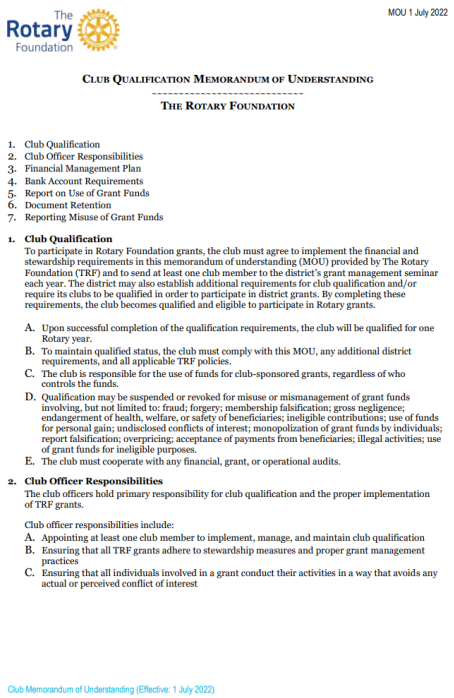
ROTARY FOUNDATION GRANTS – key documents





The Rotary Foundation

MOU 1 July 2022

Club Qualification Memorandum of Understanding

The Rotary Foundation

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds

1. Club Qualification

To participate in Rotary Foundation grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF) and to send at least one club member to the district's grant management seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in district grants. By completing these requirements, the club becomes qualified and eligible to participate in Rotary grants.

A. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.
B. To maintain qualified status, the club must comply with this MOU, any additional district requirements, and all applicable TRF policies.
C. The club is responsible for the use of funds for club-sponsored grants, regardless of who controls the funds.
D. Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes.
E. The club must cooperate with any financial, grant, or operational audits.

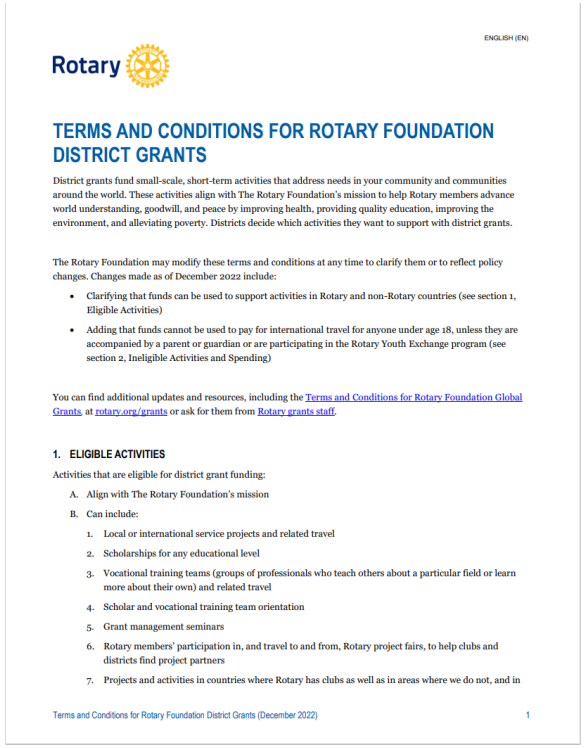
2. Club Officer Responsibilities

The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants.

Club officer responsibilities include:

A. Appointing at least one club member to implement, manage, and maintain club qualification
B. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices
C. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest

Club Memorandum of Understanding (Effective: 1 July 2022)



ENGLISH (EN)

Rotary

TERMS AND CONDITIONS FOR ROTARY FOUNDATION DISTRICT GRANTS

District grants fund small-scale, short-term activities that address needs in your community and communities around the world. These activities align with The Rotary Foundation's mission to help Rotary members advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty. Districts decide which activities they want to support with district grants.

The Rotary Foundation may modify these terms and conditions at any time to clarify them or to reflect policy changes. Changes made as of December 2022 include:

- Clarifying that funds can be used to support activities in Rotary and non-Rotary countries (see section 1, Eligible Activities)
- Adding that funds cannot be used to pay for international travel for anyone under age 18, unless they are accompanied by a parent or guardian or are participating in the Rotary Youth Exchange program (see section 2, Ineligible Activities and Spending)

You can find additional updates and resources, including the Terms and Conditions for Rotary Foundation Global Grants, at rotary.org/grants or ask for them from Rotary grants staff.

1. ELIGIBLE ACTIVITIES

Activities that are eligible for district grant funding:

A. Align with The Rotary Foundation's mission
B. Can include:
   1. Local or international service projects and related travel
   2. Scholarships for any educational level
   3. Vocational training teams (groups of professionals who teach others about a particular field or learn more about their own) and related travel
   4. Scholar and vocational training team orientation
   5. Grant management seminars
   6. Rotary members' participation in, and travel to and from, Rotary project fairs, to help clubs and districts find project partners
   7. Projects and activities in countries where Rotary has clubs as well as in areas where we do not, and in

Terms and Conditions for Rotary Foundation District Grants (December 2022) 1

Memorandum of Understanding

T&Cs for Rotary Foundation District Grants

Rotary

These documents are all available on the District 5040 website.
Reviewing these should be your first step in applying for a grant

CREATE HOPE in the WORLD

District Grant Funds available for 2023-24 is ~ C$95,000

2020-2021

Total Amount contributed By D5040 clubs & individuals to the annual fund share

3 years later

3 years later

2023-2024

47.5% Retained by The Rotary Foundation The World Fund *(For Global Grants)*

47.5% District Designated Funds, Global + District

District Designated Funds are evenly split

District Designated Funds (DDF) used for matching in Global Grants

District Designated Funds (DDF) available for District Grants

US$71,483

or approx.

~C$95,000*

(*depends on monthly RI Exchange Rates)

DISTRICT GRANTS – allocating the ~C$95,000

1. **Clubs submit District Grant applications via the Grants module on the D5040 website.**
2. **Applications are reviewed by the District Grants Committee.**
3. **When we reach applications for 80% of the available funds we can submit a spending plan of the approved District Grant applications to the Rotary Foundation.**
4. **We receive back single block grant to fund approved projects.**

   Administered by the District Foundation Committee with more flexible guidelines.

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CREATE HOPE in the WORLD

District Grant Award Statistics

Grant Year	Block Grant Total US $$	Grants Approved Total US $$	Number of Clubs Participating	Number of Grants	Average Grant Award US $$
2013-2014	$66,000	$62,630	16/52	18	$3,479
2014-2015	$53,370	$50,415	11/52	12	$4,201
2015-2016	$64,298	$64,298	16/50	23	$2,796
2016-2017	$66,879	$66,532	19/48	26	$2,559
2017-2018	$66,442	$65,405	13/51	16	$4,088
2018-2019	$51,816	$51,161	10/50	18	$2,842.
2019-2020	$80,262	$80,262	17/50	26	$3,087
2020-2021	$76,139	$76,139	22/49	34	$1,884
2021-2022	$62,079	$62,079	14/49	19	$4,379
2022-2023	$55,138	$55,138	12/49	13	$3,938

Congratulations to these 12 clubs who received a District Grant for the 2022/2023 Rotary Year:

Project Name	Sponsoring Club	Grant Amount CA$
Rotary Shelters at Palm Beach and Van Anda	Powell river	$6,500
Grafton Commons Garden Shed	Bowen Island	$1,000
Community Seniors Outdoor Fitness Stations	Richmond	$8,000
Valley Trail Rotary Viewing Platform	Whistler	$10,000
65th Anniversary tree planting	Ladner	$2,867
Ladner Village Plaza Project	Ladner	$8,288
Squamish Bowling Green Restoration	Squamish	$3,000

Congratulations to these 12 clubs who received a District Grant for the 2021/2022 Rotary Year:

Project Name	Sponsoring Club	Grant Amount CA$
Rotary Community Garden	Prince George Clubs	$10,000
Arua Prison Mattress Project	New Westminster	$3,365
Binners Project – equipment & safety gear	Richmond Sunrise	$2,160
50 Buffalo Bikes for Girls	West Vancouver Sunrise	$3,417
Boulder Climbing Park	Williams Lake Daybreak	$5,000
Pender Harbour community school society	Pender Harbour Madeira Park	$10,000

DISTRICT GRANT PROJECTS

Identify your project
- Community Needs Assessment
- Brain Storm

Plan your project
- Budget
- Implementation
- Partners
- Impact

Apply for a District Grant

If approved receive funding and begin project

Update project information during implementation including photos

Complete final report including impact and receive final funding

Celebrate

Rotary

CREATE HOPE in the WORLD

SUCCESSFUL GRANT PROJECTS

- Meet community needs
- Are sustainable
- Involve members and/or a partner
- Have an implementation plan
- Have a financial management plan

Rotary

CREATE HOPE in the WORLD

Recent Changes and Limits for District Grants

The *District will match $1 of District Designated Funds to each $1 of cash contributions* for club sponsored Projects that:

- create a tangible asset that will have a lasting impact
- are sustainable
- are clearly identified as a Rotary project
- and involve active participation by Rotarians.

The District will match $.50 of District Designated Funds to each $1 of cash contributions for club sponsored Projects that are seen as a contribution to another organization.

Scholarships will no longer be supported by district grants

For any single grant project

- The maximum District Grant funding is $10,000
- The minimum grant will be $1,000.

Subject to the availability of funds

CREATE HOPE in the WORLD

Successful Grant Funded Projects

More of This

Less of This

Rotary

CREATE HOPE in the WORLD

Applying for a District Grant

- Must be done online in the Grants module on the D5040 website.
- Only members who are qualified can apply for and manage District Grants.
- Clubs submitting more than one grant request must rank their requests.
- Projects must NOT start until your application is approved and funds are received from TRF.
- 50% of grant funds released when the block grant is approved and received.
- 50% released when the project is complete and the final report is done and accepted.

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CREATE HOPE in the WORLD

Club Authorization Form

- **Required for each Grant application/project**
- **Signed by Club President**
- **Identifies 3 people involved in the project**
- **Filed in Documents section of the Grant Application**

Rotary
District 5040

District Grant Club Authorization Form

Rotary Club:

Year:

Project Name:

We hereby authorize our club to apply for a district grant and agree to enter all project tracking information along with a final completion report on the District 5040 website.

Club President:

Grant Applicant:

Please enter the names of at least three club members who are on the project committee:

1)

2)

3)

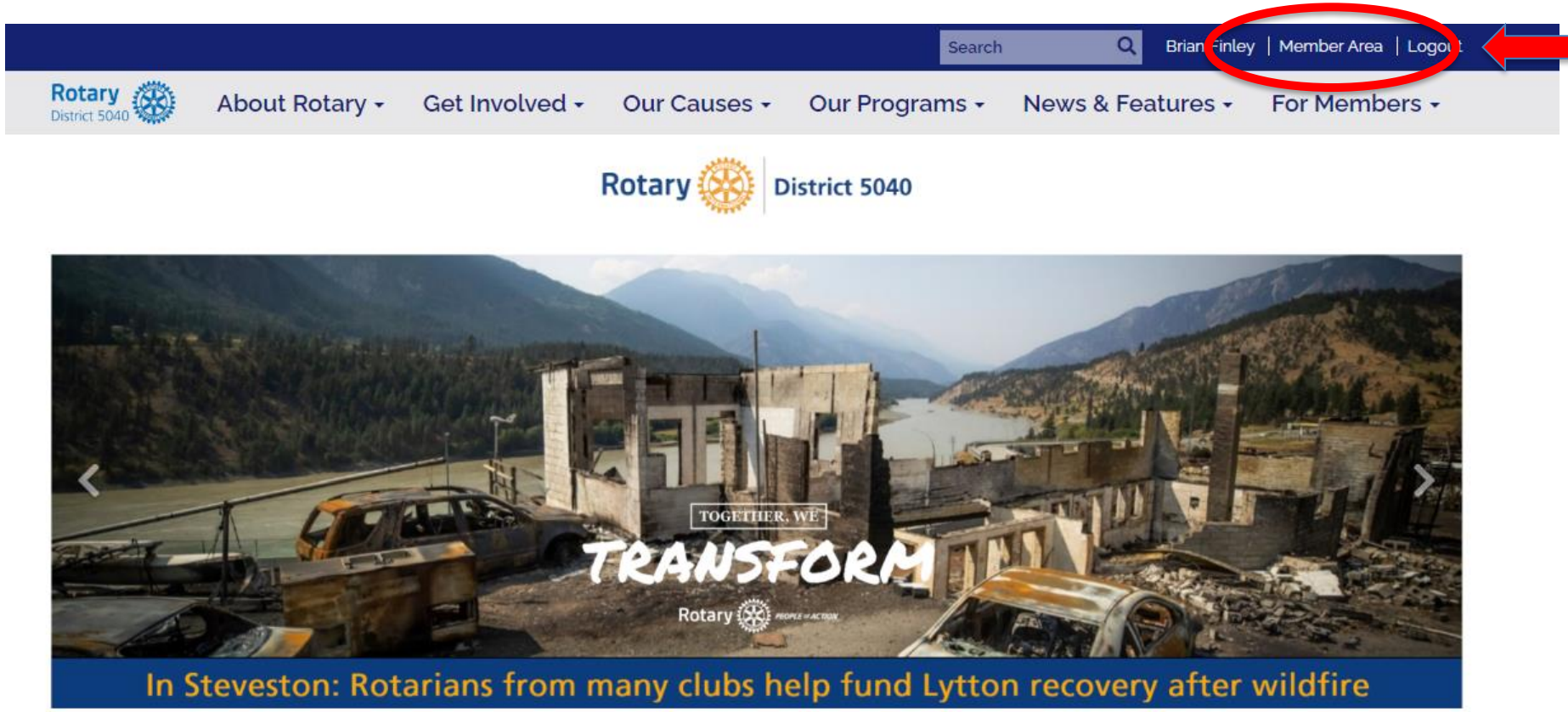
Project Example

Budget:	**$20,000**
Funding:	
• **Club funds**	**$10,000**
• **District Grant**	**$ 5,000**
• **3rd Party Donations**	**$ 5,000**
	$20,000

Rotary

CREATE HOPE in the WORLD

Starting a District Grant



First, login to the 5040 website & go to Member Area

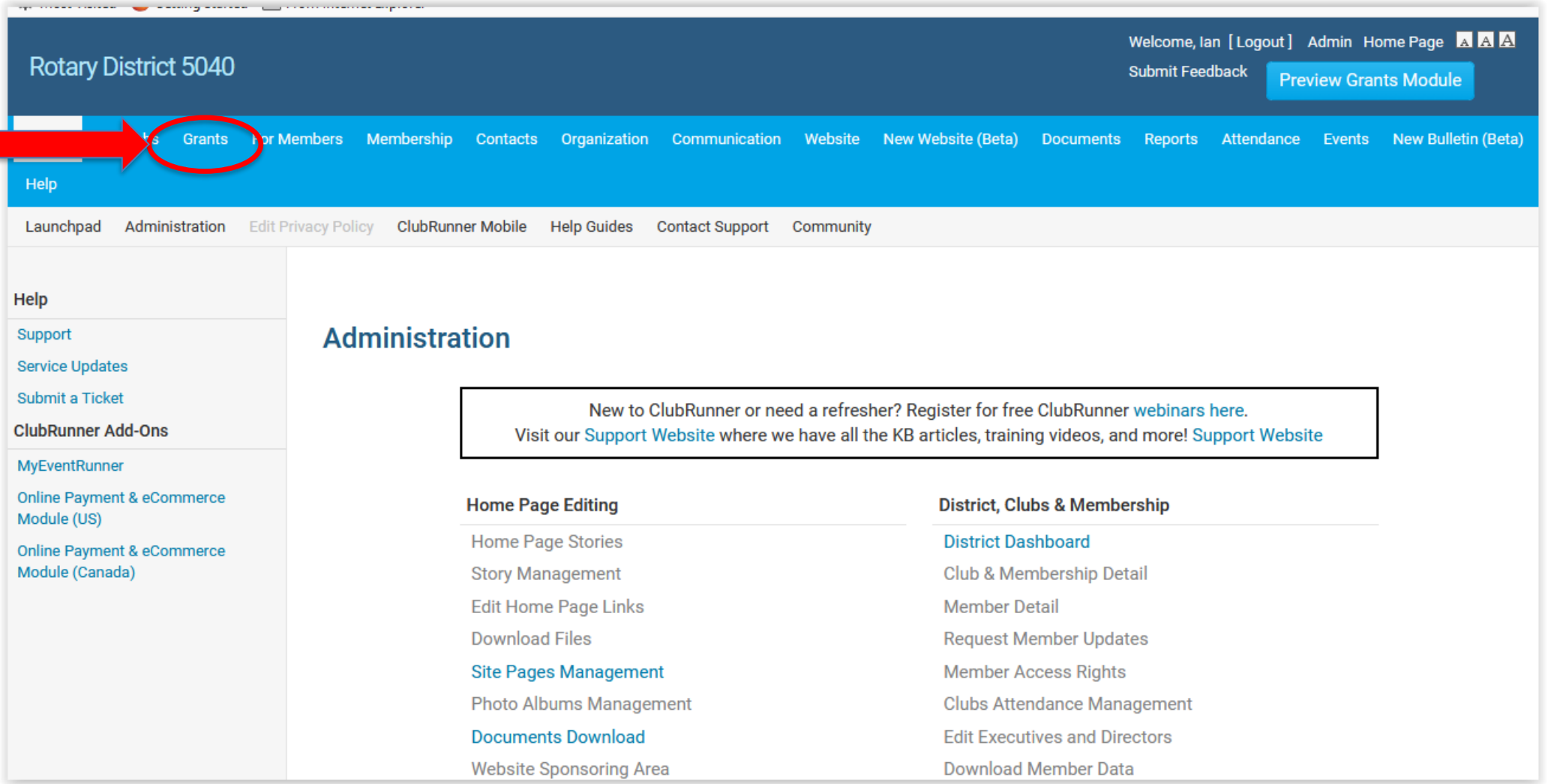
Your login is the same one you use for logging into your club's site

5040

CREATE HOPE in the WORLD

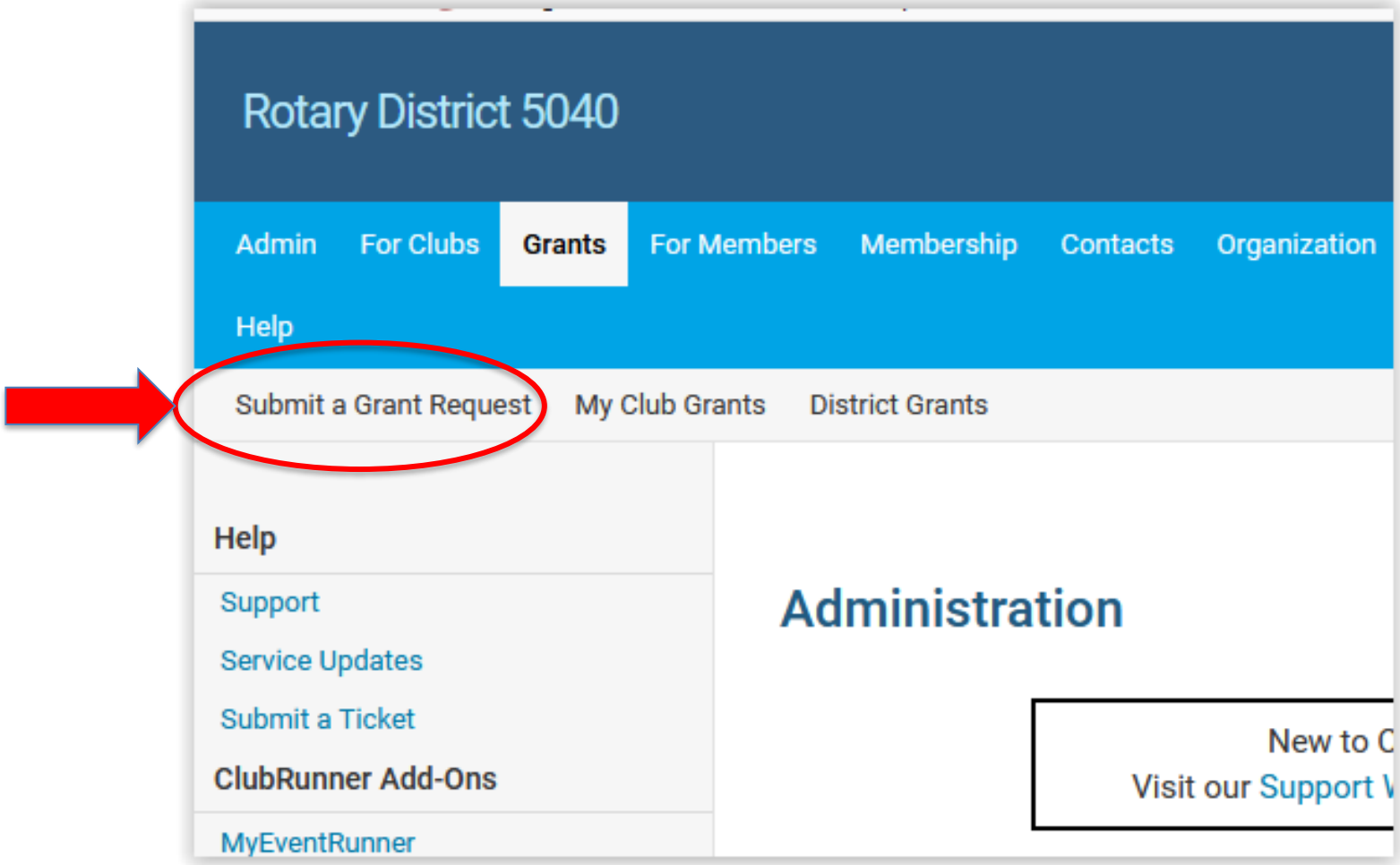
Starting a District Grant

Click on Grants



Step 1. Starting a District Grant

To start a district grant, click on submit a grant request, after you have started entering a grant you will be able to return to it by clicking on My Club Grants

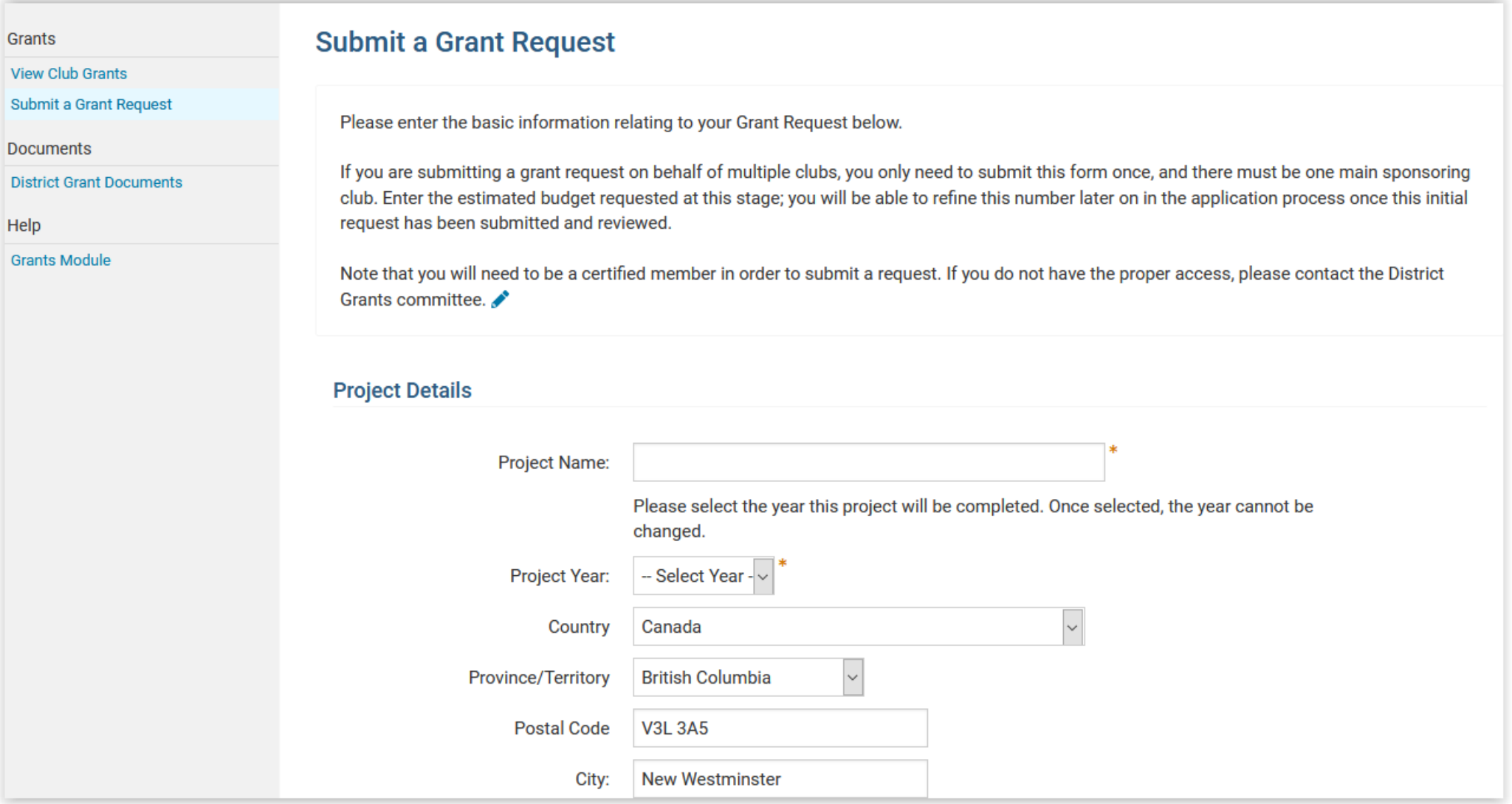


Step 1. Starting a District Grant

Your club must have a signed MOU and you have to have taken this session in order for the system to allow you to enter a grant

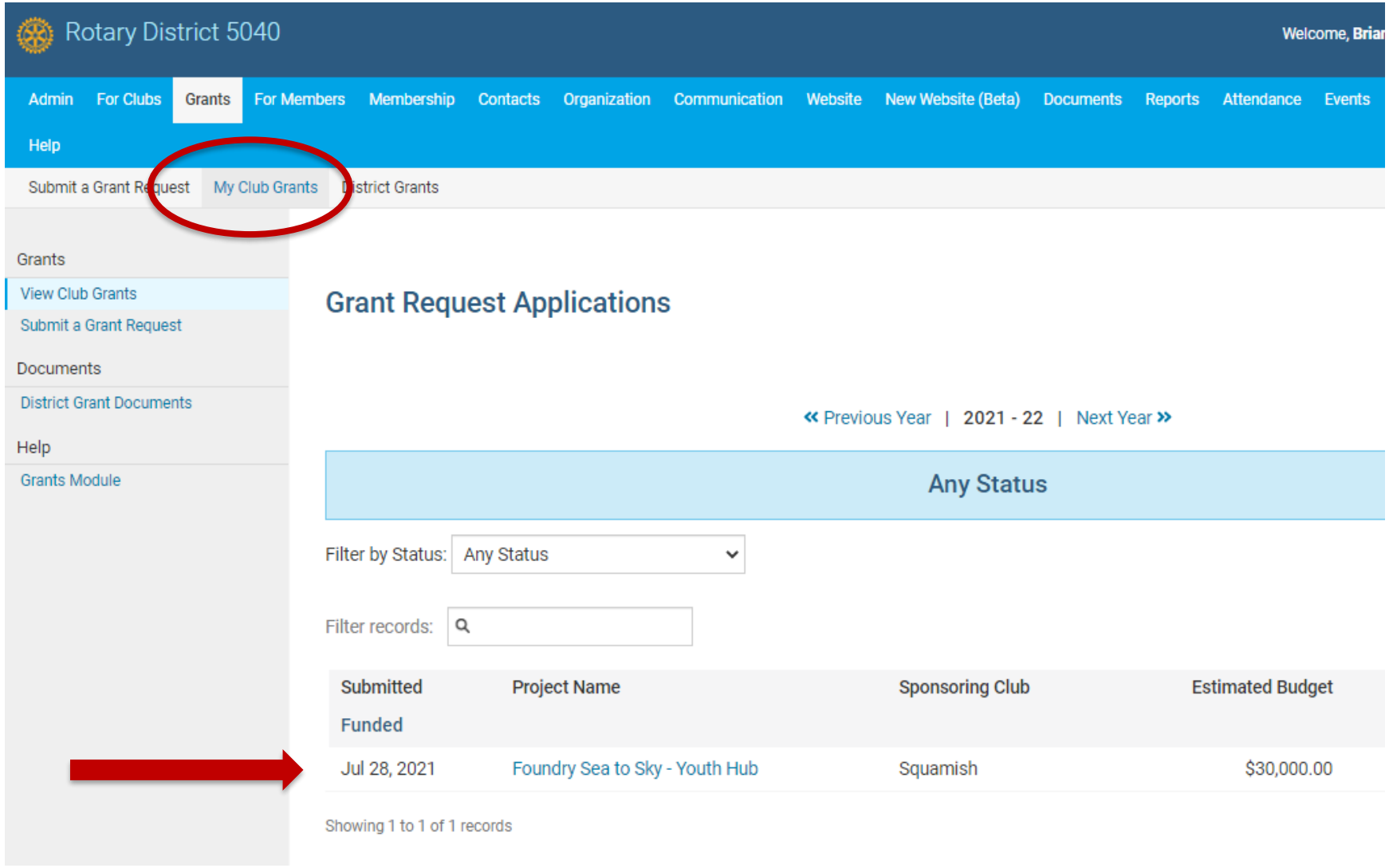
At this stage you enter

- Project name & description
- Location
- Budget



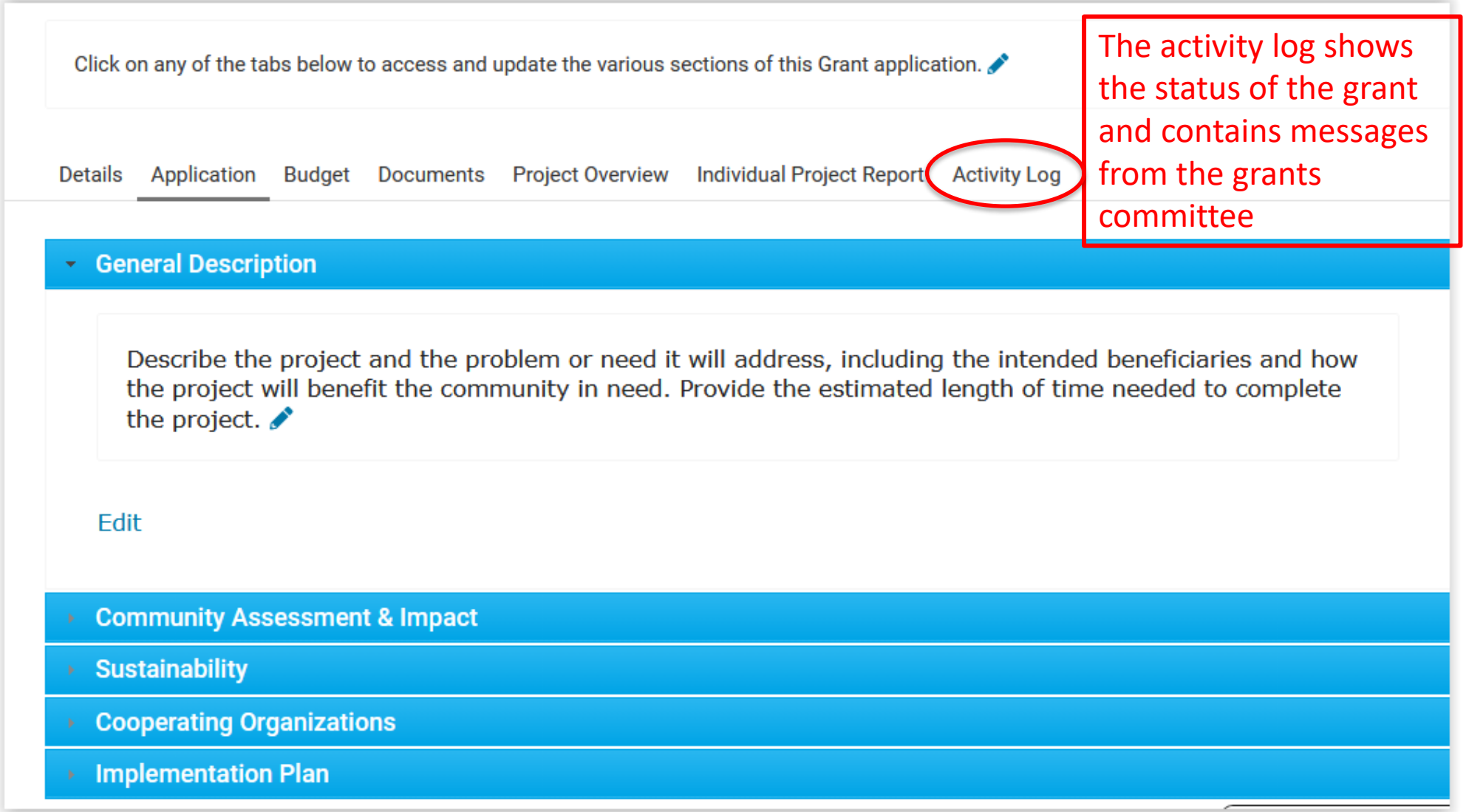
Step 2. Entering Information for a District Grant

If your initial grant request meets overall guidelines you will receive a request for more information message.



Step 2. Entering Information for a District Grant

Opening your grant will give you this page where you fill in the project details. The tabs allow you to enter the budget, store documents and do a final report of how the project went.

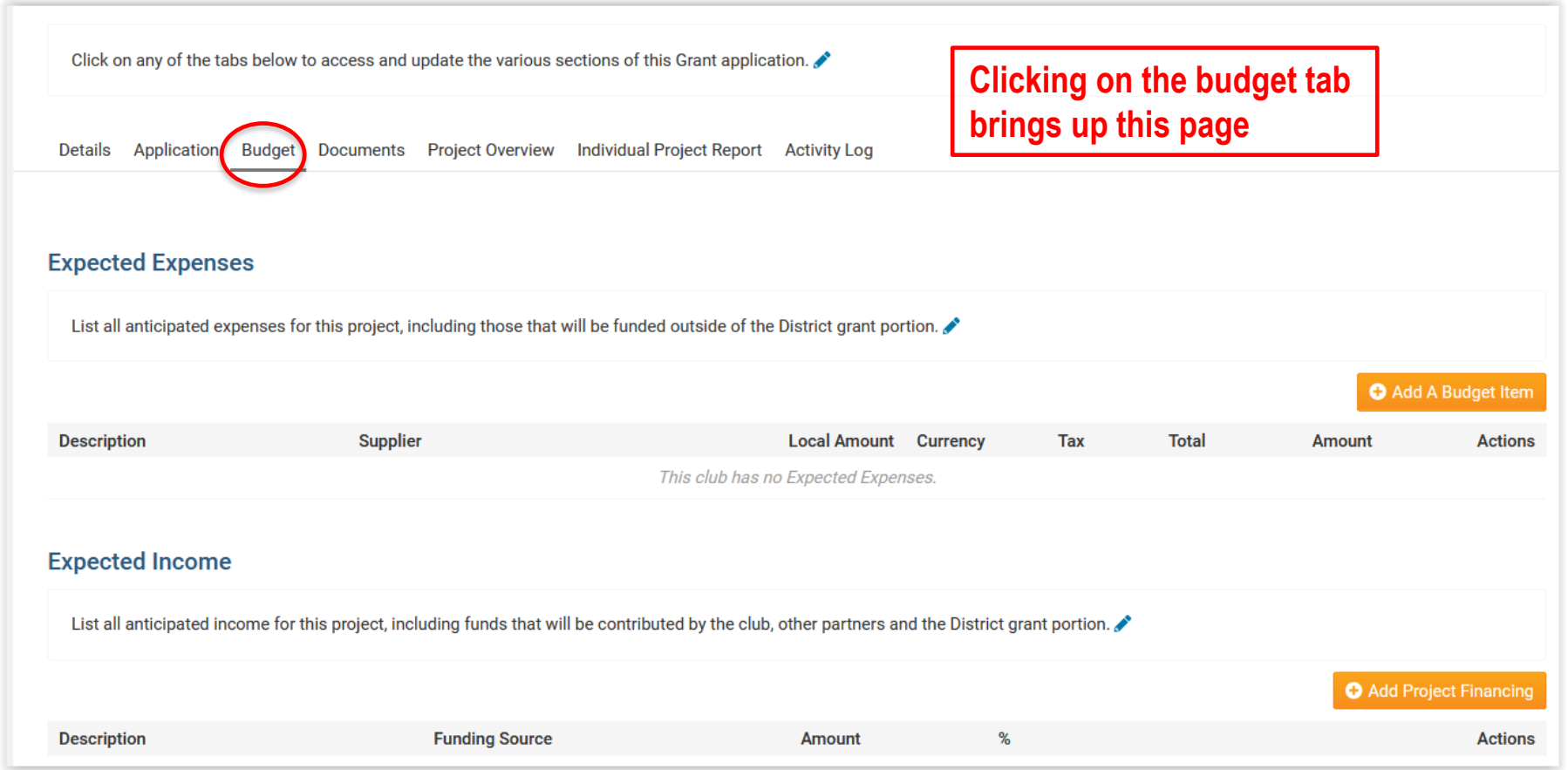


The activity log shows the status of the grant and contains messages from the grants committee

Entering the Project Budget

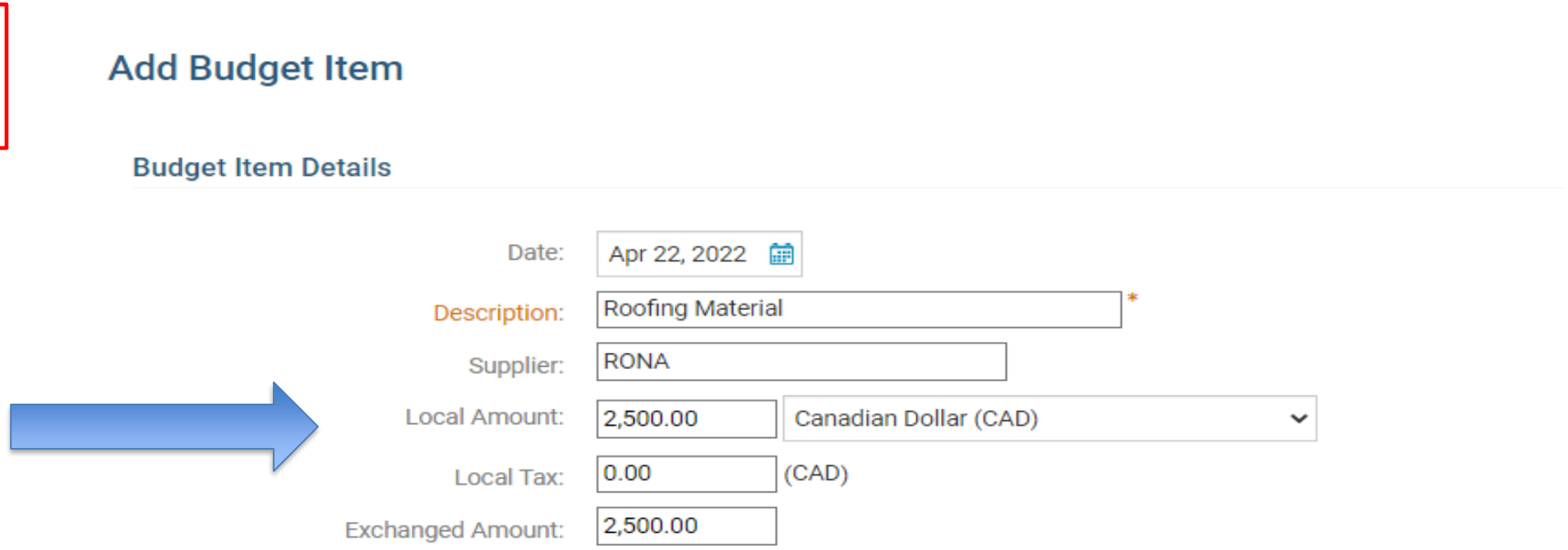
Enter each expense item

Enter all sources of income, club generated funds, partner funding. This is also where you enter your grant request amount

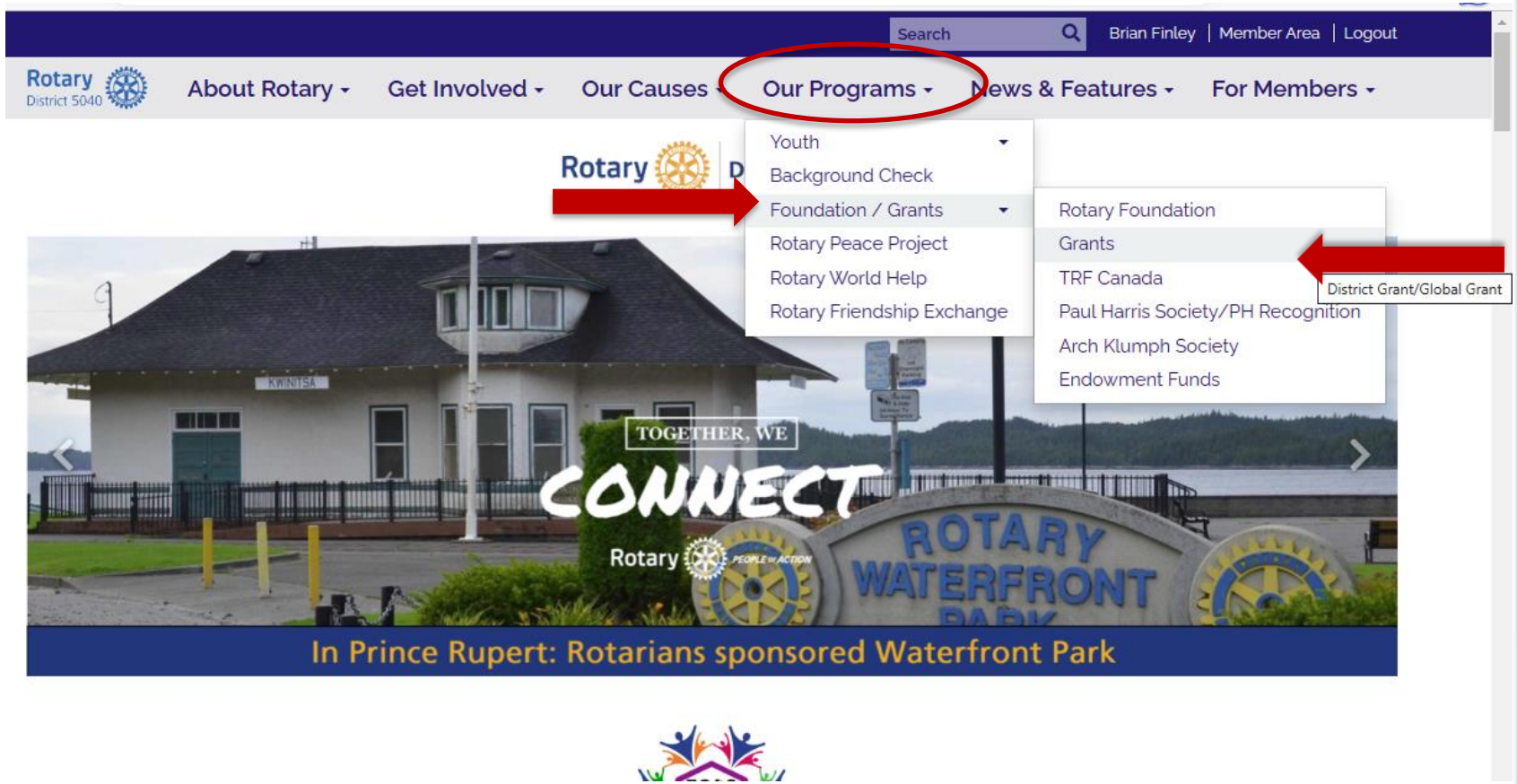


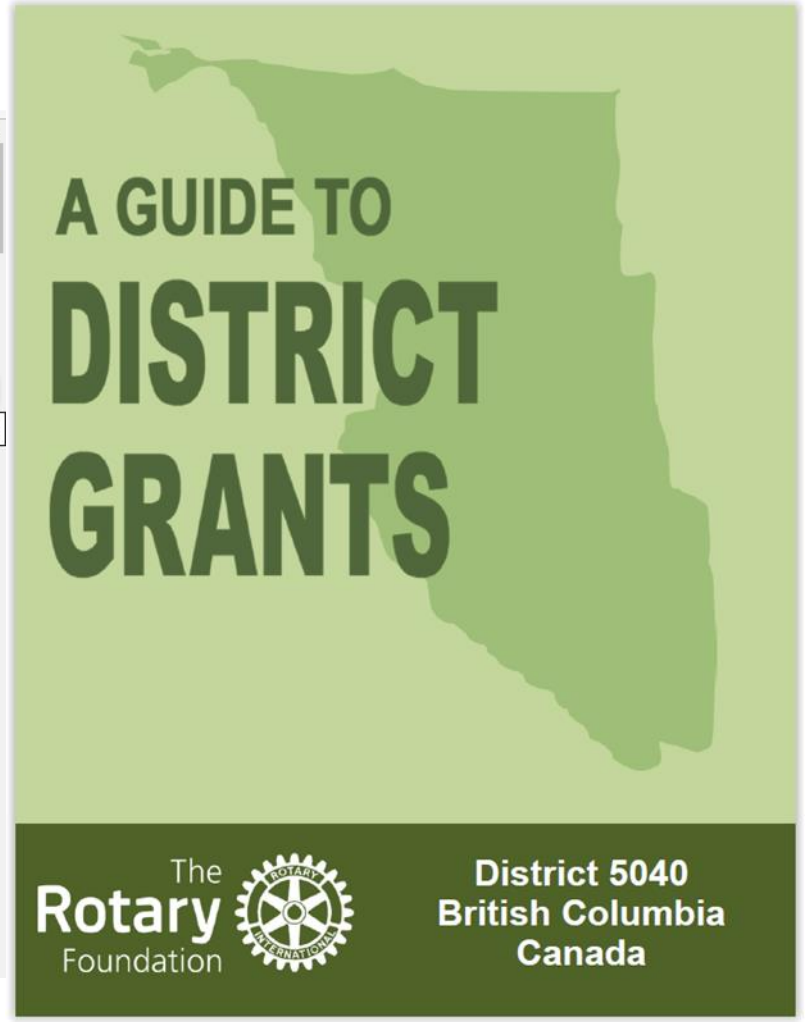
Use Canadian Dollars for all items entered

The system default is $US. Enter and track all funds in Canadian dollars.



Finding Information on Grants





District GRANTS Committee Review - T&Cs District Grants

District Grants CAN NOT be used to fund:

1. **Continuous or excessive support of any one beneficiary, entity, or community**
2. **The establishment of a foundation, permanent trust, or long-term interest-bearing account.**
3. **The purchase of land or buildings**
4. **Fundraising activities**
5. **Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities**
6. **Public relations initiatives, unless they are essential to carrying out the project**
7. **Project signage that cost more than $1,000**
8. **The operating, administrative, or indirect program expenses of another organization**
9. **Rotary Youth Exchange, RYLA**
10. **Scholarships**

District GRANTS Committee Review

District grant requests will be processed in the order they are received.

Early submission does not guarantee receiving a grant.

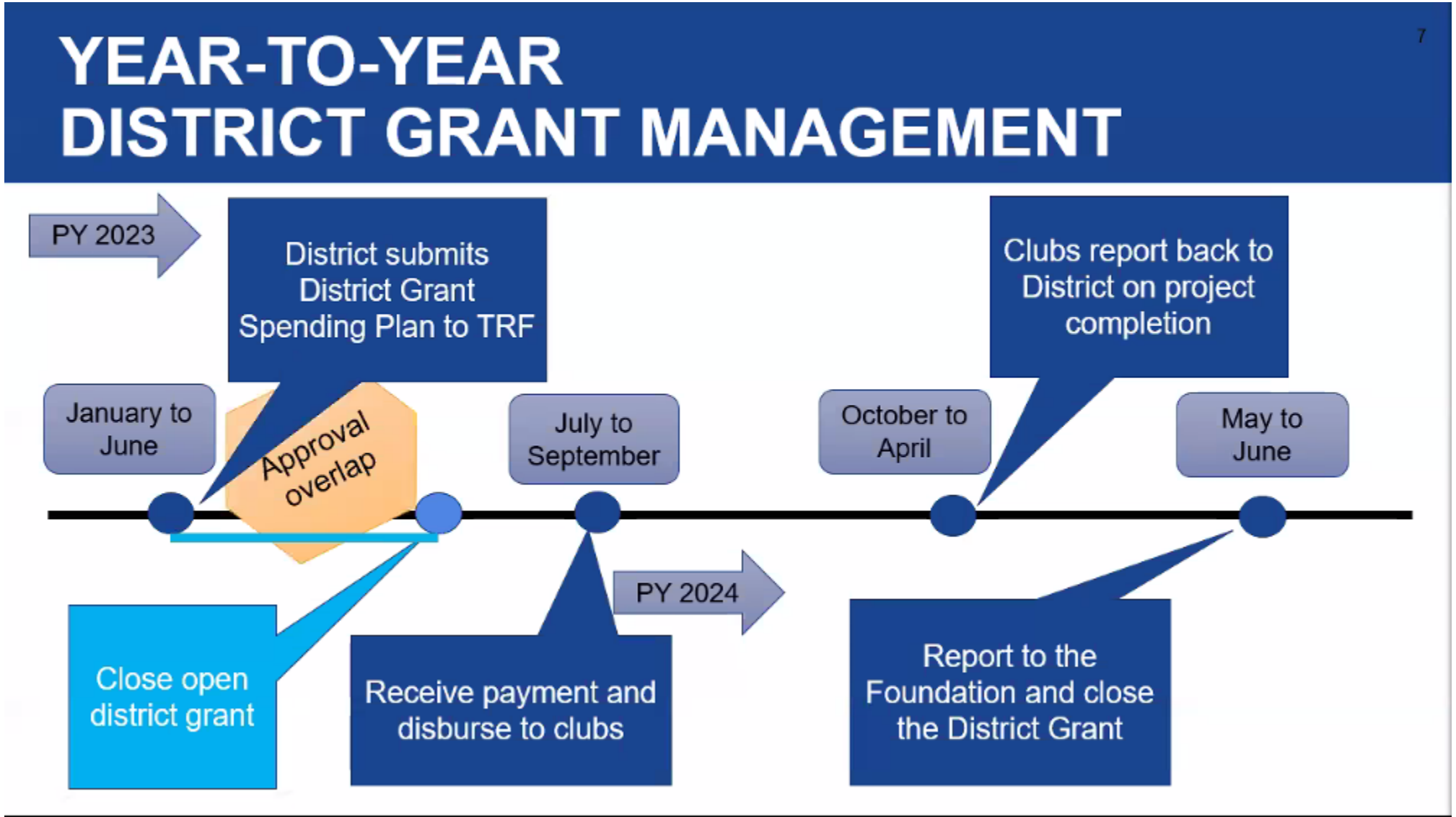
The committee considers the following criteria:

- Does the project meet all District Grant Guidelines?
- Has the club contributed to the Foundation annual fund in the past 3 years?
- Multiple grant applications must be ranked.
- Does the club have any outstanding projects (no final report)?
- The impact and sustainability of the project.
- Has the club received a grant in the past year?

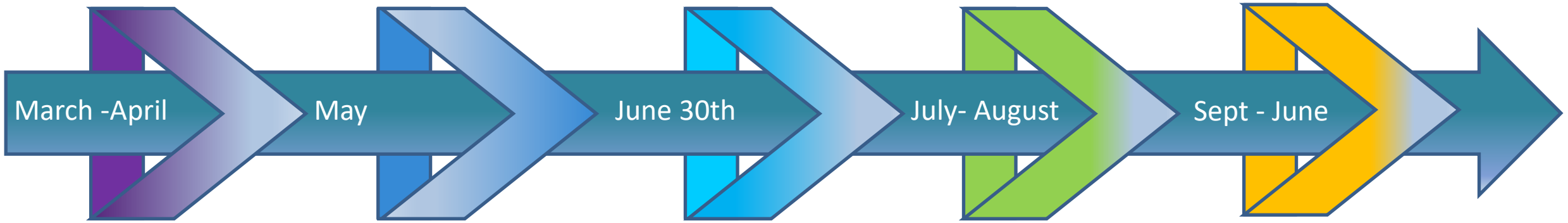
Rotary

CREATE HOPE in the WORLD

The Rotary Foundation Timeline



District 5040 Grants Timeline is Changing.



- District grants training
- Applications open

- MOU's signed and submitted

- District grant applications close

- Approved projects are submitted in spending plan
- Funds distributed

- Projects are completed
- Final reports are filed and final funds distributed

Rotary

CREATE HOPE in the WORLD

KEY Messages – District Grants

- **District Grants can help fund your projects and increase the impact in your communities.**
- **Plan your projects and submit your applications ASAP.**
- **The best projects engage club members, have a high impact and visibility, and are sustainable.**

Rotary

CREATE HOPE in the WORLD

Discussion & Questions

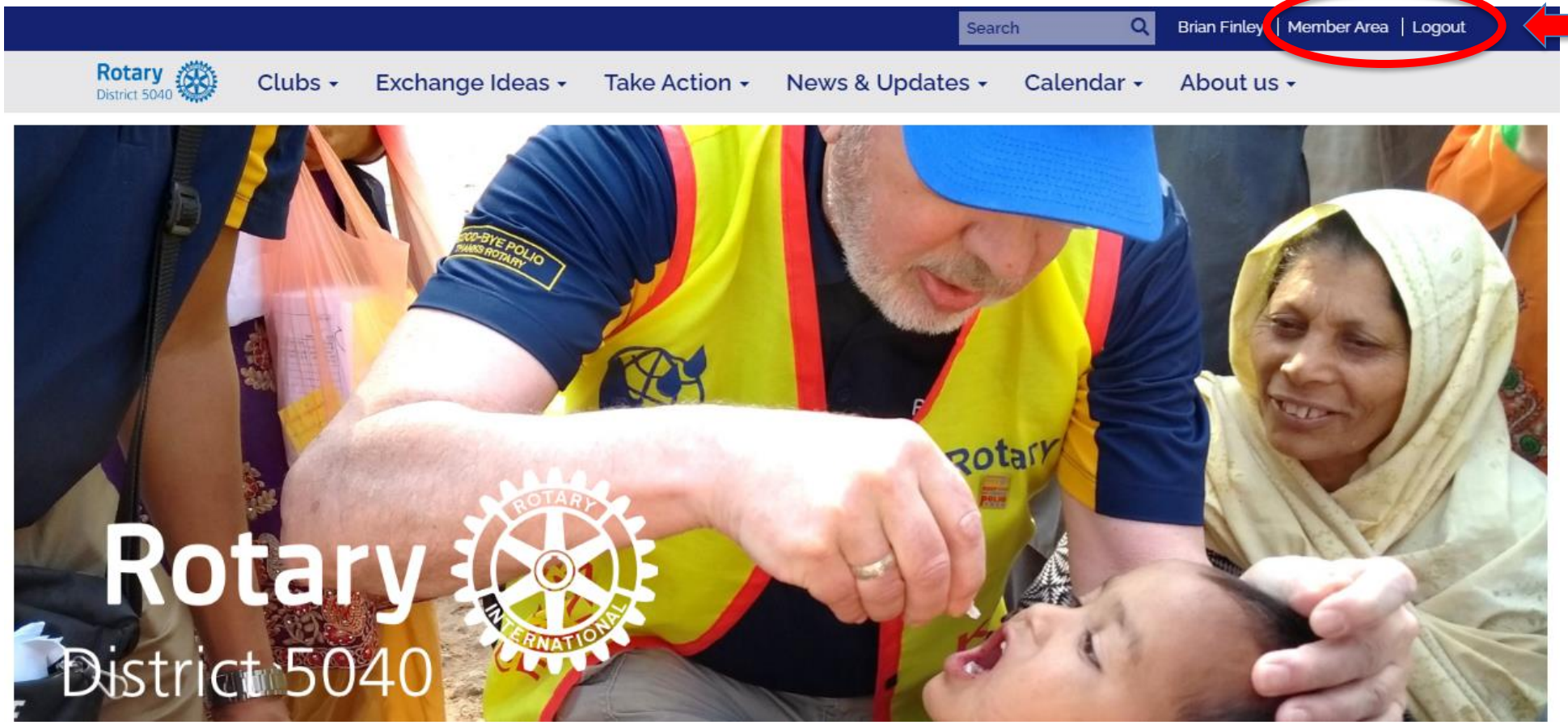
District 5040 Grants Timeline

March 2023	PE's start planning projects
March 2023	District Grants Training
April 3, 2023	Applications Open
By end of May 2023	Signed MOU's submitted
June 30th 2023 ★	Applications Close subject to having reached 80% of the funds available.
July 2023	The proposed spending plan based on approved grants is submitted to TRF
July-August 2023	Receive TRF approval for spending plan followed shortly thereafter by funds received by District
July-August 2023	District distributes 50% of funds to clubs (Clubs may apply for hardship consideration)
Sept 2023-June 2024	Clubs enter final report information on-line and receive final funds

Rotary

IMAGINE ROTARY

Starting a District Grant



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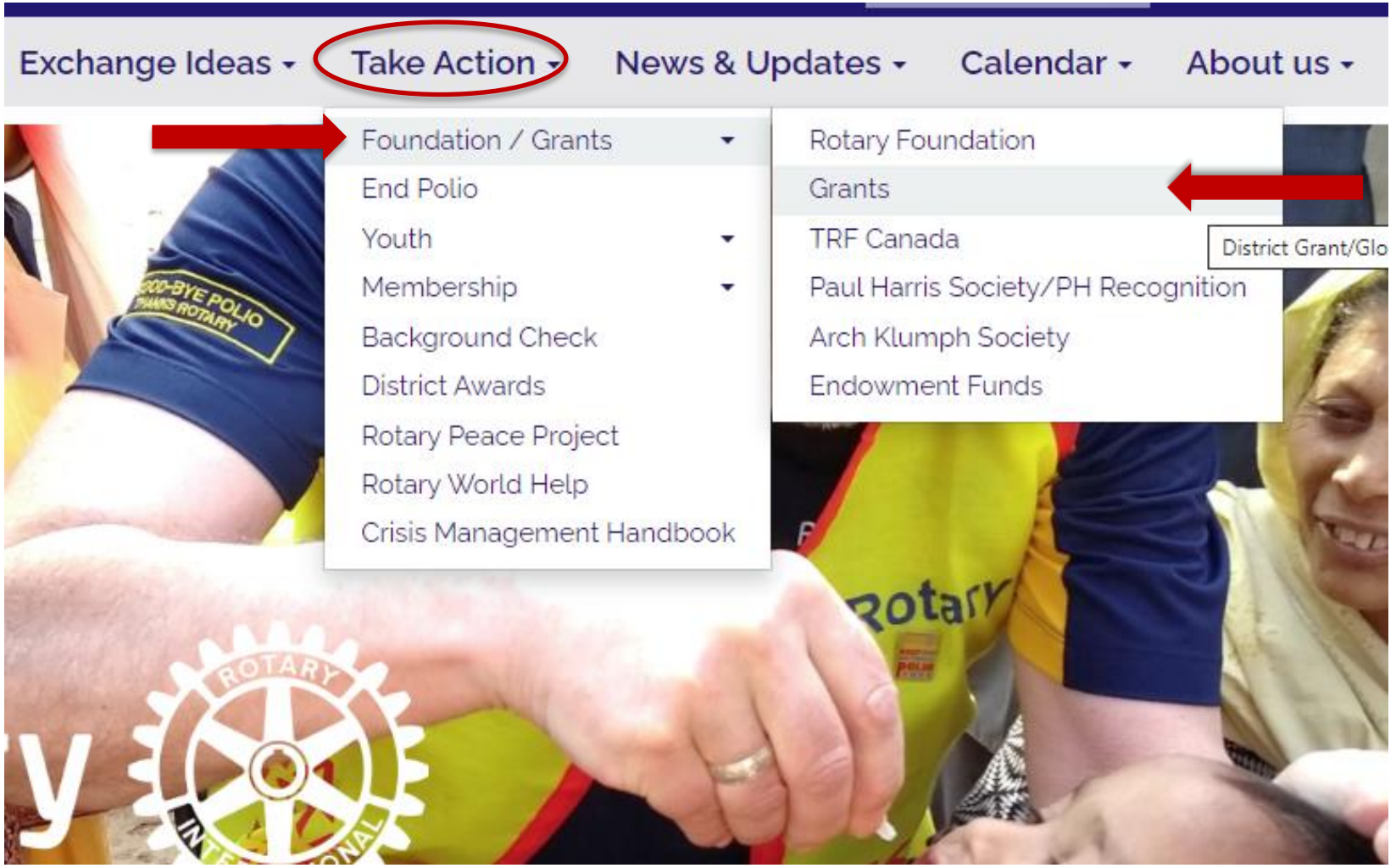

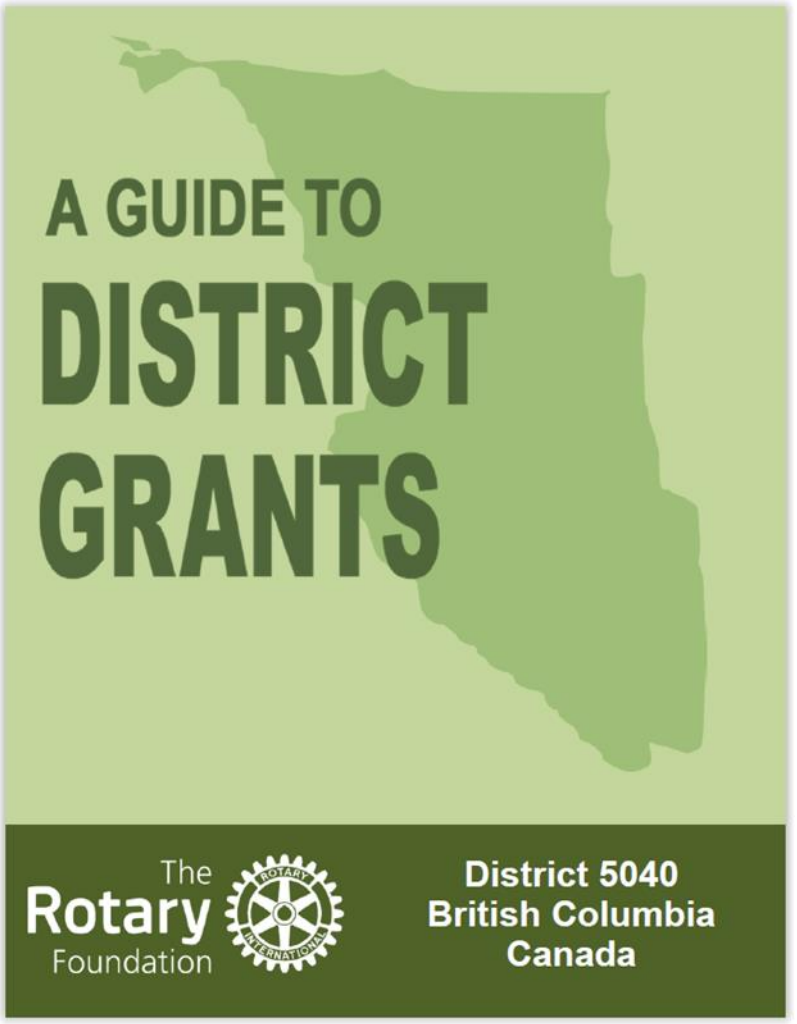

Video Training Module

There is a very useful training video on how to use the ClubRunner District Grants Module

It is on the District 5040 site under District Grants, How to enter a District Grant, you can also find it through the Guide to District Grants

KEY MESSAGES- District Grant

- **District grants are not approved on a first come first serve basis**
- **Limited $$$ and want to maximize our impact within the District**
- **Priority will be given to District Community Projects versus global projects but smaller global projects do qualify**
- Priority will be given to clubs who have made the foundation a priority and have given to the annual program fund- share over the last 3 years
- **Priority will be given to projects with HIGH participation/ HIGH engagement, HIGH IMPACT and/or HIGH visibility/media coverage**
- All District Grant applications should respond to a community need and at least one of the seven areas of focus

Rotary

IMAGINE ROTARY

D5040 District Grants Training Seminar 2023-24

Agenda

- **Introduction:** Ian Grant, vice-Chair Rotary Foundation
- **Grants Training:** Brian Finley, Chair District Grants

The Rotary Foundation

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