

District 5050 Grant Management Manual

District Grant Criteria

- The District Grant Committee shall consider the following criteria in awarding District Grants to clubs:
- The Project should support the mission of The Rotary Foundation with reference to the Six Areas of Focus.
- Proposals should request a District Grant amount from a minimum of \$500 to a maximum of \$10,000.
- District Funds will be used to match Club Funds, usually with a minimum of 50 cents per US dollar to a maximum of 1:1 US dollars. The amount of the matching grant will depend upon the availability of funds and the total number of grant requests received. The Foundation Chair may use discretion in determining the final matching amount.
- The Project can be of a short-term or a long-term duration (but not longer than eighteen months).
- The Project can be either local or international.
- Active Rotarian participation in the Project is expected.
- District Grants that require one-time training to accomplish the project may use grant funds to pay for that limited training. No established or on-going salary is eligible.
- District Grants may fund building a "simple school building" – check terms under Global Grants 2019.
- District Grants may fund an inside remodel of a school room if the building has been occupied for 1 year or longer.
- Projects must adhere to any terms and conditions of The Rotary Foundation, Rotary District 5050 and the District Grant Committee.

Club Qualification and Grant Terms

- Each club must attend a District Foundation Grant Management Seminar training session each year.
- Unless an exception is allowed in advance of the Grant Management Seminars by either the District Governor or the Governor-Elect, two members of each Rotary club must attend the seminar, of which one must be the President-Elect.
- The President-Elect plus another member in good standing, on behalf of the Rotary Club, must read and sign a District 5050 Memorandum of Understanding (MOU) and submit a copy to the District Foundation Chair.
- The Rotary Club must have demonstrated financial support for the Rotary Foundation by making contributions to the Annual Programs Fund in at least one of the preceding two years.
- No Rotary Club may apply for subsequent District or Global grants until reinstated by the District Governor if it has been delinquent for more than 90 days in meeting any reporting requirements of The Rotary Foundation or Rotary District 5050, or delinquent for any other reason (including payment of dues or debts).

Grant Application

- The full application is to be submitted by use of the District Grants Module on the District 5050 website.
- Grant Applications can only be submitted with the approval of the Board of the applying Rotary Club.
- The Rotary Club must complete the Project no later than eighteen months from the final approved application date.
- Clubs must submit an interim report at twelve months following final approval if the project has not been completed by that date. A final report with full documentation is required at the completion of each project.
- District Grants have a life time of 18 months. If a project requires more time due to extenuating circumstances, a 30-day grace period MAY be allowed with permission from the District Foundation Chair.
- District Grants that cannot finish or fail to file timely required 12-month progress and 18-month final reports are required to refund their grant funds.

- Clubs can submit more than one grant request at a time but must prioritize their requests.
- The District Grant Committee can only approve matching grants up to the total available funds available for that year. If there are insufficient funds for all Applications, the District Grant Committee may reduce the ratio of the matching funds for one or more Applications as the Committee decides appropriate.
- Due to high demand for district grants that benefit many, District 5050 will not fund scholarships with District Grants until such time that we find funds exceed grant requests.
- District Grants that repeat the same grant project in the same city, village, or park will be declined.
- Funds will be turned over to the Rotary Club upon approval of their FINAL Application. Accordingly, the Rotary Club will be held to a high level of accountability and stewardship of these funds.
- As stated in the prior section, any Rotary Club failing to meet its project reporting requirements or being delinquent for any reason will lose its qualification and be ineligible for further District or Global Grant funds until reinstated by the District Governor.

Appointment of Club Project Committee

- Each sponsoring Rotary Club will form a Project Committee of at least three Rotarians.
- The Rotary Club shall designate one primary contact to be responsible for all grant-related correspondence with the District Grant Committee and/or The Rotary Foundation.
- It is the responsibility of any current club president and grant writer to be informed on any new grant rule changes during the life of their club grant.

Budget

- The Rotary Club must create a Project Budget which is to take into account the goals of the Project and the fundraising resources of the Rotary Club.
- A preliminary budget is to be submitted with the initial Application and should state the amount of District Grant funds being requested.
- If the initial Application is approved, a detailed, line-item budget is to be submitted with the full Application.
- Non-Rotarian cash contributions are acceptable for matching District Grant funds, provided that the contributions do not come from a cooperating organization taking part in the Project, or from a beneficiary of the Project.

Bank Account and Document Retention

- Each club must maintain a club-controlled separate bank account that is used solely for receiving and distributing grant funds.
- Each account will require at least two signatures with one being the Rotary Club Treasurer.
- Each open Grant must have its own separate account.
- The Rotary Club must maintain detailed records and receipts of each grant project.
- The Rotary Club must ensure that it complies with the Memorandum of Understanding, the Grant guidelines from both the Rotary Foundation and the District Grant Committee, with all local laws, and with standard accounting practices.
- The accounts and records of the Project are subject to oversight, review or audit by The Rotary Foundation, the District Grant Committee, and/or the District Stewardship Committee at any time, and by the District Financial Review Committee after the completion of the Project.
- The Rotary Club shall provide copies or originals of any documentation or information upon a request being made by The Rotary Foundation and/or the aforementioned committees.