

## District 5390 Grant Guidelines

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### **District Grants Overview**

District Grants are funded by The Rotary Foundation (TRF) solely with allocations from the District Designated Funds (DDF). The DDF equals half of the total Foundation Annual Fund giving from all Rotary clubs in District 5390. A Rotary District may use up to fifty percent of the DDF from three years prior for District Grants each year. The percentage of District Designated Funds, set aside for District Grants, is determined by the District Foundation Committee each year.

The Rotary District 5390 Foundation Committee appoints a District Grant Selection Chairperson to oversee the process for which the district grant funds get awarded among clubs. Subsequently, the District Grants Selection Committee accepts applications from clubs and awards grants for qualifying projects. Remember, "Every Rotarian Every Year", as this is the funding that will be returned to our District for Grants in the form of District Designated Funds.

All club requests for District Grant Projects, including supporting documentation, grant reports, and club qualification documents, must be submitted through the District Grant Website ([www.MatchingGrants.org](http://www.MatchingGrants.org)) in order to obtain any matching DDF.

Global Grants must be initiated at the District level using the application form on District 5390 website ([www.montanarotary.org](http://www.montanarotary.org)) in order to get any Global DDF. Global Grant applications may be submitted online to TRF ([www.rotary.org](http://www.rotary.org)) at any time during the Rotary year. Clubs must be qualified by the District to obtain Global DDF using the same criteria and process as District Grants (District Grant Website). The club qualification year for Global Grants is April 1<sup>st</sup> - March 31<sup>st</sup>.

### **Guidelines for District Grant Awards**

Rotary District Grants may support a wide variety of humanitarian and educational activities in local communities and in other countries. During the District Grant Application evaluation, the District Grants Selection Committee will take into consideration the scope of impact of the proposed project as to fairly distribute grant funds for qualifying projects.

**All projects and activities funded by District Grants must:**

- Relate to the mission of The Rotary Foundation, which is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty
- Rotarian Participation: All projects must involve active club participation in the initiation, planning, organizing, managing, supervising, and/or performance of the work of the project. Projects that are initiated and implemented by 3<sup>rd</sup> party organizations as part of their programs, and for which Rotary involvement consists primarily of donating funds, will not be eligible. Your application needs to state your club's involvement, list volunteer hours as part of the budget submitted, and again in the final progress report.
- Must be a Rotary Club Project and follow the Rotary 'Areas of Focus Policy Statements'. If part of a larger project, Rotary Club must own the part they are requesting funding for
- Exclude any liability to The Rotary Foundation or Rotary International except for the funding amount of the grant
- Adhere to the governing laws of the United States and the country where the activity is taking place and not harm individuals or entities
- Only fund activities that have been reviewed and approved before their implementation. Grants will not be approved to reimburse clubs or districts for projects already completed or projects already in progress at time of grant application. Planning for grant activities ahead of approval is allowed and encouraged, but expenses may not be incurred prior to grant approval
- Demonstrate sensitivity toward another country/geographic region's traditions and culture, if grant activities will take place outside of the grant recipient's country/geographic region
- Comply with the Conflict of Interest Policy for Program Participants as outlined in section 30.040 of The Rotary Foundation Code of Policies  
(<https://my.rotary.org/en/document/rotary-foundation-code-policies>)
- Comply with the policy regarding the proper use of Rotary Foundation Marks and Recognition Plaque for TRF Funded Projects, as outlined in section 40.010.1 and 40.010.2 of The Rotary Foundation Code of Policies  
(<https://my.rotary.org/en/document/rotary-foundation-code-policies>)

### **Under the Rotary Foundation Code Policies, District Grants can Fund:**

(Most Information taken from The Rotary Foundation Code of Policies, which can be found at:

<https://my.rotary.org/en/document/rotary-foundation-code-policies>)

- Humanitarian projects
- Support local and international projects, scholarships, vocational training teams, and related travel
- May fund scholar and vocational training team orientation and grant management seminars

- May pay for travel to and participation in Rotary project fairs to help clubs and districts find partners
- Fund projects and activities both in countries where Rotary has clubs and in areas where we do not, and in geographic areas where permitted by law and in accordance with Foundation policies.
- Projects used in collaboration projects with Rotaract, Youth Exchange, and Interact.

### **Under the Rotary Foundation Code Policies, in addition to the District Grants listing, Global Grants can Fund:**

(Most Information taken from The Rotary Foundation Code of Policies, which can be found at:

<https://my.rotary.org/en/document/rotary-foundation-code-policies>)

- Support activities that align with one or more of Rotary's six areas of focus. These activities include humanitarian projects, international scholarships to fund graduate-level coursework or research for one to four academic years, and/or vocational training teams that address a humanitarian need by providing professional training.
- Benefit communities in countries and geographical areas where Rotary has clubs
- Are based on the needs of the community where a project will be carried out. Any club or district that applies for a global grant to support a humanitarian project or a vocational training team needs to conduct a community assessment and design the project with the host community in response to the results. Sponsors must also include the results in the grant application.
- Are sponsored by at least one Rotary club or district in the country where the grant project will take place (the primary host sponsor) and one or more outside that country (the primary international sponsor). TRF may make exceptions for projects in countries where Rotary doesn't have clubs but where Rotary International's Board is actively pursuing extension.
- Are sustainable. Communities where a project is carried out must be able to address their own needs after the Rotary club or district has completed its work.
- Are measurable. Sponsors select standard measures from the Global Grant Monitoring and Evaluation Plan Supplement, and may add their own measurements.
- May fund the building of low-cost shelters and simple schools, as long as the construction is part of a comprehensive project related to an area of focus. They can also be used to build infrastructure, such as toilet blocks and sanitation systems; access roads; dams; bridges; storage units; fences and security systems; water or irrigation systems; and greenhouses. If your project will access groundwater, you need to have done a hydrogeological survey. The cost of that can be included in the grant budget.

- Support international travel for up to two people as part of a humanitarian project. These people provide training or implement the project if the local Rotary club confirms that those skills aren't readily available locally

## **Grant Restrictions**

Grants cannot be used to unfairly discriminate against any group, promote a particular political or religious viewpoint, support purely religious functions and churches and other places of worship, support activities that involve abortion or that are undertaken solely for sex determination, fund the purchase of arms or ammunition, or as a new contribution to the Foundation or another Rotary Foundation grant. Our District supports new ideas and projects annually. Clubs repeating the same project are not supported by the District Grant process.

### **In addition, District Grants cannot fund:**

(Most Information taken from The Rotary Foundation Code of Policies, which can be found at:

<https://my.rotary.org/en/document/rotary-foundation-code-policies>)

- Continuous or excessive support of any one beneficiary, entity, or community
- Establishment of a foundation, permanent trust, or long-term interest-bearing account. Grant funds can be used to establish a microcredit fund if the sponsors comply with the requirements detailed in section X.
- Purchase of land or buildings
- Fundraising activities
- Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities
- Public relations initiatives, unless they are essential to carrying out the project
- Project signs that cost more than \$1,000
- The operating, administrative, or indirect program expenses of another organization, with the exception of expenses allowed within the project management allocation for global grants
- Unrestricted cash donations to a beneficiary or cooperating organization
- Activities for which the cost has already been incurred
- Transportation of vaccines over national borders without prior approval of appropriate government and regulatory authorities in the originating and recipient countries
- Travel to National Immunization Days
- Immunizations that consist solely of the polio vaccine
- Study at a university that hosts a Rotary Peace Center in the same or similar academic program as Rotary

## **In addition, Global Grants cannot fund:**

(Most Information taken from The Rotary Foundation Code of Policies, which can be found at:

<https://my.rotary.org/en/document/rotary-foundation-code-policies>)

- Rotary Youth Exchange, RYLA, Rotary Friendship Exchange, Rotaract, or Interact programs
- International travel for people under age 18, unless they are accompanied by a parent or guardian
- New construction of any permanent structure in which people live, work, or spend a significant amount of time, such as hospitals or container and mobile homes, or of structures in which people carry out activities such as manufacturing and processing. If the grant depends on the construction of a building, the construction must be funded by additional club or district funds. This restriction doesn't apply to lowcost shelters and simple schools.
- Renovations to complete buildings that are partially constructed (including those with only the exterior completed) but that have never been occupied or operational
- Travel for staff of a cooperating organization involved in a humanitarian project
- Activities primarily carried out by an organization other than Rotary
- Humanitarian projects that are primarily research-oriented or focused on data collection
- Humanitarian projects that consist solely of individual travel expenses
- Undergraduate studies, such as for a bachelor's degree
- Multiple unrelated projects under one grant

## **District Grants Process & Timeline**

1. Clubs must be qualified in order to receive grants.
  - Please see the Memorandum of Understanding (MOU) for a complete list of qualification requirements. Qualification requirements must be completed, uploaded, and signed by January 31<sup>st</sup>.
2. Submit District Grant application(s) for the upcoming Rotary year to the District Grant Selection Committee using the District Grant Website ([www.MatchingGrants.org](http://www.MatchingGrants.org)).
  - The deadline for applications is March 31<sup>st</sup> of any given year for the upcoming Rotary Year grant cycle.
  - Grant requests can be submitted for any amount between \$500 and \$2,500. Clubs can apply for up to \$5,000 with the understanding that only the first \$2,500 will be awarded unless there are excess funds available.
  - Grant Awards are not guaranteed to be the full requested amount

- Order in which grant requests are reviewed are the First Priority Grant Requests, and secondly, if Grant Funds remain, additional requests in order of Priority request (Second, Third, etc.). If there are still any additional funds available, they will be distributed evenly to those clubs requesting >\$2,500.
  - Clubs can still apply for grants for the upcoming Rotary year if they have not submitted a Final Report for a grant received during the previous Rotary year. However, applications will not be reviewed or approved until a Progress Report or Final Report and all necessary supporting documentation has been submitted.
3. Clubs may apply for more than one grant, per Rotary year, by submitting separate applications for each request. However, these requests will be determined by the *total* number of District Grants awarded and are not guaranteed.
    - If a club is submitting more than one grant application for the same Rotary year, the applications must be prioritized by the requesting club.
    - When multiple grants are submitted, only the primary grant is evaluated in the first round of grant reviews. If there is additional funding available, remaining grant requests will be reviewed.
  4. Rotary District 5390 Grant Selection Committee reviews grant applications and awards grants for individual projects. Clubs will be notified of their application status and if they will receive an approved grant award amount by May 31<sup>st</sup>.
  5. Rotary International will receive all approved District 5390 District Grant applications by June 30<sup>th</sup>.
  6. All financial obligations must be met and proof of matching funds, in the form of a bank or financial account statement, must be submitted prior to grant award disbursement. This proof of matching funds must be submitted by July 31<sup>st</sup>.
  7. Award checks will be disbursed to clubs as soon as District 5390 District Grant award funds are made available by TRF. This is a process and a specific disbursement date is unpredictable, but we anticipate disbursement by the end of August.
  8. Clubs carry out their project(s) throughout the Rotary year.
  9. Clubs must submit a District Grant Progress Report if project is still in progress, or has not been started, prior to December 1<sup>st</sup>.
    - Progress Reports are due December 1<sup>st</sup> and must be submitted to the District Grant Website in the Document Section to be reviewed by the District Audit Committee. Additionally, if projects have not been or will not be completed by the end of May, another Progress Report must be submitted no later than June 1<sup>st</sup>.
    - The District Rotary Foundation Chair (DRFC) will report to TRF on the use of these District Grant Funds.

10. Clubs must submit a District Grant Final Report within 30 days following the completion of the project.

- Final Reports are now an online form only. They must be filled out and submitted with signatures on the District Grant Website for review by the Auditing Committee.
  - Clubs must provide copies of all receipts related to grant-funded expenditures in conjunction with the Final Report.
  - Unused grant funds must be returned to The Rotary District 5390 Foundation.
  - Progress Reports and other information can be found by clicking on the 'District Grant Information' link, which can be found by visiting [www.montanarotary.org](http://www.montanarotary.org)
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