**District Grants Training**

**District 5770**

**2021-2022**

* GREAT news – once again you do not have to attend an actual training session!! You will just need to read this training document and e-mail Jennifer Warren, District Grants Chair, that you have done so. We would still like to provide an on-line video at some point, but as our environment is still a bit uncertain we are putting the video off for another year and making this as easy as possible.
* Additional news – we are keeping the accelerated timeline to better accommodate projects that need to correspond with the school year, with just a slight change in due date from last year.

**A quick grants summary:**

* How are district grants funded? We get to use 50% of our District Designated Fund, and it’s calculated based on the amount of DDF generated from the district’s annual giving three years prior. The district receives a lump sum and it is then distributed to each club, basically we administer our own grant program.
* District grants fund small-scale, short-term activities that address immediate needs in your community.
* How clubs qualify:

1. Agree to and sign the MOU (does not have to be signed by President and President-elect, can be signed by project co-chairs)
2. At least 2 club members must read on-line training document and e-mail District Grants Chair that they have done so (jennbill4@gmail.com)
3. Complete application along with Financial Management Plan (must be signed by the President)
4. Separate bank account (2 signors, low / non-interest bearing)
5. Complete and submit final report within 30 days of project completion, but absolutely no later than 2/28 – we must report to RI how funds are spent
6. Keep all documentation for minimum of 5 years

* What the Committee considers:
* Past & current contribution to TRF (past = 3 years prior)
* Project’s alignment with RI’s six areas of focus
* Potential exposure for Rotary upon completion of project
* Participation in district activities
* Is this project “transformative” – truly makes a difference
* Is the project sustainable – something that has “staying” power, will be there for years to come
* Important points:
* Applications due **May 31, 2021 –** this is so the money can be received back from RI by July 1st
* Per capita giving of $25 or more to the Foundation in the current or previous year
* Two new questions (introduced last year) on the application:

1. Our club is in compliance with IRS reporting (Form 990)?
2. Our club will proceed with the project, even if full funding request is not granted?

* Consumable items in general will not be approved (ie. band aids, laundry soap)
* Some sort of justification that the project is needed should be provided - a formal community assessment would be great, but an informal conversation verifying the need would be accepted
* No repeat projects will be approved, even if the beneficiaries are a different group from previous years
* More in-depth reporting of the results – we want the stories and we want others to see them, too

**Now, let’s go over the application in a little bit more detail:**

* Dates:
* Do not list a start date earlier than July 15th
* Do not list an end date later than February 15th
* List the area of focus you have chosen in the description on #1
* Round all numbers on the income and expenditures sections to the nearest dollar (but cents will be needed on the final report)
* Remember the income must match the expenditures
* The Club’s funds must be at least 20% of the total project

**Finally…..** Projects completed by 2/15/22 and reports turned in no later than 2/28/22