

District Grants Training
District 5770
2020-2021

- GREAT news – 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 had mentioned last year that we would look at training options and possibly provide an on-line video in an effort to be more conscious of everyone's time, but in today's ever-changing environment we are putting the video off for a year and making this as easy as possible.
- BIG news – the dates are changing – we are accelerating the process to better accommodate projects that need to correspond with the school year, and to allow COVID-19 related projects (more on that in just a little bit).

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 (including COVID-19 projects)
 - 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

- The NEW stuff:
 - Applications due **May 15, 2020** – this is so the money can be received back from RI by July 1st
 - This year you may apply for funds for projects related to COVID-19
Once your application is approved, projects responding to COVID-19 may begin – you do not have to wait until the funds are received and distributed in July, you may proceed and be reimbursed by the grant once the funds are available
 - Per capita giving of \$25 or more to the Foundation in the current or previous year
 - Two new questions 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)
 - Consumable items related to a COVID-19 project will be considered on a case by case basis
 - 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, with the exception of a COVID-19 project which may begin as early as March 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
- Remember the income should match the expenditures
- The Club's funds must be at least 20% of the total project

Finally..... Projects complete by 2/15/21 and reports turned in no later than 2/28/21