

**Rotary District 6040**

**District Grant Guidelines**

**Effective January 1, 2019 for 2019-20 Rotary Year**

***All D6040 Global Grant (GG) and District Grant (DG) projects are governed by and established by The Rotary Foundation (TRF). The Terms and Conditions may be found on the Rotary International Web site,*** [www.rotary.org](http://www.rotary.org). (Go to www.rotary.org->My Rotary and search on Terms and Conditions.)

The amount of money available for district grants is determined annually and is based on the annual fund contributions of District 6040 Rotarians to TRF’s Annual Fund/SHARE three years prior. Community service and small international projects are funded through District Grants and larger international projects are funded through the Global Grant program.

The District Grant Subcommittee recommends the District 6040 district grants projects for funding following the guidelines below. This subcommittee accepts applications, allocates and distributes money for approved grants. The district executive council and The Rotary Foundation give final approval to the district grant plans for the Rotary year. Questions about district grants should be sent to **D6040 Grant Sub-Committee Chair, Kent Shelman** Kentshelman86@gmail.com, 816-510-9945 or District Rotary Foundation Chair, Cassy Venters, cdventers@me.com, 816-896-8248.

**TRF requires Clubs to be grants qualified.**

* The schedule of grants management trainings will be available by January 1, 2019 and be sent to 2019-20 club presidents, presidents-elect, 2018-19 Grants Managers and club foundation chairs and posted on the district website. Grants management training will be conducted in face-to-face sessions and through webinars. Webinar participants will need to take an open-book test to satisfy the attendance requirements.

To be Grants Qualified for the 2019-20 Rotary year, the:

* 2019-20 Club President and Club Grants Manager\* must attend Grants Management Training by April 1, 2019. Grants Managers that served in 2018-19 do not need to attend training.
* 2019-20 Club President and president-elect must submit a signed Memorandum of Understanding to the District Rotary Foundation Chairperson by April 1, 2019.
* Beginning in the 2019-20 Rotary year, grants manager training will be in effect for two years. The Rotary Foundation requires club presidents to be trained each year.

**Important Dates in 2019-20**

* Grant Qualifications Training will be held January 15 – March 30, 2019
* April 1, 2019. The 2019-20 Club President and Grants Manager must complete grants Qualification Training. Grants Managers that served in 2018-19 do not need to attend training.
* April 1, 2019. A memorandum of understanding signed by the 2019-20 Club President and President-Elect is due to District Rotary Foundation Chair, Cassy Venters, cdventers @me.com.
* April 1-30, 2019. Grant applications are due to Kent Shelman, Kentshelman86@gmail.com.
	+ If all funds are not allocated by April 30, a second round of grant applications will be accepted through May 1 - 15.
	+ If all funds are not allocated by May 15, a third round of grant applications will be accepted through June 1 - 15.
* May 31, 2019. Completed grant reports for the ***2018-19 Rotary year*** are due to Kent Shelman, Kentshelman86@gmail.com.
* May 31, 2020. Completed grant reports for the ***2019-20 Rotary year*** are due to Kent Shelman, Kentshelman86@gmail.com.

**District Grant Requirements**

The District 6040 Grant Subcommittee administers District 6040 grants in accordance with the following Requirements, in addition to TRF Terms and Conditions.

1. **Area of Focus.** A grant project must be humanitarian in nature and must benefit a community need through one of TRF’s areas of focus:
	1. Peace and Conflict Prevention/Resolution
	2. Disease Prevention and Treatment
	3. Water and Sanitation
	4. Maternal and Child Health
	5. Basic Education and Literacy
	6. Economic and Community Development
2. **Sustainable impact:** The project’s impact should be sustainable, i.e., the impact or benefits continue after the project is completed and the benefitting recipient can maintain the project and its outcome.
3. **One application per club.** Clubs may submit one District Grant application. If District Grant funds remain after the first round of applications, there may be a second and third round of applications at which time a club could submit a second or third district grant for a different project or expand the scope of the first grant submitted. ***Final reporting deadlines will remain the same.*** If budgeted District Grant funds remain after a second round of applications, the District Grant Committee may use the funds for a district project approved by the District Rotary Foundation Chair and the District Executive Committee.
4. **The maximum District Grant request is $3,500.** Club contributions are matched $1 (club)-$3 (district) up to a maximum of $10,500,
	1. Example: $3,500 (club) matched $10,500 (district) for a total grant of $14,000. The total cost of the project may exceed $14,000 if the club has additional funding sources.
	2. Another example – a club contribution of $2,000 – district match of $6,000 total grant of $8,000.
	3. Clubs may apply for less than the maximum amount.
5. **On-going support to beneficiaries.** If the grant is to benefit a previously supported beneficiary, the grant application should explain how the grant enhances or extends the outcomes of earlier grants.
6. **Hands On Implementation.** The District Grant project should have a “hands on” implementation component; it is expected club members participate in a hands-on activity related to the grant implementation as part of the project.
7. **Not solely a financial contribution – No Pass-Through Funds.** District Grant funds cannot be used solely as a financial contribution to the beneficiary/recipient. Partnerships with other organizations are encouraged, however, the club and district portions of the grant must remain under the club’s control so that receipts, invoices and bank statements are available to the club for inclusion in the final report.
8. **Special Purchasing Circumstances.** Please contact the District Grant Chair to obtain permission for disbursements outside the grant guidelines as outlined in 8a and 8b (below). The club is still responsible for all receipts, invoices and bank statements.
	1. If Partner Organization can obtain lower prices through their organizational purchasing power and grant funds need to be sent directly to a partner organization.
	2. If the lowest price can only be obtained by the use of Rotarians’ personal credit cards.
9. **Rotary grants may not be used for employee salaries or overhead of beneficiaries.**
10. **Signage** at the project site recognizing Rotary’s contribution will strengthen the grant application and should be explained/detailed in the application.
11. **No project expenditures before Grant approval.** Expenses incurred before The Rotary Foundation (international level) approval are ineligible for reimbursement. This policy applies to any club funds used for the grant, including matching club funds.
12. **A separate bank account must be maintained for District Grant Funds and bank statements must be submitted with the final report.**
13. **All disbursements from the District Grant Account must have two signatures.**

**Reporting**

**Final report.** The project must be completed and the **final report** filed by May 31, 2020. **Reports that are not received by May 31, 2020 will result in the following process:**

1. **District Grant Chair and District Rotary Foundation Chair approval is needed to determine if a new deadline can be applied. This determination will be made based on the status of the grant, how near it is to completion, implementation problems, problems with resources or partners, etc.**
2. **If a new deadline is not established by the District Grant Chair and DRFC, the club will be automatically disqualified from receiving a grant in the next Rotary year and will have to return the funding from the current Rotary year.**
3. If clubs encounter circumstances beyond their control that delay implementation and reporting on their 2019-20 grant project, the club president or grants manager should contact the Grant Subcommittee Chair, **Kent Shelman** Kentshelman86@gmail.com, 816-510-9945 *immediately upon identification of the problem.*
4. **Late club reporting to the district results in the delay of the receipt district grant funds in the next Rotary year.**

**Selection Criteria**

Should the number of District Grant applications exceed available funding, preference in awarding a District Grant will be given to clubs that: Projects that meet the three criteria listed below will have priority in grant awards.

1. Clubs that participate in giving to The Rotary Foundation through Annual Fund-Share
2. Sponsor a community service project. Small international service projects will be considered after community service projects.
3. Clubs that reported on-time in the previous Rotary year or notified the District Grants subcommittee of implementation problems and returned their grant funds.
4. Present plans to recognize Rotary in signage related to the project or through a local publicity.

**Recommended Club Timeline**:

1. **January 2019**, The 2019-20 Club President (working jointly with the 2018-19 Club President) should begin project development and grant preparation by January 2019 in order to meet all grant application deadlines.

\*A club grant manager is any Rotary club member, other than the 2019-20 club president, who agrees to: 1) attend Grant Management Training, 2) work with club committees to develop grant applications that meet D6040 and TRF grant guidelines, 3) assist the club president in meeting deadlines, 4) ensure grants are implemented according to all guidelines, and 5) ensure that final reports are submitted in the needed format and by the designated deadlines.