



Rotary District 6040

District Grant Guidelines

Effective January 1, 2020 for 2020-21 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](http://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, Pat Kurtzeman**, [pat.kurtzeman44@gmail.com](mailto:pat.kurtzeman44@gmail.com), 660-665-0428 or District Rotary Foundation Chair, Kim LeSage, [kimlesage@sbcglobal.net](mailto:kimlesage@sbcglobal.net), 816-838-2336.

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

- The schedule of grants management trainings will be available by March 25, 2020 and be sent to 2020-21 club presidents, presidents-elect, 2019-2020 Grants Managers and club foundation chairs and posted on the district website. Grants management training will be conducted in online training podcasts to be developed. If the podcasts are unavailable by March 25, face-to-face sessions and webinars will be announced. Online training podcasts or Webinar participants will need to take a test to satisfy the attendance requirements.

**To be Grants Qualified for the 2020-21 Rotary year, the:**

- 2020-21 Club President and Club Grants Manager\* must attend Grants Management Training by June 15, 2020.
- 2020-21 Club President and president-elect must submit a signed Memorandum of Understanding to the District Grants Sub-Committee Chair, Pat Kurtzeman, by July 15, 2020.

**Important Dates in 2020-21**

- Grant Qualifications Training will be held between April 1, 2020 and June 15, 2020.
- June 15, 2020 - The 2020-21 Club President and Grants Manager must complete grants Qualification Training.
- June 15, 2020 - A Memorandum of Understanding signed by the 2020-21 Club President and President-Elect is due to the D6040 Grant Sub-Committee Chair, Pat Kurtzeman, [pat.kurtzeman44@gmail.com](mailto:pat.kurtzeman44@gmail.com).
- July 15, 2020 - Grant applications are due to D6040 Grant Sub-Committee Chair, Pat Kurtzeman, [pat.kurtzeman44@gmail.com](mailto:pat.kurtzeman44@gmail.com).
- May 31, 2020 - Completed grant reports for the 2019-2020 Rotary year are due to Kent Shelman, [kentshelman86@gmail.com](mailto:kentshelman86@gmail.com).
- May 15, 2021 - Completed grant reports for the 2020-2021 Rotary year are due to Pat Kurtzeman, [pat.kurtzeman44@gmail.com](mailto:pat.kurtzeman44@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:
  - a. Promoting peace
  - b. Fighting disease
  - c. Promoting clean water, sanitation and hygiene
  - d. Saving mothers and children
  - e. Supporting education
  - f. Growing local economies
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 round at which time a club could submit a second district grant for a different project or expand the scope of the first grant submitted. **Final reporting deadlines will remain the same and due May 15, 2021.** 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 \$2,500.00.** Club contributions are matched \$1 (club)-\$1 (district).
  - a. Example: \$2,500 (club) matched \$2,500 (district) for a total grant of \$5,000. The total cost of the project may exceed \$5,000 if the club has additional funding sources.
  - b. Another example – a club contribution of \$1,500 – district match of \$1,500 total grant of \$3,000.
  - c. 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.
  - a. If Partner Organization can obtain lower prices through their organizational purchasing power and grant funds need to be sent directly to a partner organization.
  - b. 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 15, 2021. **Reports that are not received by May 15, 2021 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 2020-21 grant project, the club president or grants manager should contact the Grant Subcommittee Chair, **Pat Kurtzeman**, [pat.kurtzeman44@gmail.com](mailto:pat.kurtzeman44@gmail.com), 660-665-0428 *immediately upon identification of the problem.***
4. **Late club reporting to the district results in the delay of the receipt of district grant funds in the next Rotary year.**
5. **All Final reports will need pictures of the project and signage submitted in jpg format. These will be used for District promotion of the Grant projects.**

### **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 four 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 thru March 2020**, the 2020-21 Club President (working jointly with the 2019-20 Club President) should begin project development and grant preparation by April 2020 in order to meet all grant application deadlines.

### **Anticipated Review and Funding Dates:**

1. If all reporting is in from the 2019-2020 Rotary year, the District Grants committee will attempt to review and approve the 2020-2021 applications by August 15, 2020. If no late reporting of 2019-2020, funding is anticipated between Sept 1, 2020 and September 14, 2020.

\*A club grant manager is any Rotary club member, other than the 2020-21 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.