



Rotary District 6040

District Grant Guidelines

Effective February 2023 for 2023-2024 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, Beth Franklin, [bethfranklin@kw.com](mailto:bethfranklin@kw.com)**, 816-665-5054 or District Rotary Foundation Chair, Marc Horner, [mhorner@aol.com](mailto:mhorner@aol.com), 816-985-8766.

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

- Grants management training will be conducted via online training modules on the Rotary International website in the MyRotary Learning Center. The login to the site is found at: <https://my.rotary.org/en/login>. You need a myRotary account to sign in and take the courses. If you do not have an account you can register for one on the <http://rotary.org> website.
- The Learning Center is found under the Learning & Reference tab. There are two required courses:
  - Grant Management Seminar (Learning Plan containing 10 different courses)
  - Grant Management Recertification 2022-23 or Grants Management.

**To be Grants Qualified for the 2023-2024 Rotary year, the:**

- The 2023-2024 Club President and Club Grants Manager, a minimum of two people, must complete on-line Grants Management Training by June 15, 2023.
- Certificates of Completion for training courses are to be submitted at the same time as the Memorandum of Understanding.
- The 2023-2024 Club President and President-Elect must submit a signed Memorandum of Understanding to the District Grants Sub-Committee Chair, Beth Franklin, by June 15, 2023.

**Important Dates in 2023-2024**

- June 15, 2023 - The 2023-2024 Club President and Grants Manager must complete grants Qualification Training.

- June 15, 2023 - A Memorandum of Understanding signed by the 2023-2024 Club President and President-Elect is due to D6040 Grants Sub-Committee Chair, Beth Franklin, [bethfranklin@kw.com](mailto:bethfranklin@kw.com)
- July 15, 2023 - Grant applications for **2023/2024 Rotary Year** are due to D6040 Grant SubCommittee Chair, Beth Franklin, [bethfranklin@kw.com](mailto:bethfranklin@kw.com) .
- May 31, 2023 - Completed final grant reports for the **2022-2023 Rotary Year** are due to the D6040 Grants Subcommittee Chair, Beth Franklin, [bethfranklin@kw.com](mailto:bethfranklin@kw.com)
- May 31, 2024 – Completed grant reports for the **2023-2024 Rotary Year** are due to the D6040 Grants Subcommittee Chair, Beth Franklin, [bethfranklin@kw.com](mailto:bethfranklin@kw.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. Providing clean water, sanitation and hygiene
  - d. Saving mothers and children
  - e. Supporting education
  - f. Growing local economies
  - g. Protecting the environment
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 30, 2024.*** 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 using 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 and disbursement checks 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 2024. **Reports that are not received by May 31, 2024 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 2023-2024 grant project, the club president or grants manager should contact the Grant Subcommittee Chair, Beth Franklin, [bethfranklin@kw.com](mailto:bethfranklin@kw.com), 816-665-5054 *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 whose projects 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.

## **Recommended Club Timeline:**

1. **January thru June 2023**, the 2023-2024 Club President (working jointly with the 2022/2023-Club President) and Grants Manager should begin project development and grant preparation by June 2023 to meet all grant application deadlines.

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

1. The District Grants committee will attempt to review and approve the 2023/2024 applications by August 15, 2023. Funding is anticipated between September 1<sup>st</sup> and September 15<sup>th</sup>.

\*A club grant manager is any Rotary club member, other than the 2023-2024 club president, who agrees to: 1) complete on line 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.