



Rotary District 5500 District Grant Application 2020-2021

Instructions

During Rotary Year (RY) 2020-2021 District 5500 will again have district grants available to assist clubs in funding new community service projects with up to \$6000 in matching district funds.

A. Preparing and submitting a District Grant Application:

- Step 1: Review the attached project Application and collect all supporting documentation. It must be a new project and should embody **one** of the Rotary Foundation's Six Areas of Focus. Project sustainability, club member participation, and the ability of the club to complete the project within the same Rotary year in which the funds are awarded will be key considerations in evaluating and ranking projects for award of district matching funds.
- Step 2: Complete the Application. Include a detailed project description, a spending and project financing plan, and all club leadership signatures. All sections of the Application must be addressed.
- Step 3: Applications for RY2020-2021 are requested between 1 June-15 July 2020 but may be submitted as late as 31 August 2020 if a separate "Request for Funds" outlining the club's anticipated project and the amount of funding to be requested from district is provided to the D5500 District Grants Subcommittee Chairman by 15 July 2020 AND funding is still available after meeting the requests of approved club applications submitted by 15 July.
- NOTE: Meeting published deadlines is essential so that the district's Spending Plan requesting grant funds from The Rotary Foundation (TRF) may be completed and submitted in a timely manner.

B. Please take special note of the following:

- Applications must be submitted using the attached form. Type up the application and retain a copy for your records.
- District grants are intended to assist clubs with the startup of a new service project and are not normally available to fund identical or essentially similar projects for a second year even if new beneficiaries are involved.
- No club may have more than one district grant active/open at a time without first obtaining exception approval from the D5500 Grants Subcommittee.
- A D5500 Rotary club must put up at least one-half of the total cost of the project in **cash** and the district, depending on the availability of district grant funding, may be able to match the club's contributions, dollar-for-dollar, up to a maximum limit of \$6000.
- Clubs must retain original receipts for all district grant funded expenditures and provide copies to the district with their Final Report. Both the district and the clubs are required by TRF to retain copies of receipts related to grant funded expenditures in accordance with local laws and for a period of at least five (5) years following closure of the grant and D5500's acceptance of the club's Final Report.
- **International projects** must be coordinated with a Rotary club in the country where the project occurs. Supporting documentation is required.
- A club must be Qualified and in Good Standing in accordance with D5500 Bylaws in order to apply for a D5500 district grant. Current club Qualification requirements and status are posted on the D5500 website. Details may be obtained from D5500 Stewardship Chairman, Mary Straus at rotarianmstraus@gmail.com.

- **Qualification Exception.** All provisions of the *Club Qualification MOU* apply to D5500 clubs when applying for a D5500 district grant with the exception of the requirement in Para 4 requiring a separate bank account for each grant. While a separate bank account is not required for any D5500 district grant, clubs are still required to put controls in place to ensure strict accounting of all district grant funds, funds collected, and funding expenditures.

Additional questions and assistance: Further information regarding project eligibility is available on the Rotary International website at www.rotary.org/grants.

D5500 District Grants Subcommittee Point of Contact: Joe Puett at jmpuett1@aol.com or 2732 Brewer Drive, Sierra Vista, AZ 85650.



Project Number (Assigned by D5500) _____

Rotary District 5500 District Grant Application 2020-2021

Application

Please type all information within this form

(NOTE: This is an MS WORD formatted document. Additional space between questions, when required, may be added by simply typing on the downloaded form.)

SECTION I. Project Description

Project Name: _____
(Descriptive Title)

1. **Club Name:** _____ **Club Number:** _____

2. **Location of the Project.** List the city, country, and (if applicable) the name and address of facility or organization where the project will take place.

3. **Rotary Foundation Six Areas of Focus.** List the **one** Area of Focus that best describes the Project.

4. **Project Description.** Describe the project goals and the problem or need it will address (including the intended beneficiaries) and how it will address those needs. Describe the work that will be undertaken.

5. **Est. Start Date (not earlier than 15 Aug '20):** _____

Est. Completion Date (not later than 1 May '21): _____

6. **Sustainability.** Describe how the benefiting community will maintain and continue the project after the grant funds have been fully expended.

7. **Outcomes.** Describe in some detail how you will know if the grant was successful in meeting the goals of the project described in Project Description.

8. **Rotarian Participation.** Describe the role and specific non-financial contributions to be made by D5500 Rotarians in planning, implementing, and publicizing the project. Estimate the number of D5500 Rotarians you expect will participate in the project:

SECTION II. Project Planning

1. **Equipment:** District 5500 and the sponsoring club are required to maintain a list of all major equipment purchased with grant funds and their current ownership and location. A list detailing each piece of equipment, the brand and model number, along with the owner and the location of the equipment is required in the Final Report. (NOTE: A Rotary club, Rotary district or Rotarian may not own anything purchased with Rotary grant funds.)
2. **Checks and Record Keeping:** Indicate who will be signing the checks for the equipment and items purchased with the grant funds. Will a separate bank account be established to hold the grant funds (not required for a District Grant) and, if not, how will the grant funds be accounted for so that when they are co-mingled with other funds their separate identity is not lost? **When the project is audited it will be necessary to produce bank records of all deposits and expenditures for this grant project.**
3. **Receipts:** State how the receipts for expenditures of this grant will be maintained. Copies of all deposits to the grant account and receipts for all expenditures in excess of \$50 are required as part of the Final Report. (NOTE: Original receipts are retained by the Rotary club for five (5) years after the Final Report has been accepted as complete or longer if local laws require. Copies of all receipts will be provided to the district with the Final Report.)
4. **Training:** Will training in the use and maintenance of equipment be necessary? If so, who will provide the required training and how will it be documented?
5. **Customs and Duties:** If this is an International project, indicate what arrangements have been made for customs clearance if items will be purchased and shipped from outside the project country.

6. **International Travel Expenses:** If you are including international travel in your project budget, please attach a separate sheet detailing **for each traveler** all travel expenses, fees, and related expenses that are included in this grant application. Research available itineraries and select a recently priced itinerary to send in with this application to validate cost estimates. Additionally, attach to the application biographic information for each traveler indicating whether or not they are Rotarians (and if so, from which club), detailing his/her unique qualifications, and his/her role in the project's implementation. (NOTE: Grant travel funds are not available for providing services that are otherwise readily obtainable in the project country.)

SECTION III. Project and Rotary Contact Information:

1. **Primary Club's Project Contacts:** Two (2) club Rotarians must be identified who will provide oversight and management of the project funds and the project. If two or more clubs are involved, one club must assume primary responsibility for preparing the grant application, administering the funds, maintaining the receipts, and for filing the Final Report.

Club Primary Contact:

Name: _____ Rotary Position/Title: _____

Postal Address: _____

Home Tel: _____

Cell Tel: _____

Business Tel: _____

Email: _____

Club Secondary Contact:

Name: _____ Rotary Position/Title: _____

Postal Address: _____

Home Tel: _____

Cell Tel: _____

Business Tel: _____

Email: _____

2. **Cooperating Organization (if any):** If a school or school district is involved, they are always a Cooperating Organization.

Name of Cooperating Organization: _____

Primary Contact:

Name: _____ Position/Title: _____

Postal Address: _____

Home Tel: _____

Cell Tel: _____

Business Tel: _____

Email: _____

Please furnish a letter or memorandum from the Cooperating Organization stating:

- (1) That appropriate permissions have been granted to proceed with the project;
- (2) What resources and funds the Cooperating Organization will put into this project;
- (3) What they will do after the project funds have been spent to ensure continuation (sustainability) of the project.

3. International Rotary Club (if an International project):

Please furnish a letter or an email from the International Rotary Club stating that they agree to assist the D5500 Rotary club with supervision of the project, administration of the funds (if required), and that they will provide copies of all receipts when the project is completed.

Name of International Host Rotary Club _____

District _____

Country _____

Club President:

Name: _____

Postal Address: _____

Home Tel: _____

Cell Tel: _____

Business Tel: _____

Email: _____

Primary Project Contact (if other than the Club President):

Name: _____ Rotary Position/Title: _____

Postal Address: _____

Home Tel: _____
 Cell Tel: _____
 Business Tel: _____
 Email: _____

SECTION IV. Project Spending Plan.

1. **Project Budget:** Please provide detailed pro-forma invoices or bid sheets for items totaling over \$1,000 and/or when most of the budgeted items will be purchased from the same supplier. (NOTE: Estimated invoices or bid sheets will be used to explain projected costs and to justify the club's requested match of district grant funds. Their use is not intended to limit flexibility but rather to establish a rational bases for the amount of grant funds requested.)
2. Further supporting documentation used for the development of this budget may be requested. **The cost of in-kind and donated goods and services do not count towards the cash budget totals or contributions.**
3. **Budget Items** – Give details and numbers:

Budget Items	Name of Supplier	Cost in \$US
a. _____	_____	_____
b. _____	_____	_____
c. _____	_____	_____
d. _____	_____	_____
TOTAL ESTIMATED COST:		_____

* If a foreign currency is used, give the exchange rate used.

4. **Conflicts of Interest:** If an item or service is provided by a Rotarian or a Rotarian family member, please provide an explanation of why this should not be considered a conflict of interest and why it is in the best interests of the service project and Rotary to use this particular source (i.e., This might be the best bid of several provided for accomplishing the work or that there was no other source available).
5. **Competitive Bids:** D5500 encourages Rotary clubs to use a competitive bidding process when selecting a major supplier. If only one supplier is used without competitive bids then a statement as to why it is in the best interests of the service project and Rotary to use this specific source should be included in the Final Report.

SECTION V: Project Financing Plan.

1. **Project Financing:** List all Rotary clubs that will be providing funds and the cash amounts of their contributions. Also list any contributions by other organizations and potential beneficiaries. (NOTE: At least 50% of the total cost of the project must be provided in cash by Rotary club funding. No credit towards the grant funding can come from in-kind contributions of donated labor or for services from any other non-cash sources.)

Club Name(s) and Names of other Sources Contribution Amount (in \$US)

a. _____

b. _____

Matching District Grant Funds to be requested from D5500: _____

Total Project Cost: _____

SECTION VI: Club Leadership Signatures [scan or take a picture of this signed page and submit w/ your application]

The undersigned President and Primary Contact (two separate individuals and signatures are required) both confirm that all information contained in this application:

Is true and accurate to the best of their knowledge;

That the club has agreed to undertake this project as an activity of the Rotary club;

That the club will comply with the required reporting and financial responsibilities outlined in this Application and The Rotary Foundation's Terms and Conditions for Rotary Foundation District Grants and Global Grants; and

That a complete Final Report will be provided within 60 days of project completion and not later than May 1, 2021. In the event the project is not completed by May 1, 2021, a Progress Report will be filed along with a written request for an extension to a date certain.

For the Rotary Club of _____ **Date:** _____

Club President: _____
(Print Name)

Signature: _____

Club Project Contact (other than the Club President): _____
(Print Name)

Signature: _____



Submit the completed application to D5500 District Grants Subcommittee Chairman:

Joe Puett at jmpuett1@aol.com (preferred) or (less preferred) by mail at 2732 Brewer Drive, Sierra Vista, AZ 85650