GRANT MANAGEMENT SEMINAR

DISTRICT 6630

(For Grants during the 2023-2024 Rotary Year)
Introductions

Today’s Program Presenters:

Larry Lohman (Kent)
District Foundation Chair

Sandy Naragon (Akron)
Grants Committee Chair

Katie Yeager (Lakewood-Rocky River)
Stewardship Chair

Shawn Gordon (Kent)
Grant Application Coordinator
Attendee Packet Contents

1. Application Checklist
2. Application Flow Chart
3. MOU (TRF)
4. MOU Addendum (District 6630)
5. PowerPoint Slide Presentation
6. Resources
   a) Rotary Grants: Terms & Conditions (D6630)
   b) Areas of Focus Statement
   c) Global Grants Needs Assessment Tools
   d) Global Grants Community Assessment Results Form
7. WHAT WE FUND: Eligible & Ineligible
8. Fictitious Project Application
9. Sample Final Report
Today’s Program Purpose:

• Understand how to manage a Rotary grant.
• Learn stewardship expectations.
• Prepare clubs to implement the Memorandum of Understanding (MOU) and MOU Addendum.
• Qualify clubs to receive grant funds.
• How to plan for and apply for matching grants through the District 6630 Grants Committee.
Today’s Program Purpose:

- Moves decision-making power/responsibility from The Rotary Foundation (TRF) to the club and district levels.

- There are TWO TYPES of Grants:
  - District Grants & Global Grants
    - Community Projects
    - Humanitarian Projects
    - Scholarships
    - Vocational training teams
Ensures that projects

- Have proper financial controls
- Adhere to technical standards
- Meet the needs of beneficiaries
- Fulfill their objectives
- Safeguard Rotary funds
Today’s Sections will discuss:

- Qualification
  (so that clubs may apply for grants)

- Designing A Project
  (so that club projects are fundable)

- Applying for & Implementing a Grant
  (so that clubs may apply for grants)

- Oversight & Reporting
  (so that clubs understand their responsibilities if awarded a grant)
SECTION 1
QUALIFICATION
QUALIFICATION REQUIREMENTS

1. 2 club members **attend** a grant management seminar
2. Submit a **Properly Signed** Club MOU.
3. Submit a **Properly Signed** Club MOU Addendum.
4. Club must be **current** on RI & District dues.
5. Club must be **current** on reporting for any existing District or Global Grants.
6. Club’s average per capita **contribution to the TRF Annual Fund** of $40 during the 2022-23 Rotary year to be qualified for 2023-24.
7. President Elect must enter your club’s **Foundation goal** in Goal Center in Rotary Club Central.
1. Read, Understand, & Follow the terms of both club MOUs
   a. Club MOU (from TRF).
   b. Club MOU Addendum (from District 6630).

2. The club member that will manage the club qualification process must have attended this year’s seminar.

3. Fully implement stewardship practices to prevent misuse of funds
TERMS OF QUALIFICATION

- Valid for one year.
- The Club is responsible for grant funds.
- The Club must disclose conflicts of interest.
- The Club must cooperate with all audits.
- The Club must use grant funds properly.
- Implement the club MOU (or be disqualified.)
SECTION 2

DESIGNING A PROJECT
SUCCESSFUL GRANT PROJECTS

GRANT PROJECTS:

• Meet community needs
• Have an implementation plan
• Maintain proper stewardship of funds and records
• Are sustainable (global)
• Involve a partner (global)
NEEDS ASSESSMENT

• Base projects on the community’s needs.

• Determine what resources your club and potential partners have.

• Talk to (and listen to) the community being served.

A formal Community Needs Assessment is required for all Global Grants.
PROJECT PLANNING

• Form a grant committee.
• Assign roles.
• Make an implementation plan.
• Establish a budget.
• Have a contingency plan.
• Have a document retention plan.
CREATE A BUDGET

- Realistic
- Reasonable prices
- Disclose conflicts of interest
UNDERSTANDING & SETTING GOALS

• Measurable
• Determine method of measurement
• Gather baseline data
• Sustainable
• Qualitative
• Quantitative
• Gather baseline data
SECTION 3

APPLYING FOR AND IMPLEMENTING A GRANT
ROTARY FOUNDATION GRANTS

• District Grants
  • May 15th
    (inquiry deadline)

• Global Grants
  • No deadline
    (rolling applications)

In either case, your 1st step is to submit a grant inquiry in Club Runner!
DISTRICT GRANTS

• Online application process (ClubRunner)

INQUIRY DEADLINE IS May 15th!

• Meet TRF fundability criteria
• Support a Rotary Club Project
• Direct Rotarian Participation
• Minimum total budget of US$1,000 ($500 Match)
• District confirms club is qualified
DISTRIBUTION GRANTS
(Leveraging your club’s dollars)

District Grants:

• The District currently matches Club Dollars (dollar for dollar based on funds availability) between $500 and up to $2,500 when available.

• Per TRF Policy, funds cannot be raised from beneficiaries or cooperating organizations in exchange for a grant.

• Funds cannot come from other grants.
DISTRICT GRANTS
(Timeline)

DISTRICT GRANTS:
• Submission of inquiries: A.S.A.P.
  Anytime after you have turned in your signed MOUs

• Deadline for District Grant inquiries: May 15th
  Inquiries cannot be submitted until club becomes qualified!

• Presentation to the Grants Committee
  • May and June Meetings
  • Make a short presentation
  • All material must be in your ClubRunner application
In July/August, the District submits its spending plan to TRF.

- After TRF approval, the District Grants Committee can take the final vote on projects with completed applications
- Once approved, the committee authorizes the disbursement of checks
- Projects can then begin
GLOBAL GRANTS:  

• Online application process (www.rotary.org)  
  (With a copy of the PDF in ClubRunner)  

• Meet goals of area of focus  

• Be sustainable  

• Involve Rotary clubs in two districts  

• Minimum total budget of US$30,000  

• District confirms club is qualified  

• District assists/confirms the application is fundable
SUSTAINABLE PROJECTS

Giving a community the skills and knowledge to maintain project outcomes for the long term, after grant funds have been expended.
GLOBAL GRANTS FUNDING
(Leveraging your club’s dollars)

• In District 6630, the minimum budget for a global grant is US$30,000.

• When Funds are available, District 6630 matches your club contributions at 100%.

• Only District 6630 funds are matched 80% with World Fund.
GLOBAL GRANTS FUNDING
(Leveraging your club’s dollars)

Global Grants Example:

Club(s) Money: $10,715
DDF Match: $10,715
World Fund Match: $8,572
Total project: $30,002
FINANCIAL MANAGEMENT

- Club should have a sufficiently detailed ledger for
  1. All Global Grants
  2. District Grants requiring multiple payments

- Bank account for funds received/paid

- Paper Trail
  - Distributing funds
  - Use checks or bank cards
 • Make Copies
 • Retain copies for a minimum of 5 years
 • Designate a Point of Contact to retain and upload documents
 • Provide access to documents for transparency (i.e. Club Runner)
Why do you need to report?

- Verifies grants were managed properly
- Provides valuable data for your club, partners, and Rotary
When & Where to Report:

The club **must** file:

- A report **every 6 months** (Interim) from the initial payment date on the Individual Project Report tab and
- A report labeled as the **FINAL** within 60 days of the project’s completion.

**Final Report must include** copies of: all receipts, invoices, bank statements and cancelled checks in the ClubRunner Grants Module.
City Hall beautification

Grant Project: City Hall beautification
Primary Sponsoring Club: Lakewood and Rocky River SR
Contact: Klick, W. Todd
Date Submitted: May 14, 2021 at 4:41 PM
Project Total Budget: $6,000.00
Project Total Financing: $6,000.00
Requested Grant Amount: $3,000.00

Click on any of the tabs below to access and update the various sections of the grant application.

Individual Project Report
Based on the above, this club is due for their next update by 3/1/2023
GLOBAL GRANT REPORTS

When & Where to Report:

• The club must file a report on Global Grants every 12 months (Interim) from the initial payment date at [www.rotary.org](http://www.rotary.org) + every 6 months in ClubRunner.

• A Final Report must also be filed within 60 days of the Project’s completion (also at [www.rotary.org](http://www.rotary.org)). Copies of all receipts, bank statements, etc. must be included with this.

• A PDF copy of the Rotary.org reports must be uploaded to the ClubRunner Grants Module.
GLOBAL GRANT REPORTS

Include in your report:

• How partners were involved
• Type of activity
• Evaluation of project goals
• How area of focus goals were met
• How funds were spent
• Number of beneficiaries and how they benefited
SECTION 4

Summary
TAKE ACTION – DISTRICT GRANT

Step 1: Become a Qualified Club
- Attend Grants Management Seminar
- Complete MOU’s
- PE enters foundation goals into Rotary Club Central
- Meet per capita giving to TRF

Step 2: Apply for a Local District Grant
- Submit Inquiry by May 15
- Work with assigned Liaison on application
- Schedule presentation to the Grant Committee
- Grants Committee will determine if the project meets fundability requirements and notify applicant.
Step 3: Following notification that your District Grant Project has been approved

- Approval will be after district spending plan is approved in August/September. Modifications or completion of the grant application in the Grants Module or additional presentation to the Grants Subcommittee may be needed prior to final approval
- You may start your project after approval
- Report on the project’s progress every 6 months through completion
- Submit Final report with supporting documentation
TAKE ACTION – GLOBAL GRANT

Step 1: Become a Qualified Club
- Attend Grants Management Seminar
- Complete MOU’s
- PE enters foundation goals into Rotary Club Central
- Meet per capita giving to TRF

Step 2: Apply for a Global Grant
- Submit Inquiry
- A community assessment and sustainability plan are key parts of the application
- Work with assigned Liaison on application
- Schedule presentation to the Grant Committee

Rotary
Step 3: Following notification that your Global Grant Project has been approved

- You may start your project.
- Report on the project's progress every 12 months to TRF and every six months in ClubRunner.
- Submit Final report with supporting documentation to TRF.
• Sample Potential Grant Application Review
• Sample Report Review
Common Issues

• Incorrect Signatures on the MOU’s
• In the application, failing to state what Rotarians are doing toward the project
• Failure to ensure that budget and financial information in the application is correct and balances
• Failure to upload all documents that are required for closure
QUESTIONS?