

GRANT MANAGEMENT SEMINAR



DISTRICT 6630

(For Grants during the 2025-2026 Rotary Year)

Introductions

Today's Program Presenters:

Larry Lohman (Kent)
District Foundation Chair

Patrick Scherer (Hudson)
Grants Committee Chair

Susan Nelson (Cleveland)
Stewardship Chair

Sandy Naragon (Akron)
Grants Committee Secretary



Attendee Packet Contents

1. Application Checklist
2. Application Flow Chart
3. MOU (The Rotary Foundation or 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. Example of Project Application
9. Sample Final Report



Purpose

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.



OVERVIEW OF ROTARY GRANTS

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



GRANT MANAGEMENT

Ensures that projects

- Have proper financial controls
- Adhere to technical standards
- Meet the needs of beneficiaries
- Fulfill their objectives
- Safeguard Rotary funds



SECTION 1

QUALIFICATION



QUALIFICATION REQUIREMENTS

1. Two club members **attend** a grant management seminar. Your incoming President and President Elect should also attend.
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 2023-24 Rotary year to be qualified for 2024-25.
7. President Elect must enter your club's **Foundation goal** in Goal Center in Rotary Club Central no later than May 15th, 2025.

MAINTAINING QUALIFICATION

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 who will gather the receipts and enter the project data into the online grant module must attend 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

AREAS OF FOCUS

ROTARY'S SEVEN AREAS OF FOCUS



**Peace & Conflict
Resolution**



**Supporting the
Environment**



Water & Sanitation



**Maternal & Child
Health**



**Disease Prevention
& Treatment**



**Basic Education
& Literacy**



**Economic
& Community
Development**

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.

CREATE A BUDGET

- Realistic
- Reasonable prices
- Disclose conflicts of interest



SECTION 3



APPLYING FOR AND IMPLEMENTING A GRANT

District 6630 Matching Grant Timeline

February



- ☐ Grant Seminar 2/8 @ 9 am
- ☐ Grant Seminar 2/19 @ 6 pm
- ☐ Grant Seminar 3/8 @ 9 am
- ☐ Clubs Qualified*

March



- ☐ Submit Signed MOUs
- ☐ Application Cycle Opens 3/15
- ☐ Input Grant Details
- ☐ Clubs Qualified*

April



- ☐ Submit Signed MOUs
- ☐ Input Grant Details ("Inquiry")
- ☐ Present to Grant Cmte 4/1/25
- ☐ Input Application/Budget
- ☐ Project Fundability Decided
- ☐ Clubs Qualified*

May



- ☐ Submit signed MOUs
- ☐ **MOU Deadline May 15th**
- ☐ **Grant Inquiry Deadline May 15**
- ☐ Present to Grant Cmte 5/6/25
- ☐ Project Fundability Decided
- ☐ Input Application/Budget
- ☐ Clubs Qualified*

June



- ☐ Present to Grant Cmte 6/3/25
- ☐ Project Fundability Decided
- ☐ Input Application/Budget
- ☐ Spending Plan Created

July



- ☐ Spending Plan Submitted to Rotary International
- ☐ Applications completed
- ☐ Foundation Goals Input

August



- ☐ Spending Plan Approved
- ☐ Applications Completed
- ☐ Foundation Goals Input
- ☐ Club projects approved for funding
- ☐ Clubs notified and asked to submit check request
- ☐ Projects start after funding approved.

September



- ☐ Applications Completed
- ☐ Foundation Goals Input
- ☐ Club projects approved for funding
- ☐ Projects start after funding approved

October



- ☐ Applications Completed
- ☐ Foundation Goals Input
- ☐ Clubs Approved for funding
- ☐ Projects start after funding approved
- ☐ **Application Deadline: 10/31/25**

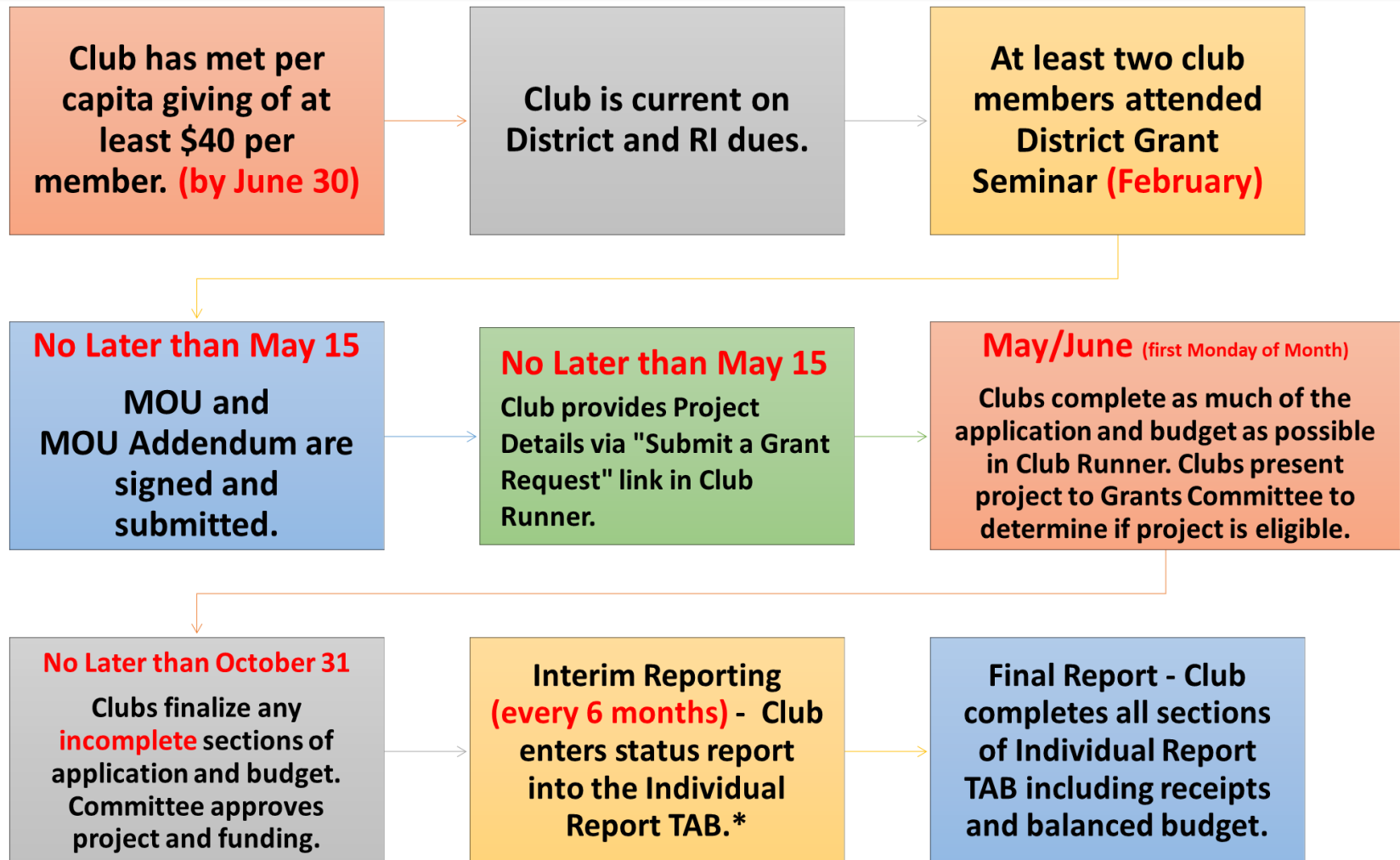
November



- ☐ Clubs approved for funding
- ☐ Projects start after funding approved

District 6630 Matching Grant Process – At A Glance

Grants are processed via Club Runner. The TABS are found in the Grant Module. Rotarians who've completed the Grant Seminar are authorized to enter information in Club Runner. Know your Rotary login and password. Call your Grant Liaison if you have questions!



APPLYING FOR DISTRICT GRANTS

DISTRICT GRANTS

- Online application process in ClubRunner

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



DISTRICT GRANTS

(Leveraging your club's dollars)

- The District currently matches Club Dollars (dollar for dollar based on funds availability) between \$500 and up to \$2,500--**depending on how many Clubs apply and availability of funds.**
- 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)

- Applications Open March 15. MOU's must be properly signed prior to application.
- Deadline for District Grant inquiries and foundation goal entered into Clubrunner: May 15th

Inquiries cannot be submitted until MOUs have been submitted.

- Presentation to the Grants Committee:
 - April, May and June Meetings
 - Make a two-minute presentation
 - All material must be in your ClubRunner Grant Module Application

DISTRICT GRANTS

(Timeline...continued)

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. **Wait for confirmation!**

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



DOCUMENT RETENTION

- 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)



REPORTING REQUIREMENTS

Why do you need to report?



- Verifies grants were managed properly
- Provides valuable data for your club, partners, and Rotary

DISTRICT GRANT REPORTS

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.



DISTRICT GRANT REPORTS



District 6630

[Admin](#) [For Clubs](#) [Grants](#) [For Members](#) [Membership](#) [Contacts](#) [Organization](#) [Communication](#) [Website](#) [Documents](#) [Reports](#) [Attendance](#) [Events](#) [Bu](#)

[Submit a Grant Request](#) [My Club Grants](#) [District Grants](#) [Grant Documents](#)

Grants

[Grants Dashboard](#)

[View All Grants](#)

[Qualified Clubs](#)

[Submit a Grant Request](#)

Reports

[Financial Summary](#)

[District Grants Cash Flow](#)

Documents

[District Grant Documents](#)

Settings & Customization

[Edit Notifications](#)

[Email Templates](#)

[Settings](#)

Help

[Grants Module](#)

City Hall beautification

Grant Project: City Hall beautification

Primary Sponsoring Club: Lakewood and Rocky River SR

Contact: Kiick, 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.

[Details](#) [Application](#) [Budget](#) [Documents](#) [Project Overview](#) [Individual Project Report](#) [Activity Log](#)

DISTRICT GRANT REPORTS

Details Application Budget Documents Project Overview **Individual Project Report** Activity Log

Print

Submit

Project Description

project description goes here



8/29/22 All three flower pots received by Rocky River and were damaged in shipping. Replacement are pots due sometime in September.

2/16/22 Kathy Berkshire and I met with RR City Executives and the Chief of Police to advance the project. They are going to select the protective barriers/pots and gain approval from the Mayor on the specific selection. Thereafter they will be in touch with us for directions on how to proceed re: ordering.

1. Describe the project. What was done, when, and where did the project activities take place?

2. How many people benefited from this project?

body div

Update

Based on the above, this club is due for their next update by 3/1/2023



APPLYING FOR GLOBAL GRANTS

GLOBAL GRANTS:

- Online application process (www.rotary.org)

(With a copy of the PDF in ClubRunner Grant Module Documents Tab)

- Application can begin at any time in the Rotary year
- Meet goals of an area of focus
- Formal Community Needs Assessment is required
- Sustainability Plan required to ensure permanent success
- 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

Global Grants Example:

Club(s) Money:	\$10,715
DDF Match:	\$10,715
World Fund Match:	<u>\$ 8,572</u>
Total project:	\$30,002



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 + **every 12 months in ClubRunner.**
- A Final Report must also be filed within 60 days of the Project's completion (also at 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

DISTRICT & INTERNATIONAL GRANT DEMO

- Submit Grant Inquiry
- Sample Potential Grant Application
- Sample Report Review

SECTION 4

Summary



TAKE ACTION – DISTRICT GRANT

Step 1: Become a Qualified Club

- Attend Grants Management Seminar
- Complete MOU's by **May 15th**
- PE enters foundation goals into Rotary Club Central by **May 15th**
- 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.



TAKE ACTION – DISTRICT GRANT

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

- Approval will be after district spending plan is approved in August/September. Completion of the grant application in the Grants Module. **This must be completed no later than October 31st.**
- You may start your project after approval
- Report on the project's progress every **6 months** through completion
- Submit Final report with supporting documentation

Common Issues

- Incorrect Signatures on the MOU's
- Turning MOU in by **May 15th**
- Not entering foundation goals into Rotary Club Central in MyRotary
- Not submitting application by October 31st
- 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

DISTRICT GRANT REVIEW

