# GRANT MANAGEMENT SEMINAR

## DISTRICT 6630

(For Grants during the 2024-2025 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**

**Terri Speck** (Westlake-Bay Village)
**Grants Committee Treasurer**

# 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

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# 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

# GRANT MANAGEMENT

**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)**

# QUALIFICATION REQUIREMENTS

1. Two 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 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.

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# 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 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.

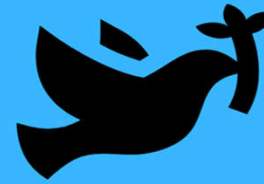- Implement the club MOU (or be disqualified.)

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# AREAS OF FOCUS
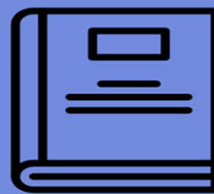
# SUCCESSFUL GRANT PROJECTS

## 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.**

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# CREATE A BUDGET

- Realistic

- Reasonable prices

- Disclose conflicts of interest

# SECTION 3

# APPLYING FOR AND IMPLEMENTING A GRANT

# DISTRICT GRANT TIMELINE

March 15, 2024 – 2024-2025 Grant Application Process Opens, Inquiries can be entered
April 1, 2024 – Grant Subcommittee Meeting –Grant Inquiry Presentations Begin
May 6, 2024 -  Grant Subcommittee Meeting –Grant Inquiry Presentations Continue
May 15, 2024 – Grant Application Inquiries Close
June 3, 2024 - Grant Subcommittee Meeting –Grant Presentations Complete

April 2 – Nov 4, 2024 – Grant Applications Finalized* and Approved

July 15, 2024 – District Grant Spending Plan Complete, Submitted to Rotary International

Between Aug 30-Sept 30 – TRF Completes Review of Spending Plan, Check Sent to District 6630 Treasurer.  Upon receipt of funds, checks will be sent to clubs with approved projects.

*October 31, 2024 – Last day to finalize grant applications.

## Projects can only begin after funding is received!!!

# District 6630 Matching Grant Timeline

## February
- [ ] Grant Seminar 2/10 @ 9 am
- [ ] Grant Seminar 2/21 @ 6 pm
- [ ] Grant Seminar 3/9 @ 9 am
- [ ] Clubs Qualified*

## March
- [ ] Submit Signed MOUs
- [ ] Application Cycle Opens 3/15/23
- [ ] Input Grant Details
- [ ] Clubs Qualified*

## April
- [ ] Submit Signed MOUs
- [ ] Input Grant Details ("Inquiry")
- [ ] Present to Grant Cmte 4/12/24
- [ ] 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 5/6/24
- [ ] Project Fundability Decided
- [ ] Input Application/Budget
- [ ] Clubs Qualified*

## June
- [ ] Present to Grant Cmte 6/6/24
- [ ] 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
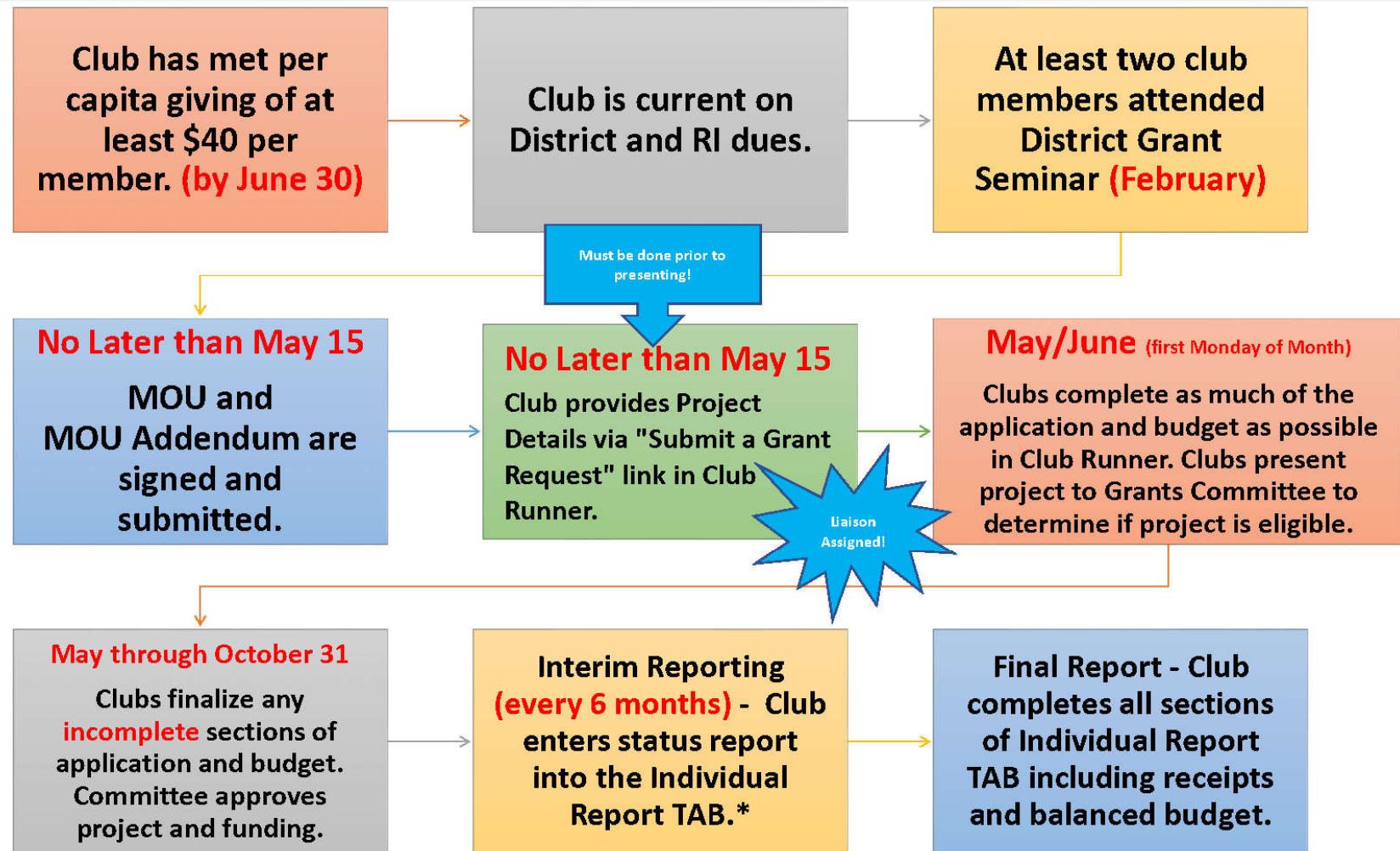- [ ] **Application Deadline: 10/31/24**

## November
- [ ] Clubs approved for funding
- [ ] Projects start after funding approved

*Clubs qualified by having two club members attend Grant Management Seminar and submit properly signed MOU and MOU addendum.*

# 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!

**Club has met per capita giving of at least $40 per member. (by June 30)**

→

**Club is current on District and RI dues.**

→

**At least two club members attended District Grant Seminar (February)**

*Must be done prior to presenting!*

**No Later than May 15**
MOU and MOU Addendum are signed and submitted.

→

**No Later than May 15**
Club provides Project Details via "Submit a Grant Request" link in Club Runner.

→

**May/June** (first Monday of Month)
Clubs complete as much of the application and budget as possible in Club Runner. Clubs present project to Grants Committee to determine if project is eligible.

*Liaison Assigned!*

**May through October 31**
Clubs finalize any **incomplete** sections of application and budget. Committee approves project and funding.

→

**Interim Reporting (every 6 months)** - Club enters status report into the Individual Report TAB.*

→

**Final Report** - Club completes all sections of Individual Report TAB including receipts and balanced budget.

# APPLYING FOR DISTRICT GRANTS

## DISTRICT GRANTS

- Online application process in 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

# 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: 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!**

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# APPLYING FOR GLOBAL GRANTS

## GLOBAL GRANTS:

- Online application process ([www.rotary.org](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: | $ 8,572 |
| Total project: | $30,002 |

# SUSTAINABLE PROJECTS

Giving a community the skills and knowledge to maintain project outcomes for the long term, after grant funds have been expended.

# 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

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# 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)
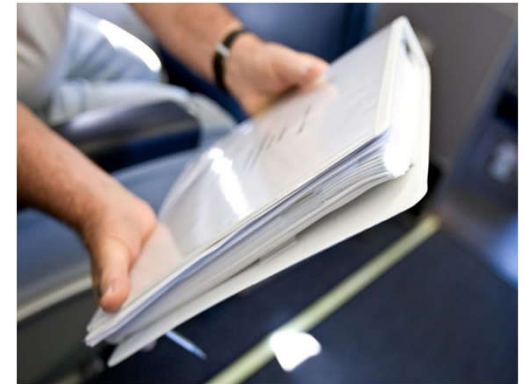
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# REPORTING REQUIREMENTS

## Why do you need to report?

- Verifies grants were managed properly

- Provides valuable data for your club, partners, and Rotary

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# 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.



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# 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 ~~~ rant 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

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# DISTRICT GRANT DEMO

- Submit Grant Inquiry

- Sample Potential Grant Application

- Sample Report Review

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# 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](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](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

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# 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.

# TAKE ACTION – DISTRICT GRANT

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

    **-** Approval will be <u>after</u> 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

## 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

# TAKE ACTION – GLOBAL GRANT

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

- You may start your project.
- Report on the projects progress every 12 months to TRF and every six months in ClubRunner.
- Submit Final report with supporting documentation to TRF.

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# 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

# DISTRICT GRANT REVIEW