

The
Rotary
Foundation



GRANT MANAGEMENT SEMINAR

2023-24



THE ROTARY FOUNDATION DEPENDS ON YOU

A REPUTATION TO BE PROUD OF

The Rotary Foundation has more than a Century of Success at Doing Good in the World. We remain one of the top-rated charities around the Globe.

15 Years and counting –The Rotary Foundation has received Charity Navigator's coveted 4-Star Rating

- **Impact**
- **Accountability**
- **Transparency**
- **Sustainability**



THE ROTARY FOUNDATION GRANTS TEAM



Ed Walsh

**District 5650
Global Grants
Chair**



**Mick
McKinley**

**District 5650
Rotary
Foundation
Committee
Chair**



Nicki Klein

**District 5650
District
Grants Chair**



DISTRICT LEADERSHIP

- District Leadership Team
 - Kathryn Schubert DG
 - Tom Kerfoot DGE
- District Foundation Team
- Assistant Governors
- All found on the District 5650 Website



TODAY'S AGENDA

- Club & Member Qualification and Certification
- 2023-24 DDF Funding
- Types of Grants
- Stewardship, Reporting

QUALIFICATION AND CERTIFICATION

1. Memorandum Of Understanding:
 - Complete all fields
 - Signed by current Club President, and
 - Signed by Club President-elect

2. Two Club Members attend a Grant Management Seminar:
 - Suggest at least one Club Officer (President or Treasurer)
 - Suggest Club member heading up the Grant Project
 - Only participants are permitted to enter project applications
 - Send as many Club members as you like (no limit)

QUALIFICATION AND CERTIFICATION (CONTINUED)

3. Club is Current with:

- Grant Reporting
- Payment of Dues to District and RI

4. Club must submit goals on Rotary Club Central (at Rotary.org) for:

- Membership
- Giving to The Annual Fund of The Rotary Foundation, and
- Giving to Polio Plus



TERMS OF QUALIFICATION / CERTIFICATION

- Valid for one Rotary year (July 1 – June 30)
- Entire club responsible
- Disclose potential conflicts of interest
- Proper use of grant funds
- Timely grant reporting

SOURCE OF GRANT FUNDING



TIMELINE

2020-21

**Contributions
to The Rotary Foundation
Annual Fund**

1

yr

2021-22

**Funds
Invested**

2

yr

2022-23

**Funds
Invested**

3

yr

2023-24

**Funds
Available for
Projects**

DISTRICT DESIGNATED FUNDS

2023 – 24 Rotary Year

Annual Fund Contributions from 2020-21: \$202,474

District Designated Funds for 2023-24: \$101,237

Half of the DDF goes to each area below:

**DDF for
District Grants
\$50,618**

**DDF for
Global Grants
\$50,618**

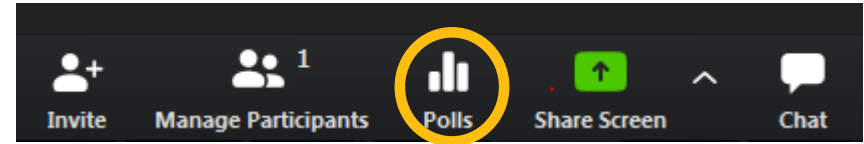


FOR THOSE WHO MISSED THE OPENING:

REQUIRED FOR CREDIT

The poll will be brought up at the end of the session.

It is required for credit – do not leave the meeting until it is completed.

A screenshot of the Zoom 'Polls' window. The title bar says 'Polls'. The main title is 'Polling 1: Required for Credit' with an 'Edit' link. The first question is '1. Is this your first Grant Management Seminar?' with radio button options for 'Yes' and 'No'. The second question is '2. Has your club participated in a Grant project in the past?' with radio button options for 'Yes', 'No', and 'Unsure'.

Polling 1: Required for Credit Edit

1. Is this your first Grant Management Seminar?

☐ Yes

☐ No

2. Has your club participated in a Grant project in the past?

☐ Yes

☐ No

☐ Unsure

RESOURCES



Grants Page under The Rotary Foundation of
www.rotarydistrict5650.org

- Documentation
- Announcements

RESOURCES

WELCOME TO THE GRANTS PAGE

GRANTS

Welcome to Grants

Welcome to the Grants Page

Forms - Always Apply (not year specific)

Grant Terms and Conditions -
Rotary International - District
Grants

Grant Terms and Conditions -
Rotary International - Global
Grants

The Rotary Foundation Code of
Policies

Areas of Focus Policy Statements

Signage Guidelines for TRF
Funded Projects



DISTRICT GRANTS - BASIC INFORMATION

Contact: districtgrants@rotarydistrict5650.org

Important Dates – All Clubs and Projects are Subject to Adherence to these Dates			
May 31 App Due	RI Approval Prior To Project Start; not prior to July 1	Dec 31 Progress Report	Mar 31 Final Report

1. Applications for District Grant Projects will be entered by the clubs through the District Website grants module
 1. [click here](#) to go to Admin Page
 2. Logon is Required
 3. Use links at the top to go to Submit Grant or My Club Grants to view or update once entered
2. Clubs must first be certified to have access to the online application (see below)
3. Members must be certified to get access to the online application to enter a district grant project application; those members must participate in a GMS
4. Application, reports, supporting documents, etc. will be attached through the District Website online application module screens by the Clubs
5. Review the Rotary International Terms and Conditions for guidelines and restrictions including, but not limited to these restrictions . . . funds cannot be used for . . .
 - a. the purchase of land or buildings
 - b. reimbursement for expenses previously incurred
 - c. supporting fundraising in any way
 - d. unrestricted cash donations to a beneficiary

RESOURCES

- Terms and Conditions for District Grants
- Rotary Foundation Code of Policies
- Rotary Areas of Focus



TERMS AND CONDITIONS FOR ROTARY FOUNDATION DISTRICT GRANTS

District grants fund small-scale, short-term activities that address needs in your community and communities around the world. These activities align with The Rotary Foundation's mission to help Rotary members advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty. Districts decide which activities they want to support with district grants.

The Rotary Foundation may modify these terms and conditions at any time to clarify them or to reflect policy changes. Changes made as of January 2022 include:

- Addition of information about Rotary's youth protection policies (see section I, Eligible Activities)
- Clarification that receipts must be provided for all expenses for grants paid to Argentina and Brazil (see section 8, Reporting Requirements)
- An explanation that interest earned on grant funds must be sent to The Rotary Foundation (see section 9, Canceled Grants)
- Clarification about Rotary's Conflict of Interest Policy for Grants (see section 12, Conflict of Interest Policy for Grants)

You can find additional updates and resources, including the [Terms and Conditions for Rotary Foundation Global Grants](https://www.rotary.org/en/terms-and-conditions-for-rotary-foundation-global-grants), at [rotary.org/grants](https://www.rotary.org/en/grants).

1. ELIGIBLE ACTIVITIES

RESOURCES

II. ELIGIBILITY GUIDELINES

All Foundation grant activities need to:

1. Relate to the Foundation's mission
2. Include active participation from Rotarians
3. Exclude The Rotary Foundation or Rotary International from any liability beyond the amount funded by the grant
4. Comply with the laws of both the United States and the area where the grant will be carried out and cause no harm. If you sponsor projects in or plan travel to countries sanctioned by the U.S. Treasury Department's Office of Foreign Assets Control, you may need to supply more information.
5. Be reviewed and approved by the Foundation before being implemented. You can't use grants to reimburse clubs or districts for activities and expenses that are in progress or already completed. We encourage you to plan for activities before a grant is approved, but don't incur any expenses. If you want to alter a project after a grant is approved, the Foundation also needs to approve those changes before they are carried out.

III. RESTRICTIONS

Grants cannot be used to unfairly discriminate against any group, promote a particular political or religious viewpoint, support purely religious functions, support activities that involve abortion or that are undertaken solely for sex determination, fund the purchase of weapons or ammunition, or serve as a new contribution to the Foundation or to another Foundation grant.

Grants also cannot fund:

1. Continuous or excessive support of any one beneficiary, entity, or community
2. The establishment of a foundation, permanent trust, or long-term interest-bearing account. Grant funds can be used to establish a microcredit fund if the sponsors comply with the requirements detailed in section X.
3. The purchase of land or buildings
4. Fundraising activities
5. Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities
6. Public relations initiatives, unless they are essential to carrying out the project
7. Project signs that cost more than \$1,000
8. The operating, administrative, or indirect program expenses of another organization, with the exception



CERTIFICATION

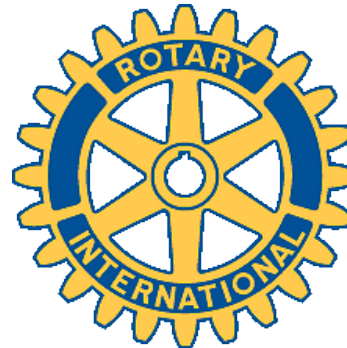
STATUS OF CLUB AND MEMBER CERTIFICATION FOR 2022-23 GRANTS - ROTARY DISTRICT 5650							
As of 5-28-22	Club Certified	MOU	2022-23 Goals Set in Rotary Club Central	4/13/2022	4/26/2022	5/5/2022	5/17/2022
Ashland	5/31/2022	5/31/2022	Report	Mark		Gary, Janece	
Beatrice	Tent	5/28/2022		Arvid		Jessica	
Bellevue Papillion				Jeff		Charles, Joe	
Blair	5/11/2022	5/11/2022	5/11/2022	Kyle	Bob		
Columbus Morning	5/24/2022	5/19/2022	5/24/2022		Amy		Chelsea
Columbus Noon	5/24/2022	5/24/2022	5/24/2022				Carol, Jamie
Council Bluffs Centennial	4/28/2022	4/15/2022	4/28/2022	Craig, Jennifer			
Council Bluffs Noon	4/28/2022	4/15/2022	4/28/2022	Nancy, Don, Leo			Tom
Crete	5/16/2022	5/16/2022	5/15/2022	Jack	Janelle		
David City	Tent	5/31/2022					Amy, Maureen
Fremont	Tent	5/4/2022		Janell			Shelly
Glenwood	Tent	5/29/2022		Patrick			Joe
Lincoln #14	5/2/2022	4/15/2022	5/2/2022	Eric	John		Christine, Landon
Lincoln East	5/25/2022	5/25/2022	Report			Minnie	Darrel
Lincoln Giving Spirits							Brad, Jodi
Lincoln South	Tent	6/1/2022				Maxine	Matt
Nebraska City						Rex	Randall
Norfolk	6/1/2022	6/1/2022	Report	Andy, Christine			
Omaha Downtown	Tent	6/1/2022				Heather	Gretchen, Nash
Omaha Millard	5/23/2022	5/23/2022	5/23/2022	Tom	Robert, Adrian		
Omaha Morning	Tent	5/31/2022	5/24/2022		Aaron	Max	
Omaha Night	5/17/2022	5/17/2022	5/6/2022	Dennis			Dave
Omaha Suburban	Tent	5/27/2022			Steve	Jennifer	
Omaha West	Tent	5/27/2022		Elizabeth	Charles, Debora	Brett, Kathy	
Red Oak	5/30/2022	5/28/2022	Report	Candy			Doug
Seward	Tent	5/28/2022			Marla		Zane
Shenandoah				Michael			Julie
Wayne	5/30/2022	5/28/2022	Report	Bob, Marie			
Western Douglas County	5/26/2022	5/26/2022	5/26/2022	Gail		Jim	
York	Tent	5/31/2022			Sue	David	
Tent - for clubs who have not been able to get access to Rotary Club Central to set goals - not certified - but the system is open to enter a grant <i>If a club is not shown, they have not completed any of the requirements for certification.</i>							

ROTARY BRAND

- Signage Guideline
- Recognition Plaque
- Latest Brand
- Identify Club
- Use Brand Center at rotary.org



INCORRECT USE OF LOGO



Midtown Rotary Club
Bike Ride

The
Rotary
Foundation



DISTRICT GRANTS



DISTRICT GRANTS

- Local community projects
- Relate to the mission of The Rotary Foundation (TRF)
- Include active participation of Rotarians
- Cannot repeat prior projects
- Scholarships are ineligible for District Grants



OUR CAUSES - AREAS OF FOCUS



DISTRICT GRANTS – MONEY MANAGEMENT

- MUST use a dedicated bank account for all project funding and expenses
- All project activities, and only project activities, through this account
- Bank statements and check images must be part of project reporting
- Receipts required for all expenditures
- Project expenses may not be incurred before approval by TRF

DISTRICT GRANTS – MONEY MANAGEMENT

- Stay ahead of your Financial Reporting Obligations!
 - Upload bank statements as they are received
 - Upload receipts as they are received
 - Label documents so we can recognize what they are (not just Document 1, Document 2, etc.)
 - Create a spreadsheet showing each expense and the check used to pay it

DISTRICT GRANTS-MATCHING FUNDS



- **1:1.25** Club Contribution / District Match
- Single Club District Grant Projects \$1,500- max \$1,875 – Maximum Match

\$500 - Minimum Amount from Club

- Multi-Club District Grant Projects -\$6,000 max contribution \$7,500 - Maximum Match
(4 clubs must participate in order to receive the max. match)
\$300 - Minimum Amount from any Club

DISTRICT GRANTS – PROJECT TIMELINE

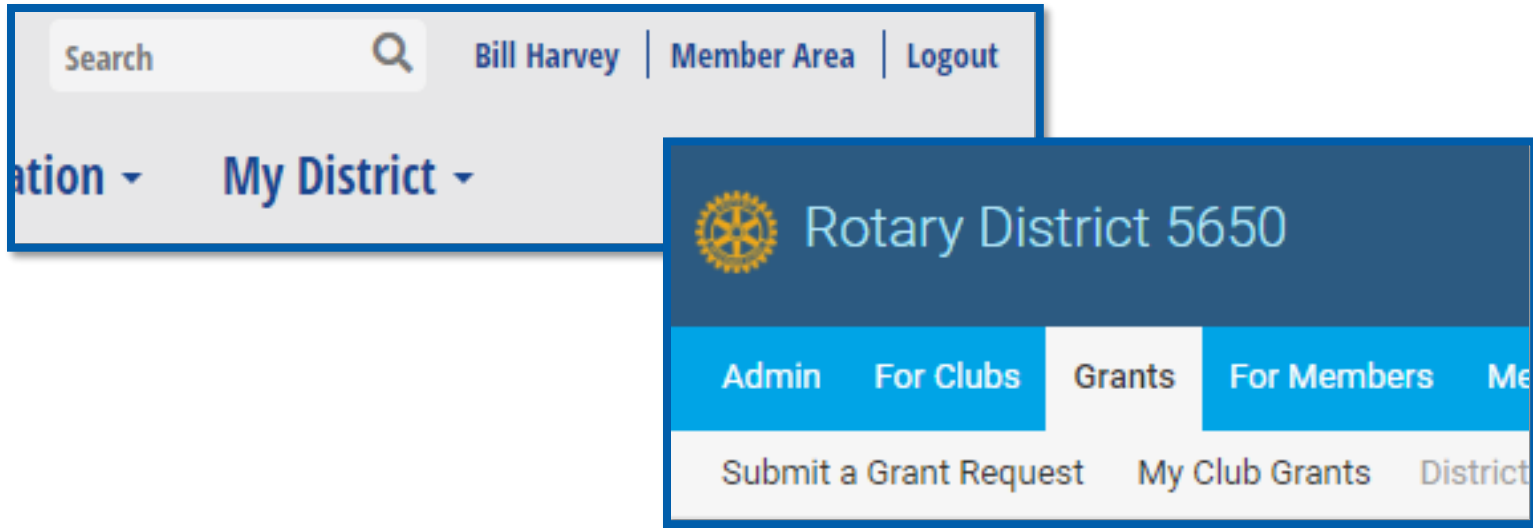
- **May 31, 2023** – Deadline to submit online applications
- **June 2023** – District committee reviews project applications, submits Spending Plan to TRF for approval
- **July/August 2023** – Grant project approval notification; funds received from TRF and disbursed to clubs; projects can begin
- **December 31, 2023** – Interim report due
- **March 31, 2024** – Project completion deadline and final report due

PROJECT TIMELINE – OTHER ORGANIZATIONS

- Be sure the organization understands Rotary's timeframes and requirements.
 - Project expenses cannot be incurred until project is approved.
 - Orders cannot be placed prior to approval.
 - We cannot reimburse for expenses previously incurred.
 - Timeframe for work is basically August through March.
 - Project must follow the approved application – changes cannot be made without consideration by the District Grant Committee
 - Reports are due in December and March.



DISTRICT GRANTS – ONLINE APPLICATION



- Log in to District Website, go to the “Member Area”, then to “Grants”, and then to “Submit a Grant Request”
 - Information requested
 - Determination of Need
 - Sustainability



DISTRICT GRANT PROJECT HISTORY

District Grant Projects

2021-22 District Grants Awarded

2020-21 District Grants In Review

2019-20 District Grants In Review

2018-19 District Grants In Review

2017-18 District Grants In Review

2016-17 District Grants In Review

2015-16 District Grants In Review

2014-15 District Grants In Review

2013-14 District Grants In Review

2012-13 District Grants In Review



Rotary District 5650 Grants 2021-22

Awarded

Statistics:

- \$53,758 – available matching funds
- \$39,704 – grant funds requested for club projects and forwarded to Rotary International; the remainder to support the District Project
- 27 Club Projects submitted to the District Grants Committee and forwarded to Rotary International
- 24 Clubs represented
- Some clubs submitted multiple projects; Some projects included multiple clubs

Ashland Tree Planting in Waverly - \$1500

Beatrice BWC Padding - \$1500

Bellevue Papillion Helping Habitat - \$1500

Columbus Morning Kitchen upgrade for cooking classes
- \$1500

Columbus Morning Walking Tour - \$1500

Council Bluffs Noon Bench and Tree for Therapy Garden
- \$1500

Crete Non-profit theatre floor cleaning and painting -
\$784



WORKING WITH BENEFICIARY ORGANIZATION

- Items to consider when working with a third-party organization:
 - Are you certain the project you are considering is something the organization wants? Perhaps they have another need in mind.
 - Will the project benefit the community at large and not just the organization or a limited segment of the community?
 - As mentioned, be sure the organization understands the timeframes and requirements – does the project fit?

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GLOBAL GRANTS



A GLOBAL GRANT MUST:

- Align with one or more **Areas of Focus**
- Be Host Community driven
- Exhibit good **Stewardship** of funds awarded
- Provide a Long-Term Benefit – **Be sustainable**
- Include active Rotarian participation
- Have measurable goals and results

OUR CAUSES - AREAS OF FOCUS



GLOBAL GRANT PARAMETERS

- Minimum Project Size \$30,000
- World Fund Match 80% of DDF
- Maximum Grant from TRF \$400,000
- Maximum Project Size Unlimited
- Deadline for Global Grants – to be announced



GLOBAL GRANT FUNDING – AN EXAMPLE

Club Contribution	\$10,715
District Match (DDF) (Up to 100% of Club Contribution)	\$10,715
World Fund Match (80% of DDF)	\$8,570
TOTAL PROJECT AMOUNT	\$30,000

TYPES OF GLOBAL GRANTS

- Humanitarian Projects – Ed Walsh
- Vocational Training Teams (VTT) – Robert Rapp
- Global Scholarship - Tom Cardwell



Note: A Global Grant can be a combination of any of these types of grants.

RESOURCES

- District Leadership Team
- District Foundation Team
- Assistant Governors
- Rotary.org / My Rotary
- www.rotarydistrict5650.org
- Remaining GMS Webinars
- Rotary Leadership Institute

QUESTIONS



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***THANKS FOR ALL YOU DO
FOR ROTARY AND
THE ROTARY FOUNDATION***

