

The
Rotary
Foundation



GRANT MANAGEMENT SEMINAR

2024-25

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.

16 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
 - Tom Kerfoot DG
 - Robert Rapp DGE
- District Foundation Team
- Assistant Governors
- All found on the District 5650 Website



TODAY'S AGENDA

- Club & Member Qualification and Certification
- 2024-25 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

2021-22

**Contributions
to The Rotary Foundation
Annual Fund**

1

yr

2022-23

**Funds
Invested**

2

yr

2023-24

**Funds
Invested**

3

yr

2024-25

**Funds
Available for
Projects**



DISTRICT DESIGNATED FUNDS

2024 – 25 Rotary Year

Annual Fund Contributions from 2021-22: \$200,900

District Designated Funds for 2024-25: \$100,450

Half of the DDF goes to each area below:

**DDF for
District Grants
\$50,225**

**DDF for
Global Grants
\$50,225**

RESOURCES



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

- Documentation
 - Basic Information
 - Certification Requirements
 - Forms
- Announcements

RESOURCES



About Us -

Exchange Ideas -

Learning & Reference -

The Rotary Foundation -

My District -

Calendar

Directory

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

The Rotary Foundation Information and Forms

Donate to The Rotary Foundation

The Rotary Foundation Centennial

Grants

Polio



DISTRICT GRANTS - BASIC INFORMATION

Contact: districtgrants@rotarydistrict5650.org

[Click here](#) for a printable copy of this Basic Information.

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 Grants then 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

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](#), at rotary.org/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
5. Be reviewed and approved by the Foundation before being implemented. Do not reimburse clubs or districts for activities and expenses that are in progress until a grant is approved. We encourage you to plan for activities before a grant is approved, but do not use grant funds to alter a project after a grant is approved, the Foundation also needs to approve any changes 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 of expenses allowed within the project management allocation for global grants
9. Unrestricted cash donations to a beneficiary or cooperating organization
10. Activities for which the cost has already been incurred
11. Transportation of vaccines over national borders without prior approval of appropriate government and regulatory authorities in the originating and recipient countries



MEMORANDUM OF UNDERSTANDING



Club Qualification Memorandum of Understanding 2024-25 Rotary Year

The Rotary Foundation
Rotary District 5650

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds

1. Club Qualification

To participate in Rotary Foundation grants, which includes global participating club, all clubs agree to:

- A. Execute and submit this Memorandum of Understanding (MOU)

Authorization and Agreement

This memorandum of understanding is an agreement between the Club and the District and acknowledges that the club will undertake measures to ensure the proper implementation of grant activities and proper management of Foundation grant funds. By authorizing this document, the Club agrees to comply with all of the conditions and requirements of this MOU.

On behalf of the Rotary Club of: [REDACTED], the undersigned agree to comply with all of the conditions and requirements of the MOU for Rotary Year 2023-24 and will notify Rotary International District 5650 of any changes or revisions to club policies and procedures related to these requirements.

REQUIRED SIGNATURES:

(Be sure to enter the club name in the above paragraph.)

Club President 2023-24	
Printed Name	[REDACTED]
Signature	
Date	[REDACTED]

Club President 2024-25	
Printed Name	[REDACTED]
Signature	
Date	[REDACTED]

+ ADDITIONAL SIGNATURES – ONLY IF REQUESTED BY THE DISTRICT:

Title	[REDACTED]
Printed Name	[REDACTED]
Signature	
Date	[REDACTED]

Title	[REDACTED]
Printed Name	[REDACTED]
Signature	
Date	[REDACTED]

CERTIFICATION

STATUS OF CLUB AND MEMBER CERTIFICATION FOR 2023-24 GRANTS - ROTARY DISTRICT 5650

As of 5-31-23

2023-24 Goals

	Club		Set in Rotary				
	Certified	MOU	Club Central	4/12/2023	4/25/2023	5/4/2023	5/16/2023
Ashland	5/26/2023	5/26/2023	5/26/2023		Janece	Jeff	
Beatrice	5/30/2023	5/30/2023	5/24/2023	Arvid, Jessica			
Bellevue Papillion	5/25/2023	5/1/2023	5/25/2023	Charles, Jeff	Joe		
Blair	5/16/2023	5/2/2023	5/2/2023		Bob		Ron
Council Bluffs Centennial	5/17/2023	5/17/2023	4/29/2023				Craig, Brian
Council Bluffs Noon	4/29/2023	4/17/2023	4/29/2023	Cieandra, Chris			
Crete	5/20/2023	5/20/2023	5/20/2023		Janelle	Jack	Karen
David City	5/25/2023	5/25/2023	5/23/2023		Ed		Chas
Fairbury	5/23/2023	5/23/2023	5/18/2023		Laura	Lana, Greg	
Falls City	5/25/2023	5/25/2023	5/24/2023			Katherine	Rick, Catherine
Fremont	5/24/2023	5/24/2023	5/23/2023				Carter, Janell, Pam
Glenwood	5/19/2023	5/19/2023	5/19/2023	Joe	Pat		
Lincoln #14	5/11/2023	5/4/2023	5/11/2023			Eric, John, Landon	Christine, Erin
Lincoln Giving Spirits Evening	5/28/2023	5/28/2023	5/25/2023				Jessica, wayne
Lincoln South	5/22/2023	4/28/2023	5/22/2023		Suzanne	Mary	
Norfolk	5/9/2023	5/9/2023	4/29/2023	Andy, Christine			
Omaha Downtown	5/26/2023	5/26/2023	4/29/2023				Bill, Heather, Larry, Lisa
Omaha Millard	5/24/2023	5/24/2023	5/11/2023	Forrest, Puja			
Omaha Night	5/17/2023	5/17/2023	5/14/2023	Karalee	Ginny		
Omaha Suburban	5/18/2023	5/18/2023	5/11/2023	Dan	Jennifer		Dave
Omaha West	5/18/2023	5/18/2023	4/29/2023	Rebecca			Bree, Elizabeth
Red Oak	5/18/2023	5/15/2023	5/18/2023	Carrie		Anne	
Seward	5/24/2023	5/24/2023	5/24/2023			Bonnie, John, Marla	
Shenandoah	5/2/2023	5/2/2023	5/1/2023	Jon	Mike		
Wayne	5/18/2023	5/18/2023	5/11/2023	Bob		Barb	
York	5/30/2023	5/25/2023	5/30/2023			David	Steven

If a club is not shown, they have not completed any of the requirements for certification or notified us that they will not participate in District Grants this year.

The
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DISTRICT GRANTS

DISTRICT GRANTS-MATCHING FUNDS 2024-25



- Amounts for District Grant Projects
 - 1.50:1 Club Contribution / District Match
 - Single Club District Grant Projects
 - \$1,500 from club for Maximum Match (Clubs can invest more but the max match will be \$2,250)
 - \$500 - Minimum Amount from Club (matched of \$750 to make a \$1,250 project)
 - Multi-Club District Grant Projects
 - \$9,000 Maximum Match (Clubs can invest more than \$6,000 but the max match will be \$9,000)
 - at least 4 Clubs must participate in order to receive the maximum match
 - \$2,250 - Maximum Match is basis (Clubs can invest more but the max match will be \$2,250)
 - if 3 Clubs, the maximum match would be \$6,750, 2 Clubs, max would be \$4,500
 - No maximum for any club – just a maximum for the project
 - \$300 Minimum from any Club

DISTRICT GRANTS – FUNDS REQUESTED

- What if funds requested exceeds funds available?
- Criteria used to select projects may include (not limited to):
 - Multiple applications – clubs may be asked to prioritize or reduce the amount of the match
 - New projects may be given priority.
 - The club's 3-year average for per capita giving to the annual fund will be considered

DISTRICT GRANTS

- Local community projects
- Relate to the mission of The Rotary Foundation (TRF)
- Include active participation of Rotarians
 - Not a general donation, capital campaign
 - Pay for specific items after purchase
 - Not able to give a check for periodic future purchases
- Repeat projects may be submitted and will be considered by the District Grant Committee
- Scholarships are ineligible for District Grants



DISTRICT GRANTS – ONLINE APPLICATION

- Log in to District Website
- “Member Area”
- “Grants”
 - This is called “the Grants Module”
- “Submit a Grant Request”
 - Information requested
 - Determination of Need
 - Sustainability



DISTRICT GRANTS – ONLINE APPLICATION

Project Name:*

Please select the year this project will be completed. Once selected, the year cannot be changed.

Project Year:*

Country

United States of America v

State

Nebraska v

Zip Code

68506

City:

Lincoln

Description:*

Estimated Budget:

Cancel

Submit



DISTRICT GRANTS – ONLINE APPLICATION



Details Application Budget Documents Project Overview Individual Project Report Activity Log

- Select Application
- Edit and Save what you typed in each section (shown here)
- Complete all sections

- ▶ General Description
- ▶ Community Assessment & Impact
- ▶ Sustainability
- ▶ Cooperating Organizations
- ▶ Implementation Plan

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 / invoices required for all expenditures prior to payment
- Project expenses may not be incurred before the project is approval by Rotary International















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 – TRANSACTION SPREADSHEET

	A	B	C	D	E	F
1	ABC Rotary Club District Grant 2024-25					
2		Deposit	Check	Balance	inv/Rcpt	
3	7/1/2023			\$3.01		Balance (Beginning)
4	7/19/2023	\$1,875.00		\$1,878.01		Rotary District ACH
5	7/31/2023			\$1,878.01		Balance (ending)
6	8/31/2023			\$1,878.01		Balance
7	9/30/2023			\$1,878.01		Balance
8	10/31/2023			\$1,878.01		Balance
9	11/1/2023			\$1,878.01		Balance (Beginning)
10	11/25/2023	\$1,500.00				ABC Rotary Club Deposit
11	11/30/2023			\$3,378.01		Balance (ending)
12	11/15/2023		-\$2,289.23	\$1,088.78	Menards	Check 134
13	12/31/2023			\$1,088.78		Balance (ending)
14	1/1/2024			\$1,088.78		Balance (Beginning)
15	1/5/2024		-\$588.33	\$500.45	Amazon	Debit Card
16	1/22/2024		-\$497.55	\$2.90	Ace	Check 135
17	1/31/2024			\$2.90		Balance (ending)
18						

DISTRICT GRANTS – LABELING DOCUMENTS

▼  Financial Documents	Mar. 15, 2024
▼  Bank Statements	Mar. 15, 2024
 2023_0731_Statement Ending_With District ACH	Mar. 30, 2024
 2023_0831_Statement Ending	Mar. 30, 2024
 2023_0930_Statement Ending	Mar. 30, 2024
 2023_1031_Statement Ending	Mar. 30, 2024
 2023_1130_Statement Ending_With Club Deposit	Mar. 30, 2024
 2023_1231_Statement Ending_With Check Images	Mar. 30, 2024
 2024_0131_Statement Ending_With Check Images	Mar. 30, 2024
▼  Invoices and Receipts	Mar. 15, 2024
 Ace Receipt	Mar. 30, 2024
 Amazon Receipt	Mar. 30, 2024
 Menards Receipt	Mar. 30, 2024
 Project Transaction Spreadsheet	Mar. 30, 2024

DISTRICT GRANTS – PROJECT TIMELINE

- **May 31, 2024** – Deadline to submit online applications
- **June 2024** – District committee reviews project applications, submits Spending Plan to TRF for approval
- **July/August 2024** – Grant project approval notification; funds received from TRF and disbursed to clubs; projects can begin
- **December 31, 2024** – Interim report due
- **March 31, 2025** – Project completion deadline and final report due

PROJECT TIMELINE – OTHER ORGANIZATIONS

- Be sure the everyone understands Rotary's timeframes and requirements.
 - Project expenses cannot be incurred until project is approved by Rotary International.
 - 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.



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?



DISTRICT GRANT PROJECT HISTORY

District Grant Projects

2022-23 District Grants In Review

2021-22 District Grants In Review

2020-21 District Grants In Review

2019-20 District Grants In Review

2018-19 District Grants In Review

2017-18 District Grants In Review



Rotary District 5650 Grants 2022-23

In Review

Statistics:

- \$46,944 – available matching funds
- \$35,318 – grant funds requested for club projects and forwarded to Rotary International; the remainder to support the District Project
- 24 Club Projects submitted to the District Grants Committee and forwarded to Rotary International
- 27 Clubs represented
- Some clubs submitted multiple projects; Some projects included multiple clubs

Ashland – Disc Golf Upgrades - \$1500

Beatrice – Veteran’s Memorial Park Lighting - \$1500

Bellevue Papillion – RISE Reentry Program - \$1500

Blair – High School Skills Academy - \$500

Blair – Midweek Meal Program - \$1000

Columbus Morning – Loup River Water Trail - \$1500

Columbus Morning - CCC/PVLA Volunteer Support and Signage - \$1500

Columbus Noon – Little Free Library - \$687

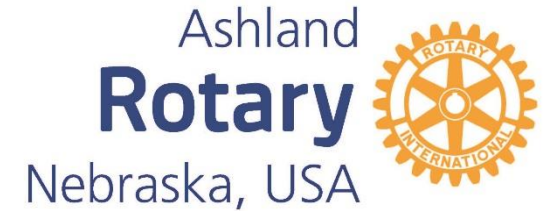
Council Bluffs Noon, Council Bluffs Centennial – Bike Racks for Park Updates - \$3,000

Crete – Tree Planting - \$1000

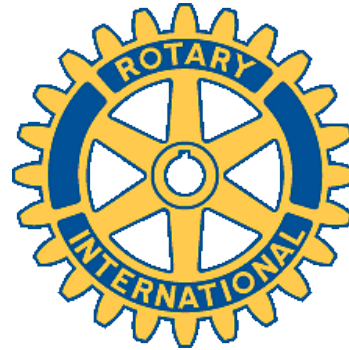


ROTARY BRAND

- 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



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 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

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

TYPES OF GLOBAL GRANTS

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



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

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