

GRANT MANAGEMENT SEMINAR

2025-2026



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



Tom Kerfoot

District 5650 Rotary Foundation Committee Chair



Nicki Klein

District 5650 District Grants Chair



DISTRICT LEADERSHIP

- District Leadership Team
 - Robert Rapp DG
 - Gretchen Bren DGE
- District Foundation Team
- Assistant Governors
- All found on the District 5650 Website





TODAY'S AGENDA

- Club & Member Qualification and Certification
- 2025-26 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

2022-23

Contributions
to The Rotary Foundation
Annual Fund

2023-24

Funds Invested 2024-25

Funds Invested 2025-26

Funds
Available for
Projects

1 yr







DISTRICT DESIGNATED FUNDS

2025 – 26 Rotary Year

Annual Fund Contributions from 2022-23: \$200,000 District Designated Funds for 2025-26: \$100,000 Half of the DDF goes to each area below:

DDF for District Grants \$50,000

DDF for Global Grants \$50,000





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

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





About Us -

Exchange Ideas -

Learning & Reference -

The Rotary Foundation -

My District -

Calendar

Directory

WELCOME TO THE GRANTS PAGE

The Rotary Foundation Information and Forms
Donate to The Rotary Foundation
The Rotary Foundation Centennial
Grants
Polio
The
Rotary

GRANTS

Welcome to Grants

Welcome to the Grants Page

Forms / Instructions - 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 Money Management

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)
- 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
- Application, reports, supporting documents, etc. will be attached through the District Website online application module screens by the Clubs
- 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
 - reimbursement for expenses previously incurred
 - c. supporting fundraising in any way
 - d. unrestricted cash donations to a beneficiary
 - e. Review the Terms and Conditions for all restrictions and other guidelines



District Grants Money Management

Sample Project Transaction Spreadsheet

Rotary District 5650 District Grants - Frequently Asked Questions and Instructions

District Grants - Club Worksheet

Project Report Instructions

2025-26 District Grants

2025-26 Memorandum of Undersatnding

- c. supporting runaraising in any way
- d. unrestricted cash donations to a beneficiary
- e. Review the Terms and Conditions for all restrictions and other guidelines
- 6. District 5650 has added these criteria for District Grant Projects
 - a. Local community projects only projects must be conducted in, and for the benefit of, communities in District 5650
 - b. Scholarships for high school students to attend college are ineligible
 - c. Projects must provide service to a group they are not intended for support of an individual
 - d. unrestricted donations not allowed capital campaign, funds in advance to purchase items as needed
- 7. Detailed financial documentation is required, including receipts for every individual item purchased
- 8. Amounts for District Grant Projects THE FOLLOWING IS FOR 2025-26:
 - a. 1.25:1 District Match (1.25) to Club Contribution (1)
 - b. Single Club District Grant Projects
 - \$1,500 from club for Maximum Match (Clubs can invest more but the max match will be \$1,875) to make a project of \$3,375
 - 2. \$500 Minimum Amount from Club (matched of \$625 to make a \$1,125 project)
 - c. Multi-Club District Grant Projects
 - 1. \$7,500 Maximum Match (Clubs can invest more than \$6,000 but the max match will be \$7,500)
 - \$1,875 Maximum Match is basis (Clubs can invest more but the max match will be \$1,875)
 - 1. at least 4 Clubs must participate in order to receive the maximum match
 - 2. if 3 Clubs, the maximum match would be \$5,625, 2 Clubs, max would be \$3,750
 - No maximum for any club just a maximum for the project.



- 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 <u>Terms and Conditions for Rotary Foundation Global Grants</u>, at <u>rotary.org/grants</u>.

1. ELIGIBLE ACTIVITIES



- Review documents
- Adherence is required
- Review the Frequently Asked Questions
- Project Report Guidelines are outlined



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 Money Management

Sample Project Transaction Spreadsheet

Rotary District 5650 District Grants - Frequently Asked Questions and Instructions

District Grants - Club Worksheet

Project Report Instructions



MEMORANDUM OF UNDERSTANDING



Club Qualification Memorandum of Understanding 2025-26 Rotary Year

The Rotary Foundation Rotary District 5650

- 1. Club Qualification
- 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

On behalf of the Rotary Club of :	, the undersigned agree to comply with all
of the conditions and requirements of the MOU for Re	otary Year 2025-26 and will notify Rotary International
District 5650 of any changes or revisions to club poli	cies and procedures related to these requirements.
REQUIRED SIGNATURES:	
(Be sure to enter the club name in the above paragrap	ph.)
Club President 2024-25	Club President 2025-26
Printed	Printed
Name	Name
Signature	Signature
Date	Date

ADDITIONAL SIGNATURES - ONLY IF REQUESTED BY THE DISTRICT:

Title	
Printed	
Name	
Signature	
Date	

Title	
Printed	
Name	
Signature	
Date	
Printed Name Signature	



Sign and Scan the completed Memorandum of Understanding to: DistrictGrants@rotarydistrict5650.org.

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		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.





DISTRICT GRANTS



DISTRICT GRANTS-MATCHING FUNDS 2024-25

Amounts for District Grant Projects



- 1.25 to 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 \$1,875)
 - \$500 Minimum Amount from Club (matched of \$625 to make a \$1,125 project)
- Multi-Club District Grant Projects
 - \$7,500 Maximum Match (Clubs can invest more than \$6,000 but the max match will be \$7,500)
 - Up to 4 Clubs can participate in order to receive the maximum match
 - if 3 Clubs, the maximum match would be \$5,625 2 Clubs, max would be \$3,750
 - 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

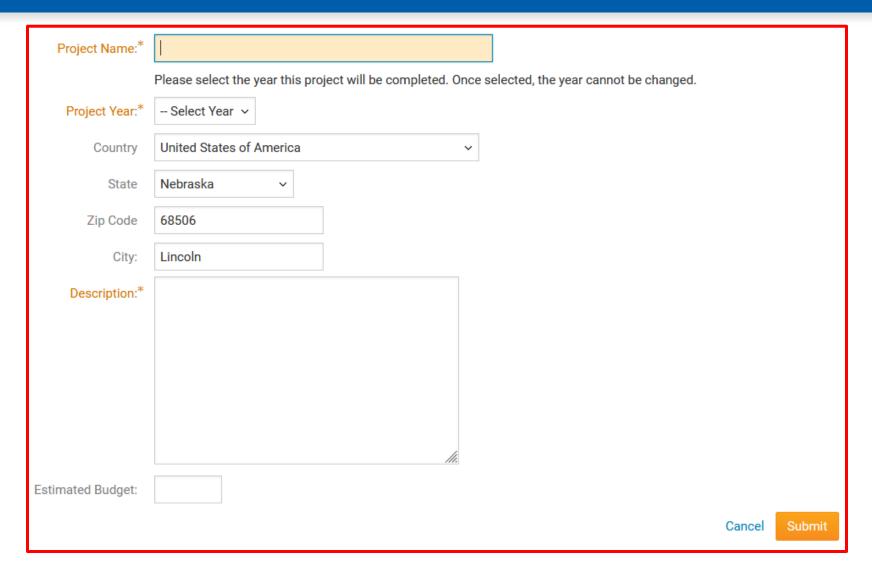
- Log in to District Website
- "Member Area"
- "Grants"
 - This is called "the Grants Module"
- "Submit a Grant Request"
 - Information requested
 - Determination of Need
 - Sustainability







DISTRICT GRANTS – ONLINE APPLICATION





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

4	А	В	С	D	Е	F	
1	ABC Rotary C	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, 2025 Deadline to submit online applications
- June 2025 District committee reviews project applications, submits Spending Plan to TRF for approval
- July/August 2025 Grant project approval notification; funds received from TRF and disbursed to clubs; projects can begin
- December 31, 2025 Interim report due
- March 31, 2026 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 thirdparty 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

2024-25 District Grant Projects Funded

2023-24 District Grants In Review

2022-23 District Grants In Review

2021-22 District Grants In Review

2020-21 District Grants In Review



Rotary District 5650 Grants 2023-24

In Review

Statistics:

- \$53,450- available matching funds
- \$50,550 grant funds requested for club projects and approved by Rotary International
- 29 Club Projects submitted to the District Grants Committee and forwarded to Rotary International
- 26 Clubs represented
- Some clubs submitted multiple projects; Some projects included multiple clubs

Ashland – AYBA Portable pitcher mounds-\$1875

Beatrice - Beatrice Mini Market- \$1875

Bellevue Papillion – Providing a Place to Rest-\$1875

Blair – Little League Restroom Renovation-\$1875

Council Bluffs Noon, Council Bluffs Centennial

– Food Delivery Truck- \$3750

Council Bluffs Noon– Toasty Toes – warm footwear for low-income- \$1000

Crete – Sixpense Program – Educational materials for at risk students - \$1250











ROTARY BRAND

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











INCORRECT USE OF LOGO















GLOBAL GRANTS

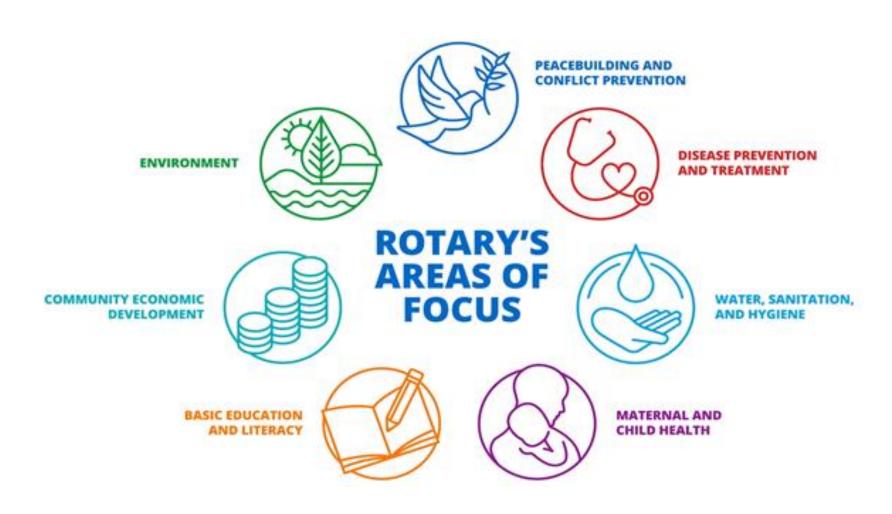


A GLOBAL GRANT MUST:

- 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.



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



QUESTIONS







THANKS FOR ALL YOU DO FOR ROTARY AND THE ROTARY FOUNDATION

