

# GRANTS QUALIFICATION TRAINING



# Greeting from the District Governor



Cindy Rold  
Rotary Club of Littleton

# Rotary District Foundation Chair

Mike Klingbiel

Rotary Club of Denver Southeast



# Agenda

- 9:00 DGE Cindy Rold Welcome
- 9:10 Foundation – Mike Klingbiel
- 9:40 District Grants – Bonnie Thomas
- 10:25 Break
- 10:35 Global Grants – Bob Kemp
- 11:20 Club Qualification
- 11:30 Questions/Club Collaboration
- 12:00 Adjourned

# The Rotary Foundation – Your Foundation

**Bill Fine PDG 14-15 District 7620**

Current Member Westminster Rotary Club

Major Donor Plus 2



**Mike Klingbiel**

Kibera



# The Rotary Foundation – Your Foundation





# The Rotary Foundation – Your Foundation



The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace by improving health, providing quality education, and alleviating poverty. More than 100 years ago, Rotarians took bold action to empower generations to come – they established The Rotary Foundation to secure a better future.

# The Rotary Foundation – Your Foundation

Today still, The Rotary Foundation transforms gifts into projects that change lives close to home and around the world. As the charitable arm of Rotary, the Foundation ensures that projects are high-impact and sustainable and meet the most pressing needs of the communities they serve. Strong financial oversight, a stellar charity rating, and a unique funding model mean that Rotary makes the most of your contributions.



# The Rotary Foundation



## **Our Rotary Vision**

Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves.

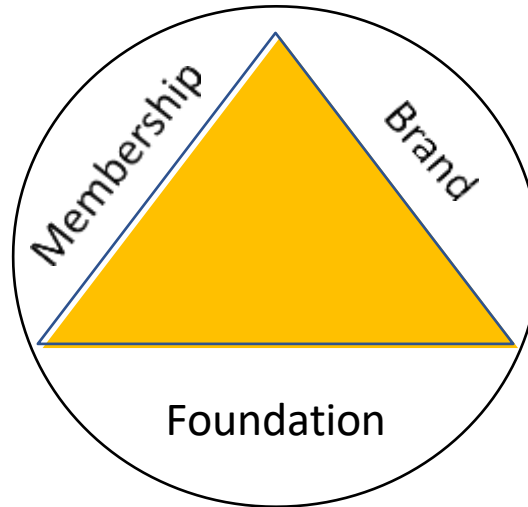
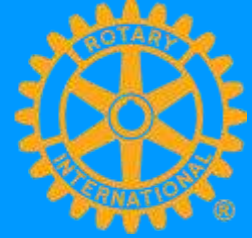
## **Our Rotary Foundation Mission**

The Rotary Foundation helps Rotarians to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty.



# The Rotary Foundation

The  
**Rotary**  
Foundation



## CONNECTIONS

**Rotary**  
District 5450



**Rotary**



Zones 26 & 27  
Big West

Mike Klingbiel, Rotary District 5450 Foundation Chair

**Rotary**  
District 5450



# The Rotary Foundation



- Primary funding source for Foundation grants and activities
- Supports local and international grants through the SHARE system
- Contributions are credited to the donor's club and applied to the club's Annual Fund goal
- Contributions are professionally invested
- Only the earnings are spent

# The Rotary Foundation



- All Rotary Grants (District Designated and Global) depend on Annual Fund contributions made to The Rotary Foundation. Contributions made 3 years ago provide the District Matching Funds for Rotary Grants
- For the 16th consecutive year, The Rotary Foundation has received the highest rating — four stars — from Charity Navigator, an independent evaluator of charities in the U.S. 90% Program Awards 100% Rating

# Take Action



- Talk with your district Rotary Foundation committee chair or DISC about a future project.
- Read the [Guide to Global Grants](#)
- Review the [Community Assessment Tools](#)
- Work with your District International Service Committee, Technical Cadre or your district Rotary Foundation committee chair to improve the quality, impact, and sustainability of your global grant projects.
- Go to [Rotary Showcase](#) and Rotary magazine for project and partnership help.

# District Grants vs Global Grants

## **District Designated Fund Grants (DDF)**

- Local Humanitarian Projects (service)
- International Humanitarian Projects

## **Global Grants (GG)**

- International Humanitarian Projects – Seven Areas of Focus
- Vocational Training Teams
- Rotary Scholar Programs
  - Rotary Scholar - \$15,000
  - Rotary Peace Scholar - \$25,000
  - Temple Buell Scholarship - \$30,000

# Supporting The Rotary Foundation



Rotary's tomorrow depends  
on what we do today.

– *Arch C. Klumph*

- Use a gift to honor or remember someone.
- Increase your impact with corporate matching.
- Start a fundraiser on Raise for Rotary.
- Leave a Legacy or Endowment Gift becoming a member of the Bequest Society.
- Go meet with Robert Mintz and his team!!!!







**QUESTIONS**

# District Grants Chair

Bonnie Thomas  
Rotary Club of Denver Southeast



# Why we are here...



# 2024-2025 Snapshot

- \$115,434 DDF granted
- 42 Grants awarded
- 59% international projects
- 41% local community projects
- \$438,486 is the total amount for District Grant projects



# What we will cover today

- What is a District Grant?
- How do clubs become eligible?
- What projects are eligible?
- What projects are not eligible?
- Important changes

# What is a District Grant?

- Humanitarian project
- Short term (one year)
- Either local or international
- Intended for smaller projects (i.e. not global scale)
- District Grant Funds (DDF) come from the Rotary Foundation (TRF) based on District contributions 3 yrs earlier
- District responsible for administering

# How to Qualify

Club's qualification to submit a grant:

- Club President attends a **President-Elect Training Seminar (PETS)** or an approved alternative
- Club member **attendance at District Grants Qualification Training**
- **District MOU signed** by club president and president-elect & submitted to District Operations Manager
- Club IRS Form **990 submitted** to District Operations Manager
- **Reporting** on prior Rotary grants **up to date**

**NOTE:** *Club Qualification must be repeated every year.*



# Rules for Grants Activities & Exclusions

- Activities must comply with laws, be reviewed and approved BEFORE implementation, be completed within 12 months, be started within 90 days of approval
- What is not eligible? Continuous excessive support; purchase or construction of land or buildings; fundraising; or microcredit projects. See handout for others.

Handouts and [www.rotary5450.org](http://www.rotary5450.org)

# How to Apply

- Submit a Grant Request
- Submit the Grant Application, including budget and cooperating organization MOU
- Watch for emails from the Grant Committee who may request further information, clarification or other information related to the grant application

# How Grants are approved and when

1. District String (District Governance group and Foundation Chair) Approval, vote typically takes 1 – 7 days
  - Any questions that arise at this stage will have to be addressed by the project champions and/or the Club.
2. The club is notified of the outcome of the vote.
3. Please note that all communications related to your grant will be done using the email listed on the grant application form.

# Other Considerations

- Cooperating Organizations
- Beneficiary
- OFAC – Office of Foreign Assets Control (may be needed for international projects)
- Final Reporting
- Receipts and bank statements

# Grant Limits

**Grant Limit:** The maximum DDF that may be requested for each District Grant is determined by the number of clubs contributing to the Grant:

- \$3,000 if there is only one club
- \$4,000 if there are two clubs
- \$5,000 if there are three clubs
- \$6,000 if there are four or more clubs

# District Grant Disclaimer

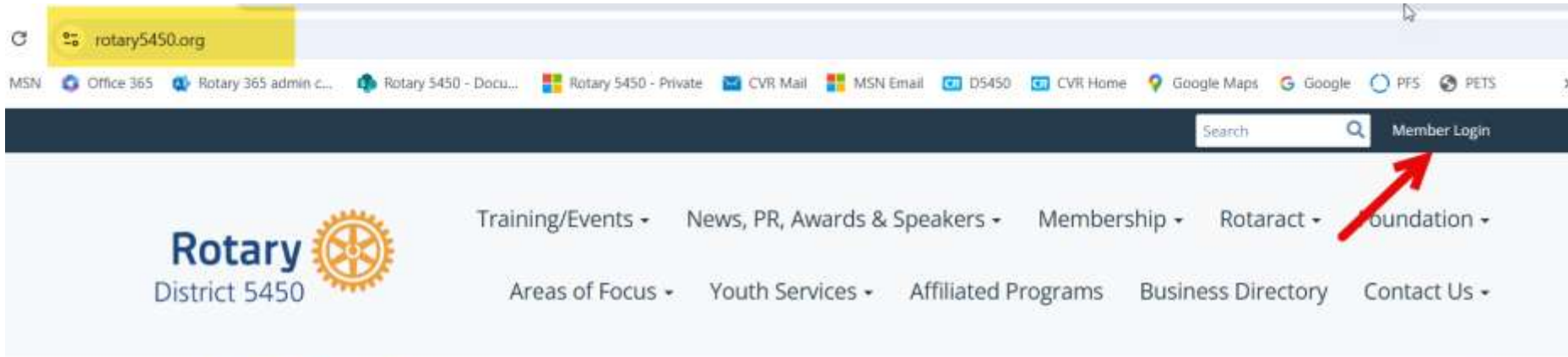
- Disclaimer: submission does not guarantee approval
- Application must pass the review process within 90 days of submission or re-apply
- The project must be started within 90 days of approval (unless a special exemption is granted)

# District Grant Documentation Changes

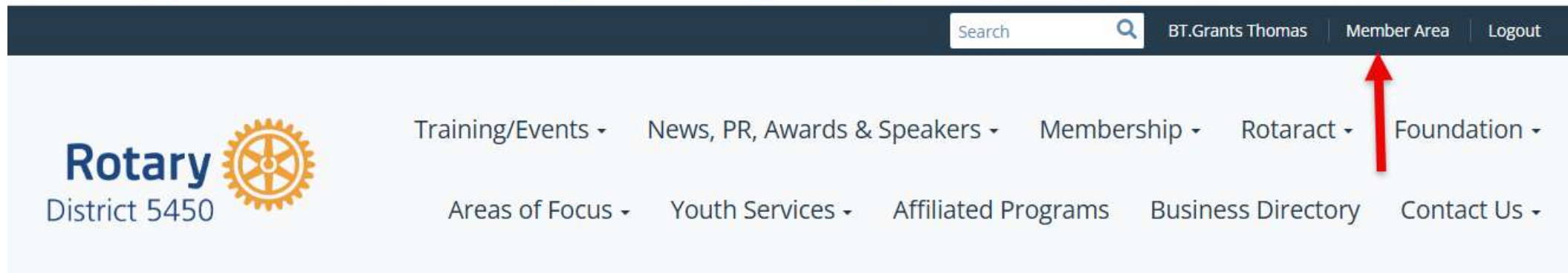
- DDF/Cash Form is no longer required
- A MOU is no longer required from ANY Rotary Club partner
- NOTE: A MOU is still required for Cooperating Organizations



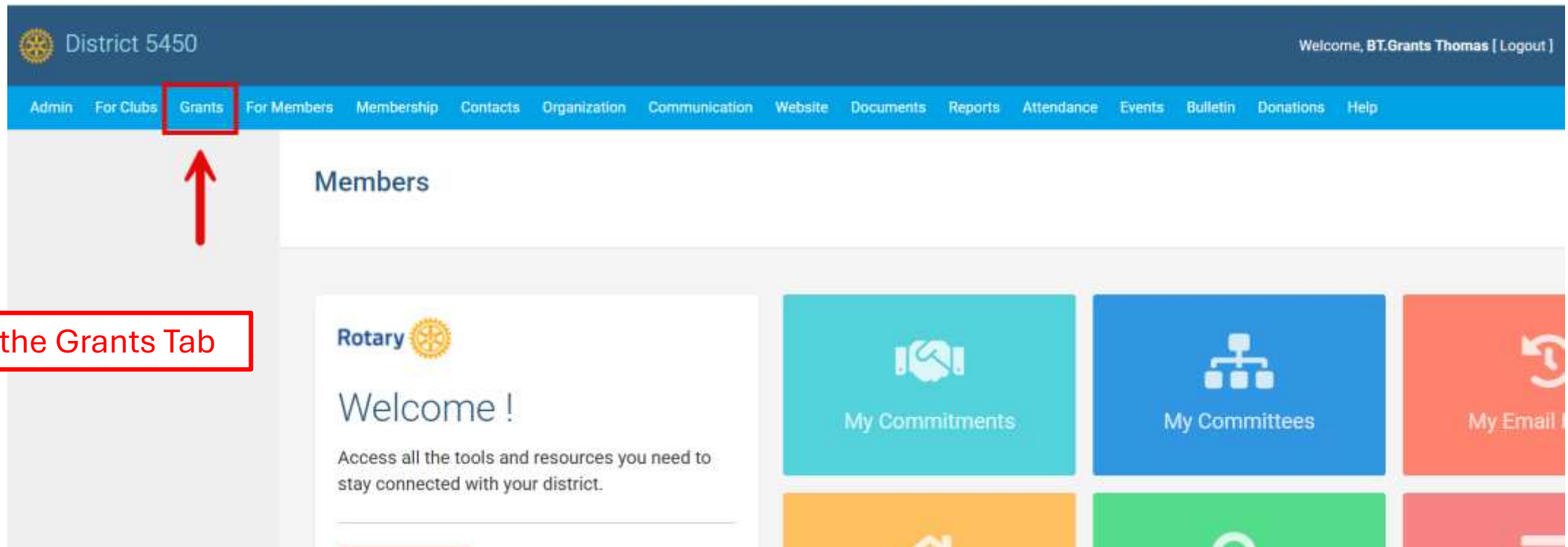
# How to Enter a Grant Request



- [www.rotary5450.org](http://www.rotary5450.org)
- Log In
- Click Member Area if shown

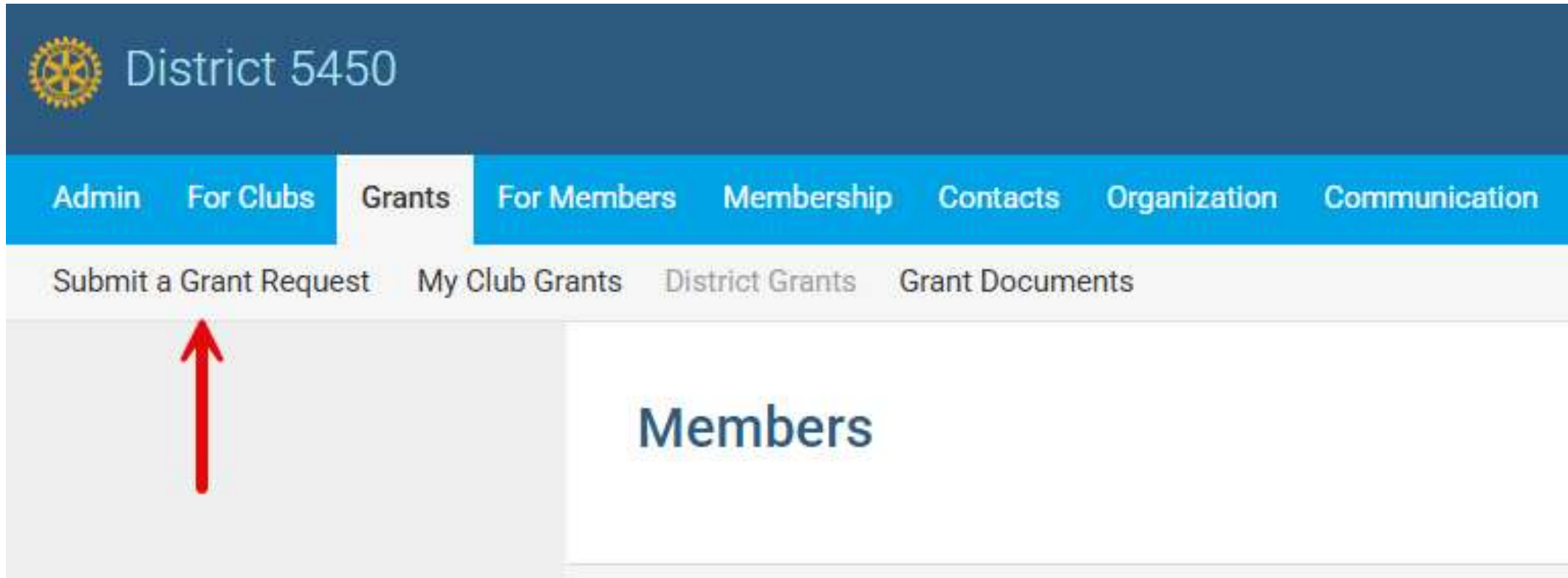


# How to Enter a Grant Request



- Click the Grants Tab

# How to Enter a Grant Request



- Click Submit a Grant Request

# Grant Request Form

## Submit a Grant Request

Please enter the basic information relating to your Grant Request below.


If you are submitting a grant request on behalf of multiple clubs, you only need to submit this form once, and there must be one main sponsoring club. Enter the estimated budget requested at this stage; you will be able to refine this number later on in the application process once this initial request has been submitted and reviewed.

Note that you will need to be a certified member in order to submit a request. If you do not have the proper access, please contact the District Grants committee.

### Project Details

Project Name:	<input type="text"/>
Project Year:	<div>Please select the year this project will be completed. Once selected, the year cannot be changed. -- Select Year --</div>
Country	<div>United States of America</div>
State	<div>Colorado</div>
Zip Code	<div>80530</div>
City:	<div>Frederick</div>
Description:	<div></div>
Estimated Budget:	<div></div>

# Grant Application

 District 5450Welcome, BT.Grants

AdminFor ClubsGrantsFor MembersMembershipContactsOrganizationCommunicationWebsiteDocumentsReportsAttendanceEventsBulletinDonationsHelp

Submit a Grant RequestMy Club GrantsDistrict GrantsGrant Documents

GrantsView Club GrantsSubmit a Grant RequestDocumentsDistrict Grant DocumentsHelpGrants Module

Grant Request Applications

« Previous Year | 2025 - 26 | Next Year »

Any Status

Filter by Status:

Submitted	Project Name	Sponsoring Club	Estimated Budget
Initial Request Submitted			
May 21, 2025	Dictionaries for 3rd Graders	Carbon Valley	\$3,000.00

# Grant Application

## Dictionaries for 3rd Graders

**Grant Project:** Dictionaries for 3rd Graders  
**Primary Sponsoring Club:** Carbon Valley  
**Contact:** Thomas, BT.Grants  
**Date Submitted:** May 21, 2025 at 4:35 p.m.  
**Project Total Budget:** \$3,000.00  
**Project Total Financing:** \$0.00  
**Requested Grant Amount:** \$0.00

Status: Initial Request Submitted

Cancel Grant

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived



Welcome to our new District Grant Application! Please be sure to read all the information provided here **before** you start working on the application. District 5450 [District Grants Terms and Conditions](#).

### To Complete Your Grant You Will Need:

- the project budget (not a separate form, but embedded in application)
- list of cash and DDF contributions by club (not a separate form, but embedded in application) **Note:** We no longer need a signed form from each participating club.
- Your club's mailing address (for a grant check to be sent from the district).
- If you have a cooperating organization you will need a Memorandum of Understanding (MOU). [Click here to find a sample MOU.](#)

Click on any of the tabs below to access and update the various sections of this Grant application. The application, budget and documents (if applicable) are required. The 'Project Overview' tab allows you to see your entire application and print it. The 'Individual Project Report' is used for the final report.

### Read This!!!

When you have completed your application, budget, etc, you won't need to "submit" it. It is automatically sent to the grant administrator for review. You will get an email back as to next steps or for approval after the review.

To complete each section of the application, click on the [blue EDIT](#) button in the lower left corner of the section.



# Grant Application

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

## General Description

Please include:

1. The project title and the need it will address.
2. Who the beneficiaries are and approximately how many.
3. Include the estimated start and end time for the project. The project will be complete by the end of the Rotary year
4. Address any **Conflict of Interest**.
5. Provide name, email and phone number of the Grant Champion. If there is additional information required under the "Document" tab, please upload those documents before submitting the application.
6. Provide your club's mailing address. Where should your grant check be sent?

**It's helpful to copy and paste the above questions into the dialogue box that appears when you click EDIT.**

[Edit](#)

Community Assessment & Impact

Sustainability

Cooperating Organizations

Implementation Plan



# Grant Application Expected Expenses

## Expected Expenses

In the area below, enter the total anticipated expenses (budget) for this project. You do not need to add sales tax.

[+ Add A Budget Item](#)

Description	Supplier	Local Amount	Currency	Tax	Total	Amount	Actions
CV Rotary Name Plates	ABC Printing	\$100.00	USD	\$0.00	\$100.00	\$100.00	<input type="button" value="v"/>
Stickers	Uprinting.com	\$150.00	USD	\$0.00	\$150.00	\$150.00	<input type="button" value="v"/>
Dictionaries	The Dictionary Project	\$2,750.00	USD	\$0.00	\$2,750.00	\$2,750.00	<input type="button" value="v"/>
Total:						\$3,000.00	

# Grant Application Budget Financing (Income)

## Expected Income

List all anticipated income for this project, including funds that will be contributed by the sponsoring club, other District 5450 Rotary Clubs, partners and the District grant portion (DDF). Note: The DDF amount requested by each club cannot exceed the cash donation from that club. For example, if a club donates \$2000 cash, the DDF request cannot exceed \$2,000. The maximum DDF allowed per grant per club is \$3000 and would need at least a \$3000 cash donation as well. **Note: The maximum DDF per grant is \$6000.**

- When entering the amount of DDF you will check the box entitled "District Grant"
- When funds are from another source or Rotary club you will check the Club/other box.
- If a club provides both cash and DDF the amounts are entered separately (see above).

[+ Add Project Financing](#)

Description	Funding Source	Amount	%	Actions
Carbon Valley RC	Club/Other	\$1,500.00	50.000%	<input type="checkbox"/>
	District Grant	\$1,500.00	50.000%	<input type="checkbox"/>
Total:		\$3,000.00	100.000%	



**QUESTIONS**

# Global Grants Chair

**Bob Kemp**

District 5450 International Service Chair

Rotary Club of Denver Mile High



# Global Grants Overview

A Global Grant is a Rotary Foundation-funded project that creates **sustainable, measurable change** in one of Rotary's seven Areas of Focus. These grants typically:

- Involve partnership between clubs in **two countries**
- Have a **minimum total project budget of \$30,000**
- Require **both clubs to be qualified** and actively involved
- Are **administered by The Rotary Foundation**.

# Club Roles & Partnership

## Two Key Partners:

- **Host Club** (in project country): Manages implementation, engages local partners
- **International Club**: Supports fundraising and often helps with reporting
- Both clubs share responsibilities and planning

# Start with the Community

## Conduct a Community Needs Assessment

- Ask: *What does the community need?*
- Involve all stakeholders: local leaders, governments, NGOs
- Ensure alignment with Rotary's **Areas of Focus**
- Build local buy-in and sustainability

# Project Planning & Budgeting

## Plan for Impact

- Define **goals** (output + outcome-based)
- Create a **detailed budget** with real quotes
- Include up to 10% for project management, outcomes measurement, and contingency
- Use **competitive bidding** where possible



# Funding & DDF Matching

## District 5450 Incentives

- **Approximately \$180,000 available** for Global Grants in 2025–26
- Matched at **1.5:1** for District 5450-sponsored projects
  - \$1,000 club cash earns \$1,500 Global Grant DDF
  - \$1,500 Global Grant DDF earns \$1,200 from the World Fund
- Grants sponsored by clubs other than D5450 = **100% match.**

# Funding & DDF Matching

## Club & Grant Limits

- Max Global Grant DDF per club/year: **\$15,000**
- Max per grant:
  - \$10K (1 club)
  - \$15K (2 clubs)
  - \$20K (3 clubs)
  - \$25K (4 clubs)
  - \$30K (5 clubs)
  - \$35K (6 clubs)
  - \$40K (7 or more clubs)

NOTE: Matching applies **only to cash from District 5450 clubs**

# The Application Process

## Submit Early, Submit Complete

- Apply through **MyRotary.org**
- Use the template first, then copy/paste into the online system
- Required:
  - Community Needs Assessment
  - Area of Focus Policy Compliance
  - Detailed project plan + budget
  - Sustainability strategy
  - Confirmation of funding sources
- **Timing Matters:**
  - TRF requiring that grants for the 2025-26 budget year be submitted by February 1, 2026.
  - After DDF is confirmed, you have **120 days** to submit the full application or lose your spot in line

# Reporting & Stewardship

## Online Reports Due:

- First: within 12 months of receiving funds
- Then: every 12 months until completion
- Final Report: within 2 months of completion

## Reports must include:

- Activities & outcomes
- Full financial documentation
- Any changes to the original plan

# Publicizing your Grant

## Tell Your Story!

- Use **Rotary Showcase**
- Share in local media, club newsletters and online
- Highlight impact and community transformation

# Resources

For help:

- **A Guide to Global Grants** (Rotary.org)
- **Area of Focus** policy documents
- TRF Grants Officers
- District & Zone Grant Advisors & Cadre Members
- District 5450 website under Foundation/Grants
- Bob Kemp & District Int'l Service Committee

# Key Considerations for D5450 Grants

D5450 anticipates deploying approximately \$180,000 for GG DDF in 2025-26.

- Each Club is entitled to request up to \$15,000 in DDF this year. First come, first served policy. (Unchanged)
- Club cash will be matched 1.5X for projects originating within our District. (unchanged)
- Out of district projects will be provided a 100% match to Club cash. (unchanged)

# Key Considerations for D5450 Grants – cont.

- A maximum of \$40,000 per grant will be available, depending on the number of Clubs participating. (unchanged)
- DDF Commitment forms will still be required for Global Grants (unchanged)
- TRF is requesting that new grant applications for the 2025-26 year be submitted to TRF by February 1, 2026. (New for 2025-26 Year)



# Global Grants Competition



Zones 26 & 27  
Big West



**HAVE A BOLD IDEA  
THAT CAN CHANGE  
THE WORLD?**

<https://www.zoneinstitute.org/shark-tank/>



**QUESTIONS**

# Club Qualification Requirements

Mike Klingbiel

Rotary Club of Denver Southeast



# Club Qualification Requirements

- Club President-Elect Attended 2025 PETS or other approved training
- Grant Qualification Training (May 31, 2025)
- District Memorandum of Understanding signed
- All current and former Grant Reporting is current
- Club in good standing with the IRS

# Club in Good Standing with IRS

- Confirmation of Club's form 990 filing
- Annual requirement
- Submit to Operations Manager Bev Mendel,  
[office@rotary5450.org](mailto:office@rotary5450.org)

# Club Qualification Status

Rotary District 5450								
For Rotary Year 2025-2026								
Club Qualifications for District and Global Grants as of . . .	5/23/2025							
Club Name	Signed MOU for 7/1/25-6/30/26	Club 990 7/22 to 6/23	Club 990 7/23 to 6/24	District Training 2025-2026	Attended PETS Training	Delinquent Global Grant Reports	Delinquent District Grant Reports	Date Qualified
Boulder Valley		05/23/2024			Yes			
Breckenridge Mountain		03/20/2024			Yes			
Brighton		11/01/2023	08/14/2024		Yes			
Broomfield		03/15/2024			Yes			
Broomfield Crossing		10/16/2023			Yes			
Brush								
Carbon Valley		10/06/2023	10/21/2024		Yes			
Castle Pines		03/14/2024			Yes	GG-2022		
Castle Rock		05/24/2024			Yes			
Castle Rock High Noon		09/19/2023			Yes			
Centennial		08/01/2023	10/29/2024		Yes			
Clear Creek 2000		10/06/2023	08/05/2024		Yes			
Commerce City		01/02/2024	03/10/2025		Yes			
Conifer		03/14/2024	12/26/2024		Yes			

# Club Qualification Status

- Valid for one year in current Rotary year
- Club responsibility for grant funds
- Disclose conflicts of interest
- Cooperate with all audits
- Use grant funds properly
- Implement the District MOU

# Grant Stewardship

Stewardship is the responsible management and oversight of grant funds, including:

- Standard business practices
- Rotarian supervision
- Financial records and oversight
- Reporting of irregularities
- Timely submission of reports



# Grant Stewardship

Clubs must appoint a member to implement, manage and maintain club qualification:

- Ensure that all TRF grants adhere to proper stewardship and grant management practices
- Ensure that all individuals involved in a grant avoid any actual or perceived conflict of interest
- Submit signed District MOU to Operations Manager Bev Mendel, [office@rotary5450.org](mailto:office@rotary5450.org)



**QUESTIONS**