



Rotary 



Judigaun Drinking Water Project
Global Grant : GG2122171

Supported By

- Rotary Club of Dhulikhel, Nepal
- Rotary Club of Denver Southeast
- Rotary Club of Edwards
- Rotary club of Vail
- Rotary club of Fort Collins
- Rotary club of Denver Lodo
- Rotary club of Northglenn - Thornton
- Rotary club of Castle Rock High Noon
- Rotary club of Boulder
- Rotary club of Highlands Ranch (Littleton)
- Rotary International District 5470

Grants Training – Club Qualification

District 5450, June 15, 2024

The
Rotary
Foundation



Rotary 

AGENDA

Start Time	Elapsed Time	Topic	Presenter
8:30	10 min	Welcome and Comments	Tamie Fennell, District Governor-elect
8:40	15 min	Opening / Foundation	Mike Klingbiel, DRFC
9:05	20 min	District/Global Grants Storytelling	Mike Klingbiel, DRFC asking a few successful clubs to talk about their projects <ul style="list-style-type: none"> - Josh Knight – Project in Africa - Robert Mintz – Intl District Dental Grant - Conifer Mindfest – Peace Park
9:25	50 min	District Grants Training – Questions and Answers	Marty Waters, Grants Chair
10:15	15 min	Break	
10:30	50 min	Global Grants <ul style="list-style-type: none"> - Project Identification 	Bob Kemp, District International Services Chair (DISC)
11:20	15 min	Club Qualification	Mike Klingbiel, District Rotary Foundation Chair (DRFC) Dr. John Logan, District Stewardship Beverly Mendel, District Ops Manager
11:35	55 min	Questions / Discussion/Club collaboration time	Grants Team/Rotarians (Participants)

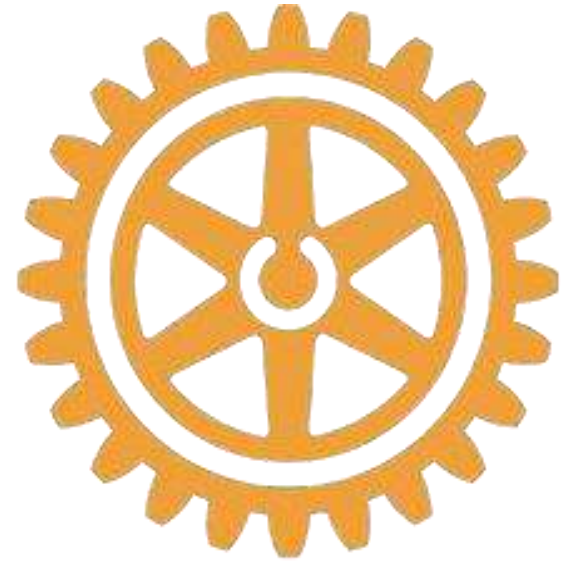
Greetings
from the
District Governor

DG Tammie
Fennell

2024-2025

Rotary

District 5450





Mike Klingbiel
Rotary District Foundation Chair

The Rotary 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.

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 benefits from a global network of Rotarians who invest their time and expertise ensuring 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 very 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

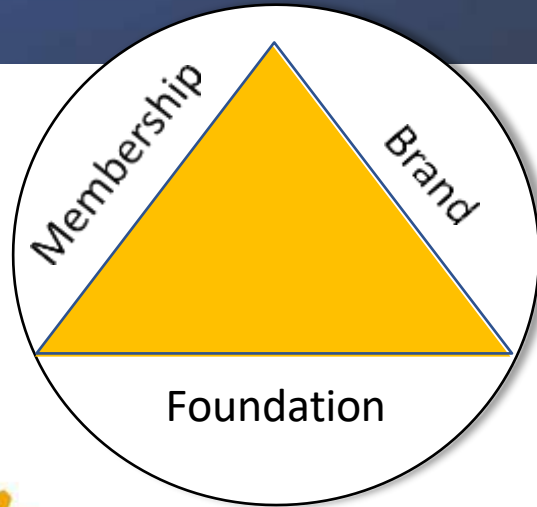
The Rotary Foundation helps Rotarians to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty.



The
Rotary
Foundation



THE MAGIC
OF ROTARY



CONNECTIONS

Rotary
District 5450



Rotary



Zones 26 & 27
Big West

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 (\$389K in 2021/2022). 33% of all Rotarians give to TRF. 284K for global grants, and \$105,000 for District Grants
Without supporting The Rotary Foundation from our Rotarians – we would not be here today! It is the FOUNDATION of The Rotary Foundation!
- For the 15th 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



District 5450 Grants



District Grants

District Designated Fund Grants (DDF)

1. Local Humanitarian Projects (service)
2. International Humanitarian Projects

Global Grants (GG)

1. International Humanitarian Projects Seven Areas of focus
2. Vocational Training Teams
3. Rotary Scholar Programs
 - a. Rotary Scholar (\$15,000)
 - b. Rotary peace Scholar (\$25,000)
 - c. Temple Buell Scholarship (\$30,000)

DISTRICT QUALIFICATION



- Complete the qualification process online annually
- Agree to implement the memorandum of understanding (MOU)
- Conduct grant management seminars for clubs



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.

Supporting The Rotary Foundation



YOUR GIFT CAN PROVIDE CLEAN WATER

Clean water, sanitation, and hygiene education are basic necessities for a healthy environment and a productive life. Your donation to our Foundation's Annual Fund provides these essentials in communities close to home and around the world.

GIVE TODAY: rotary.org/donate



The Rotary Foundation



TRIPLE YOUR IMPACT

For the next three years, the Gates Foundation will match every \$1 Rotary commits to polio eradication 2-to-1, up to \$50 million per year.

Your Donation	The Bill & Melinda Gates Foundation	Total Contribution to Fight Polio
\$25	+ \$50	= \$75

Which can purchase:

150 vests for volunteers, to help health workers stand out in a crowd and safely administer vaccines	75 vaccine carriers to keep the polio vaccine cool and effective	600 purple finger markers to mark children's pinkies to show they've been immunized
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HOW TO HELP

Learn. Share. Donate.



COUNTDOWN TO HISTORY

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!!!!





Marty Waters
District 5450 Grants Chair

WHY WE ARE HERE



DISTRICT TOPICS



- **Definition of District Grant**
- **Eligibility**
- **Applying**
- **Reviewing**
- **Payment/ Financial Controls**
- **Restrictions / Limitations**
- **Cooperating Organizations**
- **Benefitting Entity**
- **Reporting**
- **Important Changes**
- **Resources**

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

Activity Snapshots/ Trends 2019-2024



2023 – 2024

39 clubs requested DDF (65% of all clubs)

31% international / 69% local

46 projects / \$110K DDF (avg \$2,291 DDF per grant), \$10,208 avg for total grant

2022 – 2023

38 clubs requested DDF (64% of all clubs)

40% international / 60% local,

43 projects / \$117K DDF (avg \$2731 per grant), \$10,455 avg for total grant

2021 – 2022

38 clubs requested DDF (64%)

47% international / 53% local

35 projects / \$90K / Avg \$2,571 per grant

2020 – 2021

32 clubs requested DDF (55%)

22% international / 78% local

48 projects / \$112K / Avg \$2,333 per grant

2019 – 2020

36 clubs requested DDF (62%)

54% international / 46% local

41 projects / \$116K / Avg \$2,829 per grant

Activity Snapshots: Impact



Impact by Project Types

30% **Sustained Impact / Empowerment**, e.g. Career training, business enterprise development , WASH project, environmental mitigation

51% **Intermediate Impact** , e.g. housing access support, short term MH counseling, literacy, dental services

18% **Immediate Impact / “Good Will”** , e.g. holiday events, one-time gifts, clothes, living necessities, food security

Multiplier Effect



The District commits **\$110,000** in matching funds

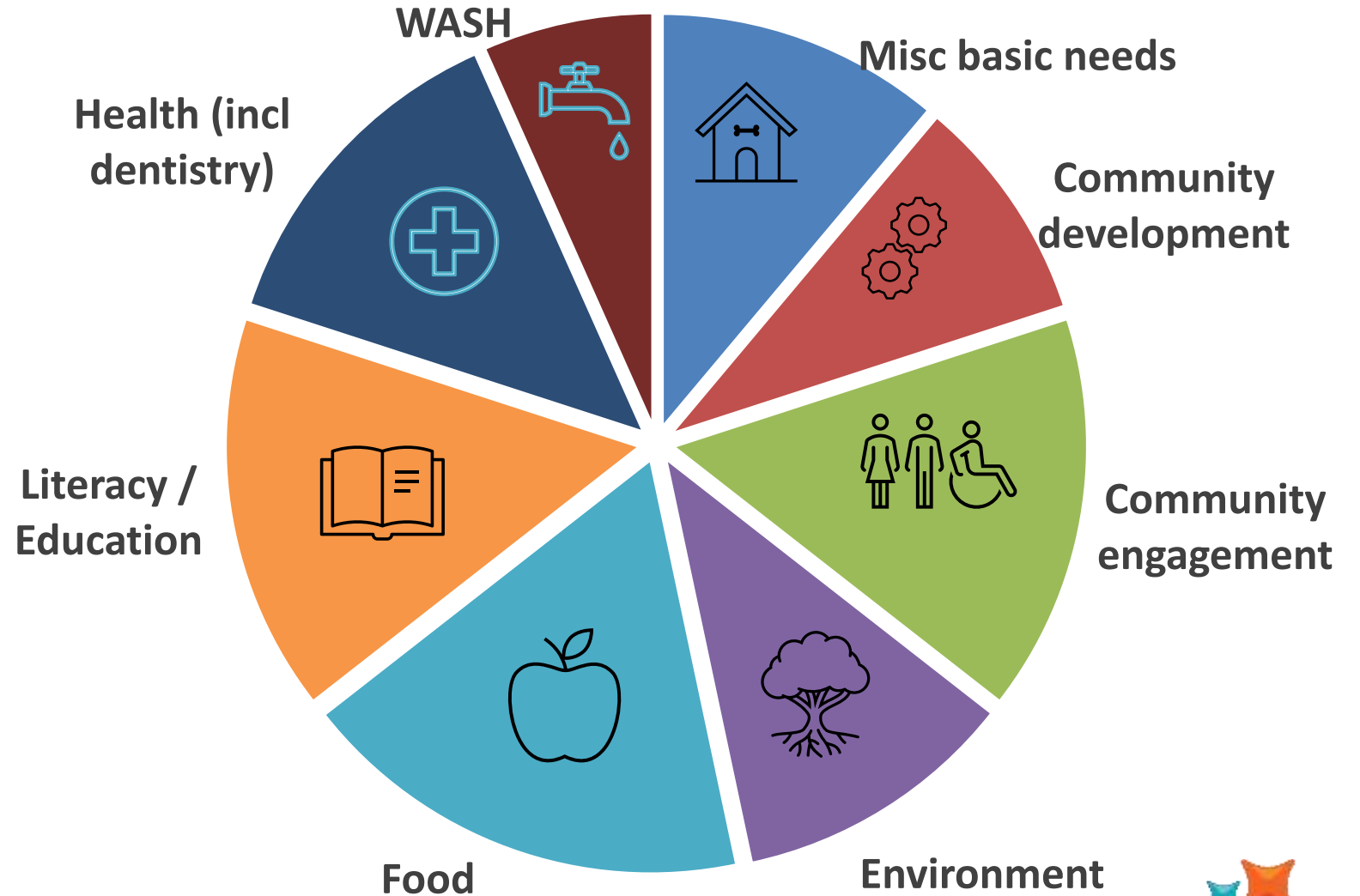
Clubs generate community projects totaling **\$490,000**

For every **\$1** allocated by District, an additional **\$3.45** is raised and spent on projects by clubs

Activity Snapshots: Impact



2023 – 2024 Project Types



ELIGIBILITY



1. **Club's qualification** to submit grant:
 - Club President **attends a Presidents-Elect Training Seminar (PETS) training** or an approved alternative.
 - Club President or Representative **attends District 5450 grant training** seminar
 - **MOU signed** by the president and president-elect
 - Proof of current filed **IRS Form 990**
 - **Reporting** on prior Rotary grants **up to date.**
2. **Satellite Groups** ineligible (as such are considered members of sponsoring club)

ELIGIBILITY



3. Proposed grant activities:
 - Meet a **need identified** by the beneficiary community
 - **Active participation** of District 5450 Rotarians:
 - Assessment of community needs
 - Development and management of a Project plan
 - Project implementation, hands on service
 - Financial stewardship of Grant funds
 - Promotion of the Project through Rotary signage and publicity

ELIGIBILITY



3. Proposed grant activities: (cont'd)
 - **Comply with laws** in US and in the area where the project is implemented
 - Be **reviewed and approved** by District Grants Committee **before** implementation (*grants may not be used to reimburse for activities completed or in process prior to approval*)
 - After grant approval, **subsequent changes** to plan require pre-approval by District
 - Be **completed within 12 months of approval** (unless waiver has been granted)

ELIGIBILITY



4. Grant-related **administrative expenses** must not exceed 10% of the total budget

5. Each Rotary year, the District will advise Clubs about **potential limits on DDF** for the year. (available on the grants page of the District Website).

ELIGIBILITY



6. DDF allocated on a **first-come/first-served** basis until exhausted.
7. District **right to prorate** some awards if the pool is exhausted before the end of the Rotary year
8. Grant sponsors must fully **account for the source and utilization** of any funding required to accomplish the Grant Project. The proposed budget must also be sufficient to accomplish the stated objectives

HOW TO APPLY



1. Complete and submit an online form with required attachments found at <https://rotary5450.org/sitepage/district-grants>
2. As indicated, include the following items:
 - A signed **Cash and DDF Confirmation form** from all participating clubs, including the sponsoring Club
 - A signed **letter/MOU* from the cooperating organization**, if applicable
 - A signed letter/MOU* from the international partner (Rotary Club or non-Rotary organization), if applicable
 - A completed **OFAC form** for all international grants

*(see resource page)

HOW TO APPLY



3. Submission of the grant application to the District Grants Subcommittee does **not guarantee approval** or availability of DDF funds.
4. If the grant application does **not pass** the review process and **move to the approval phase within 90 days of initial submission, the application will be canceled.** The Club will be required to make a fresh submission when it has all the required documentation and/or resolved pending issues.

HOW TO APPLY



5. If grant **implementation has not commenced within 90 days** of approval, the grant will be canceled, and the sponsors will be required to return the funds. The only exception is when a special waiver has been granted by the District Grants Committee.
6. **Funds should never be collected from beneficiaries** in exchange for receiving the grant or as part of the cash contribution toward a match.

WHAT HAPPENS AFTER YOU SUBMIT YOUR GRANT?



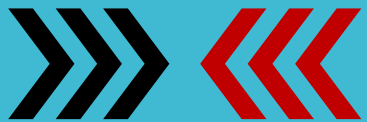
1. **Assigned to a reviewer.**
2. Reviewer will **contact you/your Club within 7 days** of the assignment **with feedback** from the review:
 - Might include questions or request for additional information.
 - Contact the District Grants Subcommittee Chair if you have not heard from the reviewer at the end of the specified time.
3. Application **proceeds to approval vote** once it is deemed complete, i.e.
 - All concerns arising from the initial review has been addressed or
 - No concerns arising from the initial review.

WHAT HAPPENS AFTERYOU SUBMIT YOUR GRANT?



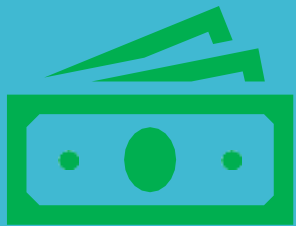
4. District String (District Governance group and Foundation Chair) Approval, **vote typically takes 1 – 7 days**
 - Any questions that arise at this stage will have to be addressed by the project champions and/or the Club.
5. The **club is notified** of the outcome of the vote and instructions on how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

CONFLICT OF INTEREST POLICY FOR PROGRAM PARTICIPANTS



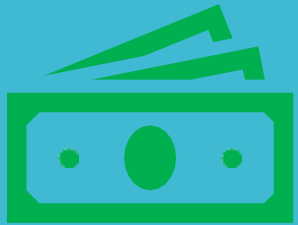
1. A **conflict of interest** occurs when someone is **in a position to make or influence a decision about a grant that could benefit them**, an immediate family member, a **business partner**, or an entity in which they, an immediate family member, or a business partner has a significant financial interest or in which any of them is a trustee, director, or officer.
2. All actual or potential conflicts of interest must be **disclosed in the grant application**. If you are not sure if there is a potential conflict, you should disclose it.
3. Rotarian(s) **cannot serve as contact or champion** for any grant project for which they may have a potential conflict of interest.

PAYMENTS/ FINANCIAL CONTROLS



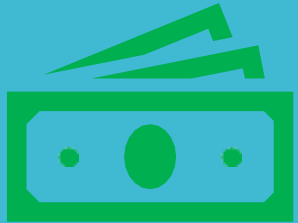
1. Grant funds will be **paid only** to the District 5450 Rotary **Club that was listed as the sponsor** in application.
2. Funds will **not be disbursed** by the District until the sponsor Club has completed and submitted the ***"Request by Clubs for District Grant Matching Funds"***, a copy of the grant award email and other required documentation to the District.
3. If grant payment/disbursement requirements are **not met within 90 days** of approval, the grant will be canceled.
4. The sponsoring club is responsible for collecting cash contributions committed by other clubs.

PAYMENTS/ FINANCIAL CONTROLS



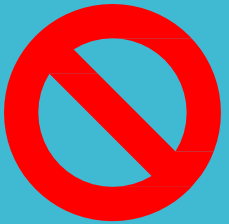
5. Grant funds must be held in a **Club-sponsored bank account**. This account cannot be the Club's Foundation account.
6. Once the grant is approved, the project **implementation can begin** (even before funding is received).
7. **Expenses incurred before** the Grant is approved are not eligible for reimbursement.

PAYMENTS/ FINANCIAL CONTROLS



8. Funds must be **under the control** of Rotarians:
- The **beneficiary** organization **may be given funds** for specific purchases if that is more efficient
 - **Partial payments** in advance are permitted with clear documentation of expenditures
 - **Receipts** for all expenditures are required.

RESTRICTIONS/ LIMITATIONS TO USE OF GRANT FUNDS



Grant funds **cannot be used** for:

1. **Continuous or excessive support** of any single beneficiary, entity, or community**

***Continuous contributions to community-based **organizations serving an ever-changing population may be permitted**, for example food banks, schools, refugee resettlement, etc.).*

*Rotary District grants are intended to serve diverse community needs and organizations for special projects. The grants are **not intended as an ongoing contribution to cover expected line-item expenses within a single organization's annual operating budget**.*

RESTRICTIONS/ LIMITATIONS TO USE OF GRANT FUNDS



Grant funds **cannot be used** for:

2. Vocational teams, Youth Exchange, RYLA, or YRYLA

3. Any **travel** for needs of project assessments and monitoring. *(Travel expenses of Rotarians and non-Rotarians who are essential to the completion of the Grant Project will be considered for reimbursement. The Grant application must identify each such participant and state their qualifications as essential participants).*

4. The **purchase or construction of buildings**. The **purchase of land** is also prohibited.

RESTRICTIONS/ LIMITATIONS TO USE OF GRANT FUNDS



Grant funds **cannot be used** for:

- 5. Fundraising** activities or **microcredit projects**.
- 6. Public relations initiatives** unless they are essential to carrying out the project.
- 7. Project signs** that cost > \$500.
- 8. The operating, administrative, or indirect program expenses** of another organization.
- 9. Unrestricted cash donations** to a beneficiary or cooperating organization.

COOPERATING ORGANIZATIONS



1. Reputable **non-Rotary organizations** or academic institutions that provide expertise, infrastructure, advocacy, training, education, or other administrative support for the grant. **The Rotary club is dependent upon the Cooperating Organization to implement aspects of the grant.**

2. The Cooperating Organization needs to **comply with all reporting and auditing activities** required by The Rotary Foundation and provide receipts and proof of purchases as required.

COOPERATING ORGANIZATIONS



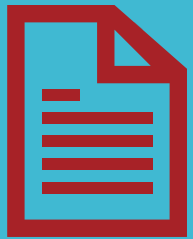
3. All **funding** provided to cooperating organizations needs to be **used for specific project expenses**. The sponsoring club needs to maintain an itemized report of these expenses.
4. The sponsoring club needs to provide a **signed letter / MOU** from the cooperating organization that specifically includes:
 - an agreement from the cooperating organization to **participate in any financial review** of activities connected with the grant by Rotary District 5450 or the Rotary Foundation
 - the **cooperating organization's responsibilities** and how it will interact with Rotarians to implement the grant project.

BENEFITING ENTITY



A benefiting entity (or beneficiary) is the **recipient of goods or services** and is not considered a cooperating organization.

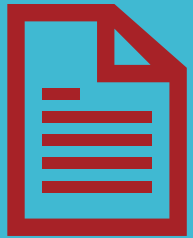
REPORTING REQUIREMENTS AND DOCUMENTATION



1. Reports documenting the implementation of the grant project (including how grant funds were used) must be submitted to the District Grants Committee at a minimum **within one year of the grant approval date**. For incomplete projects, an interim report is recommended within 6 months of project initiation.

If the **project remains incomplete** by June 30, 2024 (the end of the grant approval year 2023-2024) and was approved before January 1, 2024 (i.e. the grant has been active for six or more months), **submit an interim report** by June 30, 2024.

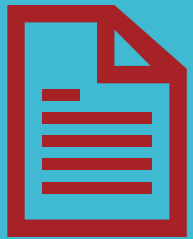
REPORTING REQUIREMENTS AND DOCUMENTATION



Submit a final report for all completed projects from the 23-24 grant year by June 30, 2024. For incomplete projects as of June 30, 2024, all projects must file a final report no later than June 2025 the following grant year to remain compliant with reporting.

2. Grant reports (progress or final) should be submitted to grants5450@gmail.com.
3. Grant sponsors need to keep copies of all **receipts and bank statements** related to grant-funded spending.

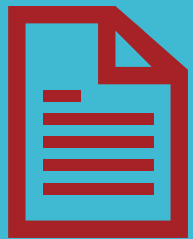
REPORTING REQUIREMENTS AND DOCUMENTATION



4. Progress reports should **include receipts** for expenses shown in the report. The final report **MUST** include any remaining receipts for expenses paid with Grant Funds and bank statements showing receipt and distribution of those funds

5. If any part of the grant funds was managed by any entity other than the District 5450 sponsor Club, the final report must include **bank statements showing all transactions** and a **letter from the organization** stating that all grant funds were spent on items listed in the grant. Receipts from the organization or a detailed summary of expenditures and dates are required.

REPORTING REQUIREMENTS AND DOCUMENTATION



6. All grant projects and activities funded by district grants need to be **completed within 12 months** of the grant approval date.

7. If **\$500 or more of grant funds remain** after the projects are completed, the District Grants Committee needs to approve their use for additional project-related expenses or any other appropriate humanitarian project.

If the remaining funds are **less than \$500**, the Club may spend this fund on any humanitarian-related activities after notifying the Grants Committee.

8. A club will be **ineligible** to apply for a new grant if it has an **overdue or delinquent grant report**.

CHANGES FOR 2024-2025



Each year the District reviews the availability and allocations of DDF. The **District** may implement changes based on demand and using DDF as efficiently as possible. Updates for 2024-2025:

District Grants:

- DDF allotment for District Grants of **\$110,000.**
- Applications must be submitted using the Online Submission Form

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District 5450 District Designated Funds (DDF) for District and Global Grants 2024- 2025



District Grants

DDF for District Grants is only available as a dollar-for-dollar match to a Club's cash contribution up to the limits below. District Grants do not receive additional matching funds from The Rotary Foundation (TRF.)

- The amount of DDF available for 2024-2025 for District Grants is **\$110,000**
- Awards are based on a **First Come First Serve** basis until the DDF pool is exhausted. The District may prorate awards in the month in which the DDF runs out.

District 5450 District Designated Funds (DDF) for District and Global Grants 2024- 2025



District Grants

- **Clubs Limits based on location:** Available funds are no longer restricted to a 50% local and 50% international project location designation.
- **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
- Cash will only be matched if it originates from a Club in District 5450.
- Contributions by one club to another club for the primary purpose of increasing DDF matching funds is prohibited

District 5450 Online Grant Application 2024- 2025



District 5450 Grant Applications 2022-2023

This application form is for the Rotary Year July 1, 2022 through June 30, 2023.

For ease of submission, companion documents supporting this application will be requested. These are found at the District Grant website (along with the District 5450 Terms and Conditions):

- project budget
- table of cash and DDF contributions by club
- cash and DDF confirmation forms for each contributing club
- cooperating organization MOU template (when indicated)

<https://portal.clubrunner.ca/50085/SitePage/grants>

Download these tools, complete as indicated, save to your personal files, and then attach at the appropriate location as requested within this application.

grants5450@gmail.com [Switch account](#)



The name and photo associated with your Google account will be recorded when you upload files and submit this form. Only the email you enter is part of your response.

* Required

Email *

Your email

District 5450



District 5450 Online Grant Application 2024-2025



Steps

- Go to District Grant Site for link to application
<https://portal.clubrunner.ca/50085/SitePage/grants>
- Open support documents that will be attached later (budget, cash and DDF contributors, cash and DDF confirmation forms, MOUs for cooperating organization if needed)
- Begin to fill out form
- Attach support documents as indicated
- Determine status of application is “Draft, Final, Revised Final”
- Your current response is sent back from **Google Forms** and you can edit as needed until finalized. **Save this email as it serves as your link for future edits.** After your first submission, you must inform the District Grant team that edits have been made and are ready for review.

District 5450 Online Grant Application 2024-2025



1. Go to District Grant Site and find link to google form application in online section (left side column, lower section)
2. Open related **support documents** found that will be attached later on
 - Budget Table and Contributing Clubs Cash and DDF Table
 - Cooperating Organization MOU
 - Cash & DDF Contribution District
 - Cooperating Organization MOU form
3. Complete requested information. If unable to complete all questions, close out and return later to edit.
4. Attach secondary **attachments** in appropriate locations
5. Determine **status of application** when ready to exit:
 - Draft – still in process, not ready for committee review
 - Final – all aspects complete, ready for committee review
 - Revised Final – previously submitted, corrections made, and new final form resubmitted
6. Your current completed response, regardless of completion status, is sent back to your listed email. You can edit as needed until finalized.
7. Once your submission is finalized, the review process will begin
8. You will be notified regarding the review status per standard operation procedures.

District 5450 Online Grant Application 2024-2025



Advantages of Online Form

- Efficient
- User friendly
- Additional decision support at your fingertips
- Continuous edit functionality
- Minimal “must complete” items
- Quicker review and processing for approval

DISTRICT 5450 GRANT REVIEW TEAM



Rotarian	Club	Email address	Title	Role
Martin Waters	Denver Mile High	mtwaters00@msn.com	Grants Sub-Committee Chair	Oversee District Grants and report to District leadership
Bonnie Thomas	Denver Southeast	bonniethomas@gmail.com	Member and Co-Chair (in Training)	District Grant Reviewer & Co-chair in training
Patricia Mourillon	eClub 5450	pat@psmconsultingservices.com	Member	District Grant Reviewer
John Wright	Castle Rock.	jwright310@comcast.net	Member	District Grant Reviewer
Ralph Ogden	Denver Tech Center	irishcorky@aol.com	Member	District Grant Reviewer
Karen Loeb	Denver South East	kcloeb@gmail.com	Member	District Grant Reviewer
Dan Hall	Denver Mile High	djhall@ncsc.org	Member	District Grant Reviewer

RESOURCES: GRANT OVERVIEW



Grants Overview

Grants

[Grants Overview](#)

Related Pages

[Club Qualification](#)

[District Grants](#)

[Global Grants](#)

[Sue Fox Memorial Grant](#)

[District Grants 2017-2018
Applications 01.2018](#)

[District Grants Awarded 2016-
17](#)

[2015-16 District Grants Matrix](#)

[District 5450 Grants since 2009](#)

Links

[2020-21 DDF Announcement](#)

[2020-21 DDF Maximums](#)

District 5450 Rotary Grants Overview

[Click Here to View the 2020-2021 Grants Club Qualification Report](#)

[Click Here to View Approved 2019-2020 District Grant Applications](#) *(link available soon)*

Club Qualification for Sponsoring Rotary Grants

A District 5450 Club that sponsors a Global Grant or District Grant must be "qualified" before the grant application can be approved. Club qualification is renewed annually and requires that:

1. The Club President must have attended a PETS training or an approved alternative.
2. The Club President or Representative must attend District 5450 grant training seminar for the grant year.
3. An MOU signed by the president and president-elect for the grant year be submitted to District.
4. Proof of current filed IRS Form 990 be submitted to District.
5. All reporting on prior Rotary grants is up to date.

Go to the Club Qualification page for more information and instructions.

District Designated Funds

50% of the contributions to the Rotary International Annual Fund are returned 3 years later to the District as DDF (District Designated Funds). DDF is divided into two separate pools:

- District Grant DDF which is returned to the District and used as the match for District Grant awards, which are administered by the District.
- Global Grant DDF, which is held by The Rotary Foundation (TRF), and is used as a match for Global Grants, which are reviewed and approved by TRF.

District Grants

Complete Guidance for District Grants effective July 1, 2020 can be found in the District 5450 District Grants Terms and Conditions, which can be found using the link on the left side of this page.

District Grants are humanitarian projects, either local or international, that meet TRF and District guidelines. A

RESOURCES: APPLICATION FORM



Related Page

Grants » District Grants

- District Grants
- Subpages
 - District Grants Process
- Related Pages
 - Club Administration
 - Online Grant Submission Link**
 - Online Grant Application Instructions
 - District Grant Online Application 2023-2024
 - Budget Table, Contributing Clubs Cash & DDF Table
 - Sample Online Application
 - Sample Budget Clubs Cash & DDF
- Paper Submission Link
 - District Grant Application 2023-

District Grants Process 2023-2024

District grants are intended to support club-sponsored humanitarian projects that align with The Rotary Foundation and District 5450 missions. These grants are hands-on Rotarian projects that address immediate needs in the benefiting communities, both local and international.

The District offers two options for submission with additional detail found in the respective side menu sections. Based on administrative efficiencies, online submissions will receive a faster processing and review turnaround than the paper submissions. **1) Online Submission:** complete Google form, attach related forms as instructed (form automatically routes to grant review team with copy sent to applicant); Online submissions streamline the application process and document maintenance for all parties involved. **2) Paper Submission:** complete a Word application form and associated documents, attach documents to email, submit to grant review team, grants5450@gmail.com.

Complete Guidance for District Grants effective July 1, 2023, can be found in the District 5450 District Grants Terms and Conditions, which can be found using the link on the left side of this page

District Grants are humanitarian projects, either local or international, that meet TRF and District guidelines. A District Grant:

- Meets a need identified by an underserved community.
- Is a Rotary project, with signage and publicity; not the project of another organization.
- Has all Grant funds under the control of Rotarians.
- **Does not incur expenses or begin until the Grant application has been approved.**
- Has hands-on involvement by the sponsoring Rotarians at the project site or, in the case of an international project, hands-on involvement by a partner Rotary Club in the project area.
- Is designed to be completed within one year of approval.
- Meets the additional requirements included in the District 5450 District Grant Terms and Conditions referenced above.

District Grant Funding

- Club funds will be matched \$1 to \$1 with DDF up to the limits below. District Grants do not receive



ROTARY DISTRICT 5450 DISTRICT GRANT TERMS AND CONDITIONS



ROTARY DISTRICT 5450 DISTRICT GRANTS TERMS AND CONDITIONS

This document governs all District 5450 "District" grants applications. Rotary District 5450 may modify these terms and conditions at any time to reflect policy changes and to add clarity. You can find the District Grants Application form at <https://bit.ly/DistrictGrantApplicationForm>.

WHAT IS A DISTRICT GRANT?

District Grants are awarded to support humanitarian projects sponsored by Rotary Clubs in District 5450; these projects are short-term (one year) and may be either local or international. District Grants are normally intended for smaller projects that would be ineligible to be funded as a Global Grant due to their size or characteristics. District Designated Funds (DDF) for these projects come from The Rotary Foundation (TRF) based on contributions to TRF by District 5450 members three years earlier. The District is responsible for administering the grants, meeting TRF limitations, and setting additional District requirements as needed.

ELIGIBILITY

- Any Club within District 5450 can apply provided the Club meets the qualification requirements outlined below:
 - Club President must have attended a PETS training or an approved alternative.
 - Club President or Representative must attend District 5450 grant training seminar for the grant year.
 - MOU signed by the president and president-elect for the grant year submitted to District.
 - Proof of current filed IRS Form 990 submitted to District.
 - All reporting on prior Rotary grants must be up to date.
- Satellite Groups are ineligible for District Grants as they and their membership are members of their sponsoring Rotary Club.
- Proposed grant activities must
 - Meet a need identified by the beneficiary community
 - Include active participation of District 5450 Clubs and Rotarians. Such participation may include the following:
 - Assessment of community needs
 - Development of a Project plan

Terms and Conditions for District 5450's District Grants (April 2023)

- Project Implementation
- Financial stewardship of Grant funds
- Promotion of the Project through Rotary signage and publicity

- 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.
 - Be reviewed and approved by the District Grants Committee before their implementation. Grants may not be used to reimburse clubs for activities and expenses already completed or in progress. Planning for grant activities prior to approval is encouraged, but expenses may not be incurred. After grant approval, any changes to the original project plan must be pre-approved by District.
 - Be completed within 12-months of approval, except in cases where a waiver has been granted by the District Grants Committee.
- Grant-related administrative expenses must not exceed 10 percent of the total budget
 - Each Rotary year, the District will advise Clubs about potential limits on DDF for the year. This information and any subsequent changes will be available on the grants page of the District Website.
 - Grant Applications will be allocated DDF on a first-come/first-served basis until all DDF reserved for District Grants are exhausted.
 - The District retains the right to prorate some awards if the pool is exhausted before the end of the Rotary year.
 - Grant sponsors must fully account for the source and utilization of any funding required to accomplish the Grant Project. The proposed District Grant budget must also be sufficient to accomplish the stated objectives of the Grant.

HOW TO APPLY

- Complete and submit a signed copy of the District Grants Application form to the District Grants Committee via email, grants5450@gmail.com
- In addition to the application form, you must also submit the following items:
 - A signed Cash and DDF Confirmation form from all participating clubs, including the sponsoring Club
 - A signed letter/MOU from the cooperating organization, if applicable
 - A signed letter/MOU from the international partner (Rotary Club or non-Rotary organization), if applicable
- Submission of the grant application to the District Grants Subcommittee does not guarantee approval or availability of DDF funds.

Terms and Conditions for District 5450's District Grants (April 2023)

2

RESOURCES



Tools found at District 5450 Rotary Grants Overview

<https://portal.clubrunner.ca/50085/sitepage/grants>

- Club List
- Club Qualification Status
- Track District Grant Applications (list of submissions)
- Track DDF Awarded to Club including amount by club
- District Grants Process Club Qualification Requirements
- District Grant Application Form (online and paper versions), Report Form, and Cash & DDF Confirmation Form
- Club MOU
- OFAC Review list
- Cooperating Organization MOU sample and template

RESOURCES: CLUB QUALIFICATION



Club Qualification 2020-2021 ☆ Saved to Drive

File Edit View Insert Format Data Tools Add-ons Help

Working...

100% View only

	A	B	C	D	E	F	G	H	I
1					Rotary District 5450				
2								Please see bottom of matrix	
3	Club Qualifications for District and Global Grants as of ...			For Rotary Year 2020-2021					
4		06/12/2020							
5	Club Name	Signed MOU for 7/1/19-6/30/20	Club 990 7/17 to 6/18	Club 990 7/18 to 6/19	District Training 2020-2021	District Training	Delinquent Global Grant Reports	Delinquent District Grant Reports	Date Qualified
6	Arvada		7/8/2019	3/16/2020	*	1/12/2019			
7	Arvada Sunrise	4/8/2020	1/29/2019	11/19/2019	*	05/06/2019			* 04/08/2020
8	Aurora			01/17/2020	*	1/12/2019			
9	Aurora Fitzsimons		9/20/2018	02/21/2020	1/11/2020	1/12/2019			
10	Aurora Gateway	11/21/2019	7/15/19	11/26/2019	1/11/2020	1/12/2019			12/03/2019
11	Boulder	07/02/2019	6/28/2019	03/16/2020	1/11/2020	1/12/2019			3/20/2020
12	Boulder Flatirons	10/21/2019	6/20/2019	10/29/2019	1/11/2020	1/12/2019			10/21/2019
13	Boulder Valley	05/24/2019	1/31/19	3/27/2020	1/11/2020	1/12/2019			05/24/2019
14	Breckenridge Mountain	07/05/2019		03/27/2020	*	08/15/2019			* 03/27/2020
15	Brighton	03/02/2020	12/19/2018	11/13/2019	01/11/2020				03/25/2020
16	Broomfield		07/22/2019	11/13/2019	01/11/2020				
17	Broomfield Crossing		11/7/2018	11/13/2019	*				
18	Brush		07/18/2018		1/11/2020	1/12/2019			
19	Carbon Valley	10/04/2019	9/17/2018	11/13/2019	*	1/12/2019			10/04/2019
20	Castle Pines	06/24/2019	6/24/2019	11/1/2019	*	1/12/2019			06/24/2019
21	Castle Rock	04/05/2020	7/18/2019	ex 04/04/2020	*	1/12/2019			* 04/05/2020
22	Castle Rock High Noon	07/25/2019	1/25/2019	11/13/2019	1/11/2020	1/12/2019			07/25/2019
23	Centennial	7/5/2019	7/18/2019	3/30/2020	*	1/12/2019			7/18/2019
24	Clear Creek 2000	07/05/2019		7/29/2019	*	1/12/2019			07/29/2019
25	Commerce City	06/28/2019	7/11/2019	1/23/2020	1/11/2020	1/12/2019			07/11/2019
26	Conifer	03/31/2020	8/24/2019	03/31/2020	01/11/2020				03/31/2020
27	Denver	08/12/2019	5/24/19	ex4/1/2020	*	1/12/2019			* 04/01/2020
28	Denver Cherry Creek	07/16/2019	11/21/2018	11/19/2019	*	1/12/2019		DG 19-010	
29	Denver LoDo				*	1/12/2019			
30	Denver Mile High	12/19/2019	6/20/2019	12/20/2019	1/11/2020	1/12/2019			12/20/2019
31	Denver Southeast	09/27/2019	2/13/2019	3/27/2020	1/11/2020	1/12/2019			09/27/2019

RESOURCES: TRACK DDF AWARDED TO CLUB



2019-2020_District-Grant_Approved-DDF_by_Club (Responses)

	A	B	C	D	E	F	G	H	I	J	K	L
		Club	DOF Approved	Grant Number	Grant Title	Grant Sponsor	Grant Location/Country	Grant Type		DOF Balance	\$479,683.00	
2	7/5/2019 14:57:12	Highlands Ranch	\$3,000.00	DG20-003	Seasonal Family Influenza Vaccine	Highlands Ranch	Aurora, Colorado	Local (US-Based)				
3	7/12/2019 11:35:14	Castle Pines	\$2,775.00	DG20-004	Youth Education and Safety in Schools	Castle Pines	Highlands Ranch, Colorado	Local (US-Based)		DOF (District Grants)	\$89,861.00	
4	7/16/2019 3:32:57	Commerce City	\$2,500.00	DG20-006	Mental Health Initiative	Commerce City	Commerce City, Colorado	Local (US-Based)		DOF (COVID-19 Grants)	\$40,050.00	
5	7/29/2019 17:16:14	Denver Cherry Creek	\$3,000.00	DG20-008	Dental Mission to the Jungle Honduras	Denver Cherry Creek	LaCeiba/Honduras	International (Non US-Based)				
6	7/29/2019 17:18:00	Breckenridge Mountain	\$1,000.00	DG20-008	Dental Mission to the Jungle Honduras	Denver Cherry Creek	LaCeiba/Honduras	International (Non US-Based)				
7	7/29/2019 17:19:39	Denver Mile High	\$500.00	DG20-008	Dental Mission to the Jungle Honduras	Denver Cherry Creek	LaCeiba/Honduras	International (Non US-Based)				
8	7/29/2019 17:20:36	Denver Southeast Rotary	\$500.00	DG20-008	Dental Mission to the Jungle Honduras	Denver Cherry Creek	LaCeiba/Honduras	International (Non US-Based)				
9	8/23/2019 1:38:51	Centennial	\$3,000.00	DG20-009	Rotary Playground at Dar El Aviad	Centennial	Lebanon	International (Non US-Based)				
10	9/30/2019 0:30:22	Parker	\$350.00	DG20-012	Community Breakfast with Santa	Parker	Parker, Colorado	Local (US-Based)				
11	9/30/2019 0:33:37	Boulder	\$3,000.00	DG20-007	E-Waste Recycling in the West Bank	Boulder	West Bank, Palestine	International (Non US-Based)				
12	9/30/2019 0:53:07	Mead	\$2,000.00	DG20-001	Enhancing Filipino Organic Farmers Se	Mead	Benguet Province, Philippines	International (Non US-Based)				
13	9/30/2019 0:54:01	Platteville	\$500.00	DG20-001	Enhancing Filipino Organic Farmers Se	Mead	Benguet Province, Philippines	International (Non US-Based)				
14	9/30/2019 0:54:38	Longmont Twin Peaks	\$500.00	DG20-001	Enhancing Filipino Organic Farmers Se	Mead	Benguet Province, Philippines	International (Non US-Based)				
15	10/13/2019 17:50:14	Westminster 7.10	\$3,000.00	DG20-013	Los Gomez Water Supply	Westminster 7.10	Nicaragua	International (Non US-Based)				
16	10/13/2019 18:00:29	Evergreen Rotary	\$1,000.00	DG20-013	Los Gomez Water Supply	Westminster 7.10	Nicaragua	International (Non US-Based)				
17	10/15/2019 0:19:40	Carbon Valley	\$864.00	DG20-017	Dictionaries for 3rd Graders	Carbon Valley	Frederick, Firestone, Dacon	Local (US-Based)				
18	10/15/2019 1:12:13	Commerce City	\$3,000.00	DG20-011	Mongolia Support	Commerce City	Ulaanbaatar/Mongolia	International (Non US-Based)				
19	11/20/2019 12:00:17	Littleton	\$2,000.00	DG20-014	Helping Mothers Survive	Littleton	Iquitos, Peru	International (Non US-Based)				
20	11/20/2019 12:03:19	Golden	\$1,500.00	DG20-014	Helping Mothers Survive	Littleton	Iquitos, Peru	International (Non US-Based)				
21	11/20/2019 12:04:35	Evergreen Rotary	\$1,000.00	DG20-014	Helping Mothers Survive	Littleton	Iquitos, Peru	International (Non US-Based)				
22	11/20/2019 12:12:28	Erie	\$2,612.00	DG20-016	Dictionaries for 3rd Graders in Participa	Erie	Erie, CO	Local (US-Based)				
23	11/25/2019 0:45:38	Granby	\$3,000.00	DG20-018	Bridging Gaps	Granby	Grand County, CO	Local (US-Based)				
24	12/11/2019 12:06:59	Boulder Flatirons	\$2,250.00	DG20-010	Water for life	Boulder Flatirons	Peru	International (Non US-Based)				
25	12/11/2019 13:55:12	Centennial-Satellite	\$3,000.00	DG20-021	Rotary Books with Jacket	Centennial-Satellite	Colorado	Local (US-Based)				
26	12/12/2019 7:37:06	Summit County	\$1,000.00	DG20-005	ECO Stoves	Summit County	Honduras	International (Non US-Based)				
27	12/12/2019 8:13:33	Boulder Valley	\$3,000.00	DG20-019	Juvenile Justice Volunteer Support	Boulder Valley	Boulder, CO	Local (US-Based)				
28	1/6/2020 7:46:02	Wheat Ridge	\$1,000.00	DG20-020	Coats for Cold Kids	Wheat Ridge	Wheat Ridge, Colorado	Local (US-Based)				
29	1/10/2020 20:21:35	Summit County	\$1,000.00	DG20-024	Mending Faces	Summit County	Philippines	International (Non US-Based)				
30	1/10/2020 20:22:23	Broomfield	\$3,000.00	DG20-024	Mending Faces	Summit County	Philippines	International (Non US-Based)				
31	1/10/2020 20:32:41	Denver Mile High	\$1,500.00	DG20-023	Hydrogeological survey	Denver Mile High	Zimbabwe	International (Non US-Based)				
32	1/10/2020 20:37:51	Aurora Gateway	\$1,500.00	DG20-022	Little Free Food Pantry	Aurora Gateway	Aurora, Colorado	Local (US-Based)				
33	2/5/2020 11:27:16	Aurora Gateway	\$1,000.00	DG20-014	Helping Mothers Survive	Littleton	Iquitos, Peru	International (Non US-Based)				

RESOURCES: OFAC REVIEW LIST



U.S. DEPARTMENT OF THE TREASURY

ABOUT TREASURY SECRETARY MNUCHIN POLICY ISSUES DATA SERVICES NEWS

For small businesses seeking direct relief from COVID-19, [CLICK HERE](#) to learn more about Paycheck Protection Loans.

Resource Center

Home » Resource Center » Financial Sanctions » Programs

Sanctions Programs and Country Information

OFAC administers a number of different sanctions programs. The sanctions can be either comprehensive or selective, using the blocking of assets and trade restrictions to accomplish foreign policy and national security goals.

Where is OFAC's country list?

Active Sanctions Programs:	Program Last Updated:
Balkans-Related Sanctions	02/03/2017
Belarus Sanctions	10/22/2019
Blocking Property of Certain Persons Associated with the International Criminal Court Sanctions	06/11/2020
Burundi Sanctions	06/02/2016
Countering America's Adversaries Through Sanctions Act of 2017 (CAATSA)	05/20/2020
Central African Republic Sanctions	12/13/2017
Counter Narcotics Trafficking Sanctions	04/22/2020
Counter Terrorism Sanctions	06/17/2020
Cuba Sanctions	04/20/2020



Bob Kemp
District International Services Chair

The **ROTARY ACTION PLAN**



PROGRESS REPORT / TAKE ACTION NOW

The Rotary
Grants
Program as
part of the
Strategic Plan.

Increasing our Impact:

“Using our resources for programs that have the potential for the greatest impact.”

Enhance Participant Engagement:

“Making participants central to what we do which means we’re being proactive, asking people how they want to engage with us.”

Rotary Grant Programs

- *District Grants*: smaller scale, short term.
- *Global Grants*: larger, international activities. **Minimum \$30,000 budget, maximum TRF award is \$400,000.**
- *Grants of Scale*: expand proven programs. (\$2MM annually)
- *Community Health Challenge*: new program, \$10MM Rotary budget.
- *Disaster Response*: Independent donation pool.
- *Polio Plus Program*: \$50 MM annual donation pool.

Global Grant Funding for 2024 - 2025

- Annual Fund donations from the 2021-22 Rotary Year. (new funds)
- Earnings from the Endowment Fund.
- **Carry forward of unspent funds from prior years. (Subject to new TRF 5 year rule.)**

District 5450 Global Grant policy for the 2024-25 Rotary Year.

- District 5450 will make available up to \$250,000 in DDF for Global Grants.
- For Grants originating in the clubs of our District the match for cash will be increased to 150%.
- For Grants originating outside our District the match for the cash contributions of our clubs will be increased to 100%.
- The maximum amount of DDF that may be requested for any single Grant is increased to \$40,000.

District 5450 Global Grant policy for the 2024-25 Rotary Year.

- The maximum amount of Global Grant DDF available to any individual club is \$15,000 for the Rotary Year.
- The maximum DDF available to a grant is determined by the number of D5450 Clubs that participate.
 - \$10,000 for one club.
 - \$15,000 for two clubs
 - \$20,000 for three clubs
 - \$25,000 for four clubs
 - \$30,000 for five clubs
 - \$35,000 for six clubs
 - \$40,000 for seven or more clubs.

DDF Funding Examples using 2024-2025 Grant Policy

- **\$1 (Club cash) + \$1.50 DDF match + \$1.20 (80% TRF match) *Total \$3.70 in Global Grant funding.***
- **\$26,660 (club cash from 7 or more clubs) + \$39,990 in DDF match + 31,992 (80% TRF match)**
- ***Total \$98,642 in Global Grant funding.***

2023 - 2024 D5450 Global Grant Results.

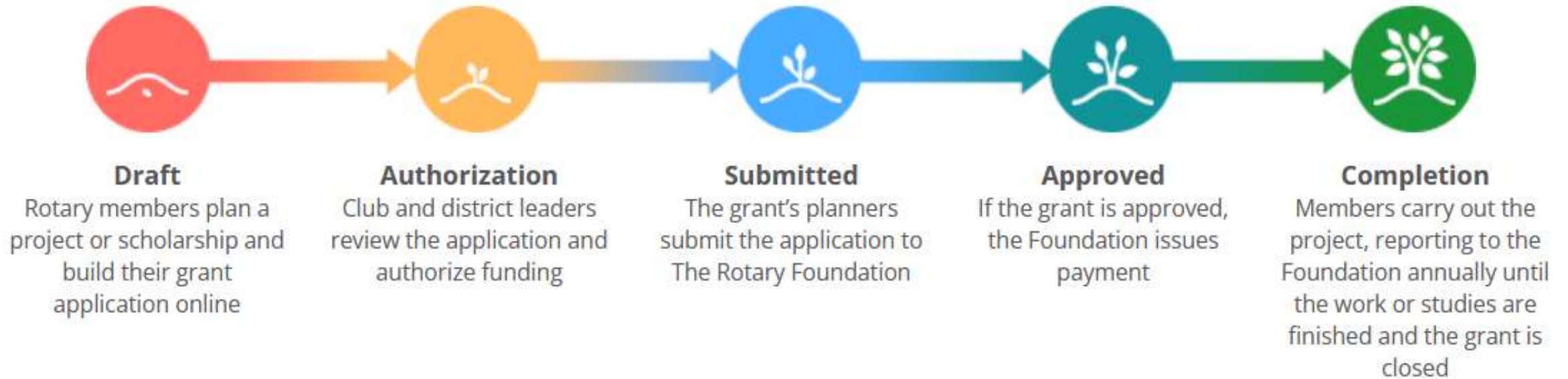
- District 5450 has had a total of 9 Global Grants approved for funding by TRF since July 1, 2023. 1 additional grant has been formally submitted to TRF.
- ***Total DDF expended plus "tagged" is \$80,584.***
- Two grants are pending authorizations by other districts. Four additional grants are in draft form. These six projects have a total DDF exposure of \$45,000.

New Global Grant Projects.

Is a Global Grant right for your club?

- Project Identification (where, by whom, to do what?)
- Needs Assessment for the beneficiary community.
- Development of Grant Application
- Funding
- Grant Approvals and Submission
- TRF Review and Authorization
- Project Execution
- Reporting and Grant Closure

The lifecycle of a Rotary grant



Global Grants must be in one or more of the seven Areas of Focus



Peace and Conflict Prevention/Resolution



Disease Prevention and Treatment



Water and Sanitation



Maternal and Child Health



Basic Education and Literacy



Community Economic Development



Environment

Important Resources



To find Guidelines for each Area of Focus:

- Go to Rotary.org
- Log into “My Rotary”
- Move cursor to “Take Action”
- Scroll down to “Apply for Grants” and then over and up to “Global Grants”
- Click on “Global Grants”
- Scroll to very bottom of the screen to find the Guidelines for each Area of Focus

Global Grants require partnerships!



- Partnership of 2 (or more) Clubs.
- May also involve a cooperating partner organization.
- In-Country Host Club – located in the country where the project will take place.
- International Sponsor Club – located in a country other than where the grant will take place. International Sponsor must provide at least 15% of the project budget.
- Both sponsor Clubs must be qualified.
- Know your partners. Understand their organizational strengths and weakness.

Global Grant Impact



Global Grants create lasting change:

- Meet community needs
- Develop community ownership of the project
- Increase capacity in assets and knowledge
- Continue beyond Rotary funding
- Engage Rotarians in both host and international countries.

Important Resources



Important Resources:

- A Guide to Global Grants: *overview of the entire process*
- Guidelines for Global Grant Funding: *detailed description of requirements*
- Areas of Focus Policy Statements: *description of eligible projects in each Area*
- *District Grant Advisor*
- *Cadre members in Area of Focus*
- *Regional RI Reviewer*
- *Rotary Action Groups*

Community Needs Assessment



- Start with the community
 - What do they want?
 - Does it qualify for a Global Grant?
 - What will they support and maintain?
- Objective Community input
- Host Rotarians actively involved
- Local initiatives considered
- Include all stakeholders, including local government
- Community Needs Assessment is a requirement of TRF and needs to be completed prior to Grant submission. They cannot be funded by the Global Grant.

Funding for Global Grants



- Global Grants are funded through:
 - Cash from Rotary Clubs
 - Cash from other sources
 - District Designated Funds (DDF)
 - World Fund match from TRF: 80% for DDF only
- Minimum project size is \$30,000
- Start fundraising as soon as possible
- Consider using [Matchinggrants.org](https://www.matchinggrants.org)

DDF – First
Come, First
Served.

Also:

Use it or lose it!

Sponsor submits DDF request with signed cash and DDF forms.

- District approves request, on condition that application is submitted to RI within 120 days.
 - Submission to R.I. requires that all District approvals are in place. **D5450 will not approve a Grant that has not already been approved by the in-country host District.**
 - Requests considered in order of receipt
 - District approval of DDF from current year
 - If application not submitted to R.I. (**with all required authorizations in place**) within 120 days, DDF request goes to the back of the queue

Plan the Project



- Needs
- Funding
- Project Development
- Budget
- Implementation
- Outcomes
- Documentation

Project Development



- Create a project plan that follows RI guidelines
- Local Rotarians should be actively involved; they
 - Know the culture and the language
 - Understand how the government works
 - They were part of the Community Needs Assessment
- Identify potential conflicts of interest

Conflicts of Interest



- Exists when a Rotarian benefits financially or personally from a grant
- Benefit can be direct or indirect
- A conflict can be real or apparent
- A potential or perceived conflict must be disclosed

Creating a Budget



- Host Rotary Club & community get bids
- Realistic
- Competitive bidding
- Balance cost and quality
- Will need Proformas for large expenditures

Cooperating Organization



- Not a vendor
- Disclose any Conflicts of Interest
- Responsibilities
 - Necessary to implementation
 - Works side by side with Rotary sponsor
 - Understands “Rotary” Project
- The Host Rotary should be involved in the selection

Global Grant Permissible Expenses



- 10% contingency
- 10% for project manager
- 10% for measurement/outcomes
- \$1,000 for project signage

Setting Measurable Goals



- Make the measurement meaningful:
 - Outputs
 - Outcomes, if possible
- Sustainable
- Quantitative (numeric)
- Qualitative can be powerful: stories
- Identify baseline data source

Financial Controls and Recordkeeping



- Separate Club Bank account for each grant
- Funds must be under Club control
- Formal payment process is followed
- Detailed ledger, receipts and bank statement
- Financial reviews by both Host and International Club
- 5-year documentation: accessible to Club members

Applying for Global Grants



- RI application Online—start early
- RI assigns a grant number with little info
- Use Template to share with Committee
 - Then copy and paste online
- Generally, no specific deadline
 - Earlier in Rotary year is better to solicit funds from other Clubs
- RI Grant Advisor is invaluable

Global Grant Application



- Include community identified needs
- Detailed plan and budget
- Describe activities and
- Outcome measurements
- Disclose how Rotarians will be involved
- Funding sources after Rotary grant ends

Global Grant Submission



- Application is complete—ready to submit
- All funding committed and District has confirmed DDF
- Within 120 days of District DDF confirm
- Will need authorizations from each District
- Lock the grant; track approvals

Global Grant RI Review



Once application is submitted:

- RI Regional Grant Advisor will communicate with sponsors on points of clarity or required changes
- Meeting Area of Focus and sustainability are key RI review items
- Determine how Clubs will send their cash commitments

Global Grant RI Review



- Cash payments made to TRF:
 - 5% administrative charge
 - Donor will get Paul Harris credit
 - Consult Host Rotarian for preference/RI requirement
- Cash payments direct to Grant Account:
 - No administrative charge
 - No Paul Harris credit
 - Likely wire fees/ currency charges
- **Discuss payment mode early with supporting Clubs**

Global Grant Reports Online



- Approval
 - Notify all supporting Clubs
 - Track payments from other Clubs
 - Assist Host Club, if necessary
- DDF is automatically taken from the account of supporting Districts. No action is needed by sponsoring Clubs.
- Grant activity can begin before funds are received

Global Grant Reports Online



- Progress reports
 - First due within 12 months of payment
 - Every 12 months until completed: *Prudent to accelerate first report*
- Detail activities, expenses, variances at report date
- Bank statements required with report
- Final report due 2 months after completion

Global Grants Publicity



- Tell your story
 - Rotary Showcase
 - Local news, Club website
- Resources
 - Rotary5450.org under Grants
- Rotary website: www.rotary.org
 - In My Rotary
 - Under The Rotary Foundation, or
 - Learning and Reference



Mike Klingbiel
Club Qualification Requirements

Qualification Requirements

- Club President Elects attended PETS (Winter/Spring 2024)
- Grant management seminar (June 15, 2024)
- Club memorandum of understanding
- All Current and Former Grant Reporting 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 Bev Mendel, D5450 Operations Manager,
office@rotary5450.org

Club Qualification Status

Club Name	Signed MOU for 7/1/22-6/30/23	Club 990 7/20 to 6/21	Club 990 7/21 to 6/22	District Training 2022-2023	Attended PETS Training	Delinquent Global Grant Reports	Delinquent District Grant Reports	Delinquent District Covid Grant Reports	Date Qualified
Arvada		08/25/2021	11/14/2022						
Arvada Sunrise	09/21/2022	01/06/2022	11/16/2022	06/23/2022	2022				9/21/2022
Aurora	10/05/2022	04/20/2022	03/10/2023		2022				03/10/2023
Aurora Fitzsimons	08/22/2022	12/10/2021	11/11/2022	6/23/2022	2022				8/22/2022
Aurora Gateway	09/21/2022	11/02/2021	11/14/2022		2022				
Boulder	08/22/2022	02/03/2022		06/23/2022	2022		DG21-031		
Boulder Flatirons	07/19/2022	10/14/2021	01/04/2023	06/23/2022	2022				2/7/2023
Boulder Valley	10/05/2022	09/28/2022	Ext 1/3/2023	06/23/2022	2022				10/5/2022
Breckenridge Mountain	08/25/2022	12/08/2021	10/19/2022	06/23/2022	2022				8/25/2022
Brighton			02/06/2023	06/23/2022	2022				
Broomfield	03/16/2023	12/06/2021	12/30/2022	02/24/2023	2022				3/16/2023
Broomfield Crossing		10/06/2021	08/04/2022	06/23/2022	2022				
Brush					2022				
Carbon Valley	08/22/2022	01/19/2022	03/06/2023	06/23/2022	2022				8/22/2022
Castle Pines	07/19/2022	09/07/2021	12/28/2022	06/23/2022	2022				7/19/2022
Castle Rock		02/22/2022	Ext 4/24/2023	06/23/2022	2022				
Castle Rock High Noon	09/21/2022	08/04/2021	08/04/2022	06/23/2022	2022				9/21/2022
Centennial	09/21/2022	09/09/2022	12/30/2022	06/23/2022	2022				9/21/2022
Clear Creek 2000	08/22/2022	07/26/2021	07/12/2022	06/23/2022	2022				8/22/2022
Commerce City	02/27/2023	04/07/2022	02/16/2023	06/23/2022	2022				02/27/2023
Conifer		11/24/2021	10/07/2022	06/23/2022	2022				
Denver		01/09/2023	05/17/2023	06/23/2022	2022				
Denver Cherry Creek	08/22/2022	09/09/2021	09/23/2022	06/23/2022	2022				8/22/2022
Denver LoDo				11/16/2022	2022				
Denver Metro South	10/17/2022		09/27/2022	06/23/2022	2022				10/17/2022

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Terms of Qualification

- 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 club MOU

Stewardship MOU

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

MOU Requirements

Club 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 MOU documentation via email to Bev Mendel, District 5450 Operations Manager at office@rotary5450.org.