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District Grants 2023-2024

District 9705 Guidelines

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**What the Foundation Funds:**

The Rotary Foundation funds District and Global Grants. They distribute District Grants as lumps sums to Districts that pay for scholarships, travel, and projects that all align with the Foundation’s mission. That mission is to help Rotarians contribute to world understanding, goodwill and peace by improving people’s health, supporting education and alleviating poverty.

**You are also encouraged to read the Terms and Conditions for Rotary Foundation District Grants and Global Grants (November 2019) from the RI Website**

# District Grants processes – eligibility, applications and funding

## Eligibility for grant funding

## All Foundation Grant activities need to:

* Relate to the Foundations mission.
* Include active participation from Rotarians.
* Exclude the Rotary Foundation or Rotary International from any liability beyond the amount funded by the Grant.
* Comply with the laws of both the United States and the area where the grant will be carried out and cause no harm. **The Rotary Foundation is a legal entity based in the United States and therefore all activities funded by the Foundation are governed by their laws.**
* Be reviewed and approved by the Foundation before being implemented. You can’t use grants to reimburse clubs or districts for activities and expenses that are already in progress or completed prior to approval. **You cannot start or complete a project in the 22/23 Rotary year and apply for a District Grant in the 23/24 Rotary year to cover the costs of the project.**
* Demonstrate sensitivity to the traditions and culture of the area where a project will be carried out.
* Include signs on or near projects that identify the role of the grant sponsors and the Rotary Foundation.

In addition to the eligibility criteria listed above, District Grants:

* Support local and international projects, scholarships, vocational training teams and related travel.
* May fund scholar and vocational training team orientation and grant management seminars.
* May pay for travel to and participation in Rotary project fairs to help clubs and districts find partners.
* Fund projects and activities both in countries where Rotary has clubs and in areas where we do not, and in geographical areas where permitted by law and in accordance with Foundation policies.

## Applications – project description – project completion.

Applicants are required to submit an application (form available on line)to the District Grants subcommittee, normally by **31 May.** The District Governor, with the support of the District Board, may apply for a District Grant on behalf of the District.

The project proposal should be no more than 2 pages, and it must provide:

* + Description of the project: what is it, who will benefit, where will the project take place?
  + Detailed budget: identify expenditure items of the project.
  + Rotarian and non-Rotarian involvement: significant involvement of Rotarians is expected.
  + District Grant funding sought: how much is sought from the District?
  + Contact person’s details: the person who will submit final reports and receipts to the District.
  + Confirm that the project will be completed within the Rotary year unless exceptional circumstances are approved by the Grants Committee prior to the end of the year.

If the grant is for scholarship or vocational training team projects, the applicant must provide details as per the applicable grant terms and conditions.

The project proposal must be forwarded to the District Grants Committee via (i.e. cc) the club President.

Applicants must submit a final report with copies of the receipts and bank statements to the District Grants Chair on completion of the sponsored part of the project and preferably by 31 May but at the latest by 30 June of the Grant year. Reimbursement of the Grant will occur following lodgment.

## Funding approval, payments, Club contributions

The District Foundation Grants Committee will approve the grants: The committee comprises District Rotary Foundation Committee Chair, the Grants Committee Chair, Grants Committee Member and the District Governor.

The grant funds will be reimbursed to the Applicants at the completion of the project and submission of the final report.

Funding will not be approved where a Club has an outstanding report due for an existing Foundation project.

In general, clubs are expected to meet some of the total cost of the proposed project.

In the event of insufficient funds being available to support all applications, the following criteria, in no particular order, will be considered when selecting successful applications:

* The number and nature of previous District Grants awarded to the Club
* Whether the project meets one of the Foundation’s Seven Areas of Focus
* The Club’s support of the Foundation and its programs
* Sustainability of the project.

# D9705 District Grants – Timeline for 2023-24

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Task** | **Action by whom** | **Comments** |
| **April**  **2023** | Online Grants Seminar.  District Grant project proposals sought from Clubs and the District. | Grants Chair advertises for Clubs and the District to submit project proposals. | District Grant Chair to assist Clubs where possible. |
| **31 May**  **2023** | The District submits completed MOUs for the new Rotary year. | District MOU is completed by District Governor Elect and District Rotary Foundation Chair and is submitted to The Rotary Foundation grant coordinator on line. | Receive Confirmation from DRFC that the District MOU has been submitted |
| **31 May**  **2023** | Due date to submit project proposal (applications) to the District. | Applicants (Club and/or District) submit project proposal to Grants Committee Chair. | Grants Committee will assess eligibility of the projects against TRF District Grant terms and conditions and any other relevant grant terms and conditions. |
| **July 2023** | Submit District Grant Spending Plan to TRF, online. | District Foundation Chair and Grants Chair submit a District Grant Spending Plan to TRF on line and seek approval & funding for the projects.  The application for funding can identify:   1. Summary of proposed District Grant projects with funding needed for each project. 2. Total District Grant amount sought. 3. Allocation of up to 20% of DDF for unexpected project costs (e.g. disaster recovery) and 3% for administrative costs. | -­‐ Only one application allowed per year  -­‐ Online process managed by Foundation Chair.  -­‐ Unexpected cost can be used for disaster recovery.  -­‐ Unused DDF return to Global Grants, DDF bucket for 2024/25 |
| **August – Sept 2023** | District receives approval and funding of the District Grant spending plan. | TRF provides a grant based on the Spending Plan submitted.  Grants Committee informs the successful Clubs to commence the project. The Clubs receive payment after the completion of the project and submission of the final Report | -­‐ **Clubs must spend the money on the project and are then reimbursed following completion of the project**. |
| **31 May**  **2024** | Final Project Report requested | Applicants (Clubs / District) submit project completion report (except for scholarships and disaster recovery) to the District, including the receipts and copies of Bank Statements.  Unspent funds return to TRF. | -­‐ District keeps copies of the receipts & completed project reports. **Clubs keep the original receipts and a copy of the report.** |
| **30 June**  **2024** | Submit final Report to TRF (i.e. disbursement of funds) | District Foundation Chair and Grants Chair submit final report (on disbursement of funds) to TRF using the same format as per the District Grants Spending Plan, noting any changes to DG Spending Plan. | -­‐ The final report within 12months of receipt of funds from the Foundation. This report must be lodged with the Foundation before the Grant Funds for the next year are paid to the District! |
| **30 June**  **2024** | Project Completion. | Applicants complete all projects within the Rotary year | All District Grant projects must be completed within the Rotary year. |



# INVITATION – District Grant applications 2023-24 – D9705

To Clubs and the District Representatives,

You are invited to submit an application (project proposal) for a District Grant for 2023-2024 Rotary year. Clubs and the District can apply for a broad range of projects, including: -­‐ *Humanitarian service projects, including disaster recovery efforts,*

-­‐ *Scholarships (primary, secondary, vocational, tertiary) in any location, area of study, including peace type scholarship,* *Vocational training team (VTT) visits to and from D9705*

**Due date or applications: 31 May 2023.**

**Amount available:** up to $5,000 per project (humanitarian service projects & school scholarships) can be requested but larger amounts may be available for more complex projects and scholarships. Amounts allocated depend on total funds available!

# How to Apply:

**Step 1:** Read Grants Terms and Conditions for District Grants (in particular, see under Eligibility, Restrictions) see summary below or visit at: -

[**https://my.rotary.org/en/take-action/apply-grants/district-grants**](https://my.rotary.org/en/take-action/apply-grants/district-grants)

Alternatively, see below for extracted sections. If you are applying for scholarships and Vocational Training Team (VTT) projects, please read applicable Terms and Condition in addition to the above.

**Step 2: Project Proposal & checklist** – in no more than 2 pages, the application must provide information on:

1. Description of the project – what is it, who will benefit, where will the project take place?
2. Detailed budget – what would you buy with the grant monies (i.e. separate to spending Club/other funds)?
3. Rotarian involvement e.g. what would they do? Rotarian’s involvement is expected.
4. Grant funding sought - how much is sought? (Clubs/external organisations are expected to contribute financially to the project)
5. Contact person’s details – Who will submit the final reports & receipts to the District.
6. Confirm that the project will be completed in the Rotary year unless exceptional circumstances are approved by the Grants Committee (or for humanitarian service project).
7. Applications for tertiary scholarships, vocational training team projects - provide details as per the applicable TRF grant terms and conditions and confirm that the date of project completion.
8. **Please Note:** Project proposals from Clubs which currently have District Grant funds would not be considered for new funds, unless the final report for that project is submitted by 30 May 2023.

**Step 3: Submitting process:** Please email the application (project proposal) to PDG Phil Armstrong – philaarmstrong@gmail.com. *The project proposal must be emailed via the Club President (i.e. cc Club President).*

Note: Clubs are required to submit final report following completion of your project. Photos would be appreciated.

Please contact Phil Armstrong, Chair Grants Committee – 23/24 or John McKenzie District Rotary Foundation Chair (DRFC) if you want more information or help with your application.

## Terms and Conditions for Rotary Foundation District Grants (selected headings only)

Below is an extract of applicable sections for District Grants from Terms and Conditions for District Grants and Global Grants. If the information below does not help you to determine eligibility of your project, please read other relevant Terms and Conditions (e.g. for VTT and Scholarships) and the full Terms & Conditions for District Grants at

[**https://my.rotary.org/en/take-action/apply-grants/global-grants**](https://my.rotary.org/en/take-action/apply-grants/global-grants)

1. **Eligibility Guidelines (Terms** *and Conditions for District Grants and Global Grants, heading II, pg1)*

Listed in the District Guidelines

1. **Restrictions** *(****most important*** *-­‐ Terms Conditions for District Grants& Global Grants, heading III, page 3 - 4)*
2. Grants cannot be used to unfairly discriminate against any group; promote a particular political or religious viewpoint; support purely religious functions; support activities that involve abortion or that are undertaken solely for sex determination; fund the purchase of weapons or ammunition; or serve as a new contribution to the Foundation or another Rotary Foundation grant.
3. In addition, grants **cannot fund**:
   1. Continuous or excessive support of any one beneficiary, entity, or community.
   2. Establishment of a foundation, permanent trust, or long-term interest-bearing account. Grant funds can be used to establish a microcredit fund if the sponsors comply with the requirements of Section X of the Terms and Conditions.
   3. Purchase of land or buildings.
   4. Fundraising activities.
   5. Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities
   6. Public relations initiatives unless they are essential to carrying out the project.
   7. Project signs that cost more than US$1000
   8. The operating, administrative, or indirect program expenses of another organization with the exception of expenses allowed within the project management allocation for global grants.
   9. Unrestricted cash donations to a beneficiary or cooperating organization
   10. Activities for which the cost has already been incurred.
   11. Transportation of vaccines over national borders without prior approval of appropriate government and regulatory authorities in the originating and recipient countries.
   12. Travel to National Immunization Days (NIDs)
   13. Immunizations that consist solely of the polio vaccine
   14. Study at a university that hosts a Rotary Peace Center in the same or similar academic program as Rotary Peace Fellows

#### Other relevant headings:

* 1. Projects involving Cooperating Organisations VII (pg9‐10) All funding provided to cooperating organisations needs to be used for specific project expenses. The sponsor district needs to maintain an itemized report of these expenses.
  2. Projects involving international travel e.g. VTT, please read applicable sections on Travel Policies (pg7‐8)

# District Grant Report Instructions

## Preparing and submitting a District Grant report

Step 1: Collect and review Individual Project Report forms for each project. Please note that all sections of the Individual Project Report form must be completed. For club projects, the certifying signature must be provided by a member of the club.

Step 2: If necessary, follow up with project contacts to complete missing report information or to address eligibility issues. Please refer to the District Grant Eligibility Guidelines.

Step 3: Complete the District Grant Summary Report, pages 7 and 8 below.

Step 4: Submit District Grant Summary Report with accompanying bank statement(s), receipts/invoices, and Individual Project Reports to the Grants Chair. (Note: Individual Project Reports must be accompanied by a District Grant Summary Report. Do not send Individual Project Reports separately.)

Please note the following:

* + The District requires that a Club submit Grant reports that includes all eligible expenditures totaling the amount of the allocated Grant before payment is made on another Grant.
  + A final report is required within two months of the full expenditure of grant funds. However, early submission of reports will allow districts to avoid delays on the approval of future District grants.
  + Reports must be submitted using the form below. *Please type the report*. Retain a copy of the entire report for your records.
  + Clubs should retain original receipts for all grant-funded expenditures and provide copies to the district. The district must maintain copies of all receipts related to grant-funded expenditures in accordance with local laws and for a period of at least five years following closure of the grant. Do not send receipts to TRF unless requested by staff.
  + Please attach action photos showing the beneficiaries or showing active Rotarian involvement.

****

## DISTRICT 9705 DISTRICT GRANT FINAL REPORT

**FOR THE GRANT/ROTARY YEAR (***1STJuly - 30th June)*

|  |  |
| --- | --- |
| **ROTARY GRANT YEAR** |  |
| **PROJECT TITLE/NAME** |  |
| **ROTARY CLUB NAME** |  |
| **Club District Grant Project**  **Co-Ordinator** *(Primary Contact)* |  |
| **Contact Numbers** *(Home/Mobile)* |  |
| **Email Address** |  |

**FINAL REPORT NOTES**

* Submitting the District Grant Final Report is the last step in the completion of your District Grant. The report provides a wrap-up of the project and ensures that all required Rotary Foundation procedures were followed. NB. Projects may be audited by the Rotary Foundation.
* **The Final Report must be submitted by 31 May in the year of the Grant. If this creates a problem then please contact the District Grants Chair prior to 31 May.**
* Acceptance by the District Grants Committee of your Final Report is required before any Grant funds can be reimbursed. Reimbursement to the Club will occur as soon as practicable after receipt of the Final Report.
* The report should be typewritten, all sections completed. Please print and have your Club President Sign, then scan the form and all your supporting documentation into your computer and send electronically to the email address of the Grants Chair shown at the end of this document. Supporting documentation to include copies of relevant invoices/receipts as well as the Club’s Bank Statements showing payments of the relevant invoices/receipts. Clubs are reminded that they must retain the originals of this report for at least five years.

1. **PROJECT DESCRIPTION.** *Briefly describe the project, what was done, when and where did project activities take place, and who were the beneficiaries?*

|  |
| --- |
|  |

1. **PARTICIPATING ROTARIANS.** *How many? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
2. **TASKS PERFORMED BY ROTARIANS** *Please give at least two examples.*

|  |
| --- |
|  |

1. **WHAT IS THE EXPECTED LONG -TERM COMMUNITY BENEFIT/IMPACT OF THE PROJECT?**

|  |
| --- |
|  |

1. **IF A COOPERATING ORGANIZATION WAS INVOLVED, WHAT WAS ITS ROLE?**

|  |
| --- |
|  |

1. **INCOME AND EXPENDITURE**

|  |  |
| --- | --- |
| **INCOME SOURCE** | **AMOUNT $** |
| District Grant Funds |  |
| Cash From your club |  |
| Cash from other sources *(pls specify)* |  |
|  |  |
|  |  |
|  |  |
| **TOTAL PROJECT INCOME $** |  |

|  |  |
| --- | --- |
| **EXPENSE ITEMS** | **AMOUNT$** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **TOTAL PROJECT EXPENDITURE $** |  |

**PROJECT REPORT CERTIFICATION**

By signing this report, I certify that to the best of my knowledge these funds were spent only on eligible items in accordance with The Rotary Foundation guidelines, and that all of the information contained herein is true and accurate. Copies of Receipts for all Grant Funded expenditures are included along with copies of the Club’s Bank Statements showing payments of expenses.

|  |  |
| --- | --- |
| **Club President Name** |  |
| **President’s Signature** |  |
| **Date** |  |
| **Contact Numbers (Home/Mobile)** |  |
| **Email Address** |  |

**Final Grant Report must be submitted by 31 May**

(During the Grant/Rotary Year 1st July – 30 June)

Email to District Grants Chair Phil Armstrong at: [philaarmstrong@gmail.com](mailto:philaarmstrong@gmail.com)

Ph: 0418 259 963

**Additional Information** *(if required)*

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DISTRICT 9705 DISTRICT GRANT APPLICATION FORM **ROTARY/GRANT - YEAR 2023-24**

|  |  |
| --- | --- |
| **PROJECT TITLE/NAME**  *(Max 7 words*) |  |
| **ROTARY CLUB NAME** |  |

**PURPOSE OF DISTRICT GRANTS**

* District grants fund short-term (max 1-year) local or international projects and activities that support the Foundations Mission of ‘*Doing Good in the World*’.
* Clubs are expected to contribute financially to the project in addition to the District Grant Funds. Grant funding is not restricted but usually in the range of $500 to $5,000.

Clubs can use district Grants to fund a variety of activities, including:

* **Humanitarian projects**, including service travel and disaster recovery efforts
* **Community**
* **Vocational Training** of any team size or time span
* **Travel costs** to and participating in Rotary projects fairs to find project partners
* **Scholarships** for any level, length of time, location or area of study

Grants should respond to an identifiable community need and align with one or more “Area of Focus”.

|  |  |
| --- | --- |
| **Areas of Focus** | **Select (x) Area(s) applicable** |
| * Peace and conflict prevention/resolution |  |
| * Disease prevention and treatment |  |
| * Water and Sanitation |  |
| * Maternal and child health |  |
| * Basic education and literacy |  |
| * Economic and community development |  |
| * Environment |  |

|  |
| --- |
| **DESCRIBE THE PROJECT/PROJECT OBJECTIVES** *(Briefly describe WHAT the Project will achieve)* |
| **OUTLINE THE BENEFITS OF THE PROJECT** *(Briefly describe WHO benefits)* |

**PROJECT BUDGET, AGREEMENT, AUTHORIZATION AND CONTACT DETAILS**

|  |  |  |
| --- | --- | --- |
| **Project Funding** *(Budget)* | | **Amount $AUD** |
| 1. District Grant *(funds requested)* | |  |
| 1. Club Funds *(committed)* | |  |
| 1. Other Funds *(pls specify)* | |  |
|  | |  |
|  | |  |
|  | |  |
|  | |  |
| **Total Project Costs $** | |  |
| ***Note****: Projects to commence after 1 July and be completed by 30 June of the Grant/Rotary Year* | | |
| **Proposed Project Start date:** |  | |
| **Estimated Completion date:** |  | |
| **Additional Remarks** *(if necessary add further information below or on a separate sheet)* | | |

**CLUB AGREEMENT**

This Agreement is between the club and the district and acknowledges that the club will undertake measures to ensure the correct implementation of grant activities and proper management of Foundation Grant funds.

|  |  |
| --- | --- |
| **Club District Grant Project  Co-ordinator Name** *(Primary Contact)* |  |
| **Contact Numbers (Home/Mobile)** |  |
| **Email Address** |  |

**Club President Club President Elect**

|  |  |
| --- | --- |
| **Name** | **Name** |
| **Signature** | **Signature** |

***Note: The report should be typewritten, all sections completed. Print application, have your Club President and President Elect sign it, then scan the form and all your supporting documentation into your computer and send electronically to the email address of the Grants Coordinator shown below.***

**Applications** need to be received by **31 May 2022**

Send your Application to the District Grants Chair Phil Armstrong at: [philaarmstrong@gmail.com](mailto:philaarmstrong@gmail.com)

Ph: 0418 259 963

**Additional Information:**

Successful clubs will be advised in writing by the Grants Chair and a copy of the Final Report Form will be attached so Clubs understand what is required at the end of the project before any grant funds can be reimbursed to the Club.

District Rotary Foundation Chair: John McKenzie – [johnmckenzie9700@gmail.com](mailto:johnmckenzie9700@gmail.com)