

GRANT MANAGEMENT SEMINAR

Session 1 – Wednesday, February 26	7:30 – 8:30 pm
Session 2 – Sunday, March 23	6:00 – 7:00 pm
Session 3 – Monday, April 14	7:00 – 8:00 pm

Rotary Year 2025-2026
CNYRotary / District 7180



FOUNDATION COMMITTEE 2025-2026

DISTRICT GRANTS SUBCOMMITTEE MEMBERS:

David Hennel, PDG, Glenville Rotary, dg2014@hennel.net

James High, PDG, New Hartford Rotary, carlyhi@aol.com

Dana Jerrard, PDG, CNY Rotary Secretary, Utica Rotary, jerrarddana@gmail.com

Bonnie Levy, ESQ, DeWitt Rotary, BonnieRotary7150@gmail.com

Dr. Catrina Ruling, Norwich Rotary, catrinapt1@hotmail.com

ADDL FOUNDATION COMMITTEE MEMBERS:

Don Reese, PDG, CNY Rotary DRFC Chair, Utica Rotary, 2024-2027, dgreese7150@gmail.com

Bob Balk, CNY Rotary President Elect, 2025-2026, Moravia Rotary, bob.balk@outlook.com

Pamela Baker Gratton, CNY Rotary President Designate, 2026-2027, Auburn Rotary, pbgratton@gmail.com

Elise Hereth, VVS Community Rotary, eliserotary7150@gmail.com

Lizzy Martin, CNY Rotary President, 2024-2025, Baldwinsville Rotary, rotarylizzy@gmail.com

Nancy Potter, Ithaca Rotary, potternancy20@gmail.com

Lana Rouff, PDG, Binghamton Noon Rotary, lanarouff@gmail.com

Randy Wilson, PDG, EPNC, Sauquoit Rotary, randyw7150@gmail.com

Zoe van der Meulen, PDG, AARFC, Unadilla Rotary, zoe@unadillarotary.org

APPROACH

- *Continue with 2024-25 approach / process +*
- Continue to fund club projects / grants
- Support projects big and small
- Support clubs big and small
- Manage process within available funding
- Further simplify application process & administration
- Think BIG !! – Fund and publicize great projects!
- *Need even more publicity / PR on great work!!*
- Administer with Four Way Test in mind...

2024 – 25 RECAP

\$65,846

*The Rotary Foundation (TRF) funding for District Grants
based on SHARE contributions 3 years prior*

2024 – 25 RECAP

- *All 41 clubs that submitted timely applications received grant funding!!!*
- *\$145.5 K in projects received*
- *\$71K requested for District Grant Fund matching*
- *Based on TRF available funding - \$65,846 awarded / allocated*
 - *\$2,000 max District Grant awarded (\$2,500)*
 - *\$8,500 max Regional Grant awarded (\$10,000)*
- *Only 2 final reports received yet for 2024-25 Grants – please submit when projects completed (committee tasked to review / reimburse by end of month for all final reports received by first of month)*
- ***FINAL REPORTS for 2024-25 grants due no later than July 31, 2025***

CHANGES FOR 2025-26 APPLICATIONS

- *Continue with overall 2024-25 approach / process – offer 3 ‘types’ of grants*
 - *District Grants – Scholarships*
 - *District Grants*
 - *Regional Grants*
- Regional Grants – require minimum \$500 contribution by sponsoring (applying) CNY club
- Regional Grants – additional points (scoring) will be awarded for clubs that have NOT recently been awarded Regional Grant
- Continued emphasis for clubs to be current with IRS filing requirements (likely mandatory to be current for 2026-27 grant applications)
- Budgeting – only require 3 quotes when Expense > \$1000
- ***Emphasis on avoiding ‘Conflicts of Interest’ – disclose and address when appropriate***
- ***Reminder – can not START project until you receive APPROVAL – all expenses can only be incurred after receiving APPROVAL notification and prior to June 30, 2026***

GRANTS MODEL

Clubs get to consider / choose from available grant models / approaches:

- \$30,000 or more – GLOBAL GRANT
- \$500 to \$2,500 – DISTRICT GRANT
- \$1,500 to \$10,000 – REGIONAL (DISTRICT) GRANT

REGIONAL GRANT

- **Our type of District Grant for larger scale, more impactful grants !**
- Clubs can apply for match of **\$10,000 max** (\$1,500 min)
- Similar to Global Grants – funded based on matching funds
- **Sponsoring club has \$500 minimum contribution**
- **Matching funds of \$2 per \$1 raised**
- Applications meet ALL requirements of District Grant + Scored ...

REGIONAL GRANT - SCORING

- Applications meet ALL requirements of District Grant
- **Subject to additional Review / Scoring (i.e. Rubric) for**
 - Project Description / Impact (0-10 pts)
 - Project Plan / Timeline (0-10 pts)
 - Budget (0-10 pts)
 - Publicity / Communications Plan (0-10 pts)
 - Needs Assessment / Community Assessment (0-5 pts)
 - Partner Organizations / Community involvement (0-5 pts)
 - Foundation Support (0-5 pts)
 - Sustainability (0-5 pts)
 - Rotarian involvement (0-5 pts)
 - **Have NOT** recently received Regional Grant (0-5 pts)
- Applications specify requested amount / minimum amount

DISTRICT GRANT FUNDING

- **Matching funds** available from / offered by District
 - District Grants / Scholarships (\$0.50 match on \$1 raised)
 - District Grants (\$1 match on \$1 raised)
 - Regional Grants (Up to \$2 match on \$1 raised)
- **Allocation % for available District Grant funds**
 - District Grants (traditional) 2/3 of available funds
 - Regional Grants (scored) 1/3 of available funds
- Clubs **CHOOSE** which type of 'District Grant' when applying
- Applications complete / received by June 1 deadline
- ALL **District Grants** (traditional) meeting required criteria **will** receive a portion of available funds (*subject to 'max amount' based on requests and available funds*)
- *Planned expenses > \$1000 need 3 quotes as part of budget*

CNY MEMORANDUM OF UNDERSTANDING (MOU)



THE ROTARY FOUNDATION 2024-2025 CNY Rotary
Memorandum of Understanding
This is a QUALIFYING DOCUMENT

Reports on Use of Grant Funds:

The requesting club must adhere to all TRF reporting requirements. Grant reporting is a key aspect of grant management and stewardship, as it informs TRF of the grant's progress and how funds are spent. All reports are to be submitted to the CNY Foundation Committee at grants@cnyrotary.org

Document Retention:

The Club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification of TRF grants. Clubs agree to make any documentation related to their grant(s) available to the CNY Foundation Committee upon request. Documentation must be maintained for a minimum of five years, or longer if required by local law.

Maintained Documentation (including, but not limited to):

- ☐ Club qualification documentation, including a copy of this signed club MOU
- ☐ Documented plans and procedures including: procedures for storing and retaining information, documentation and archives, and a succession plan for bank account signatories
- ☐ Bank account information, including copies of past statements for Global Grants only.
- ☐ Information related to grant funds, including receipts and invoices for all purchases
- ☐ Club records must be accessible and available to Rotarians in the sponsor club, and at the request of the CNY Foundation Committee

CNY Rotary Reporting Misuse of Grant Funds:

If any Rotarian with interest in the project suspects misuse of grants funds, he/she must report allegations in writing to the District Stewardship Chair or, if the alleged misuse involves the Stewardship Chair, to the Foundation Chair and District Governor within twenty-four (24) hours of its knowledge of suspected misuse.

The Stewardship Chair or District Governor as identified above will investigate, report its findings in writing, and attempt to resolve any and all allegations of misuse.

Conflicts of Interest:

The Stewardship Chair or District Governor, as appropriate, has the responsibility of reporting and investigating any and all alleged conflicts of interest, which are reported, or which are discovered.

Authorization and Agreement

This Memorandum of Understanding (MOU) is an agreement between the requesting club and CNY Rotary (District 7180), and acknowledges that the requesting club will undertake measures to ensure the proper implementation of grant activities and proper management of Foundation grant funds. By authorizing this document the requesting club agrees to comply with all of the conditions and requirements set forth herewith.

Please Read Fillable Forms Instruction Document First



THE ROTARY FOUNDATION 2024-2025 CNY Rotary
Memorandum of Understanding
This is a QUALIFYING DOCUMENT

Club Qualifications:

To participate in Rotary Foundation grants the requesting club must agree to implement the financial and stewardship requirements in this Memorandum of Understanding (MOU) provided by The Rotary Foundation (TRF) and CNY Rotary (District 7180). To participate in Rotary Foundation District Grant, a CNY Rotary Club must be qualified. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.

***Please Note:** Club qualification status may be suspended or revoked for the misuse or mismanagement of grant funds involving, but not limited to: fraud, forgery, membership falsification, gross negligence, the endangerment of the health, the welfare, or the safety of beneficiaries, ineligible contributions, use of funds for personal gain, undisclosed conflicts of interest, monopolization of grant funds by individuals, the falsification of any reports, overpricing, acceptance of payments from beneficiaries, illegal activities, and the use of grant funds for ineligible purposes.

Club Qualifications Checklist:

Please Note: All qualification items listed below must be completed and checked-off prior to the application deadline of June 1, 2024.

- ☐ List the members of your club who have completed the Grants Management Seminar in the current Rotary year (minimum two members required)

Name

Date Completed

- ☐ Cooperate with any financial, grant, or operational audits
- ☐ Be current on all Rotary International and CNY Rotary/District 7180 dues
- ☐ Club is current on all applicable grant reports

Please note: If you have any open grants you will need to submit a Final Report and all necessary documentation. If your project is not completed, you will need to submit an Interim Report. All final reports are to be submitted no later than July 31, 2024 via email to grants@cnyrotary.org

- ☐ Club has submitted, or is in the process of submitting, required annual 990 filings with the IRS as a 501(c)(4) organization

Club Officer Responsibilities:

- ☐ Appoint at least one Club member to implement, manage, and maintain club qualification
- ☐ Ensure all TRF grants adhere to stewardship measures and proper grant management practices
- ☐ Ensure all individuals involved in the grant project conduct their activities in a way which avoids any actual or perceived conflict of interest



THE ROTARY FOUNDATION 2024-2025 CNY Rotary
Memorandum of Understanding
This is a QUALIFYING DOCUMENT

Submit no later than June 1, 2024, hand signed and emailed to
grants@cnyrotary.org

We, being responsible for administering grant activities for the Rotary Club of _____, certify that the club will adhere to the requirements listed in this Club Memorandum of Understanding and will notify CNY Rotary of any changes or revisions to club policies and procedures related to these requirements.

MEMORANDUM OF UNDERSTANDING

CURRENT CLUB PRESIDENT		CLUB PRESIDENT-ELECT	
Term	2023-2024	Term	2024-2025
Name		Name	
Signature		Signature	
Date		Date	

For your convenience, if you are filling out this form on a Windows or Mac PC, the buttons to the right may be used to save or print a copy of your form as well as submit your form via email to grants@cnyrotary.org. Note: the EMAIL button will automatically attach this form.

SAVE

PRINT

EMAIL

DISTRICT GRANT - REPORTING

- Expenditures must be completed by end of Rotary year
 - Final Reports Due by 7/31
 - District grants must be completed within Rotary year
 - Regional Grants can extend 12 months (but expenses incurred in Rotary year of grant / final report due 7/31)
- Interim reports required, due by 1/31 when Final Reports have not been sent
- Final reports due no later than July 31

TYPE OF GRANTS / REQUIREMENTS

Item	Global Grant	District / Regional Grant	District Grant	Scoring
Officers listed for Grant Year (upcoming) in Rotary.org / District site	Required	Required	Required	
Club goals recorded for Grant Year (upcoming) in Rotary.org	Required	Required	Required	
Foundation goals recorded for Grant Year (upcoming) in Rotary.org	Required	Required	Required	
Application outlines grant funding including required match	Required	Required	Required	
Application approval - Current and Grant Year Presidents	Required	Required	Required	
Aligns with Rotary Area of Focus	Required	Required	Required	
Project Description (impact)	Required	Required / Scored	Required	0-10
Project timeline / project plan	Required	Required / Scored	Required	0-10
Public relations / communications plan / visibility	Required	Required / Scored	Required	0-10
Financial commitment / matching funds / budget	Required	Required / Scored	Required	0-10
Rotarian involvement	Required	Recommended / Scored	Recommended	0-5
Partner organizations	Recommended	Recommended / Scored	Recommended	0-5
Community Assessment / Needs Assessment	Required	Recommended / Scored	Recommended	0-5
Sustainability	Required	Recommended / Scored	Recommended	0-5
Foundation Support	Recommended	Recommended / Scored	Recommended	0-5
Have not recently received Regional Grant	n/a	Recommended / Scored	n/a	0-5

GRANT APPLICATION – WHERE TO FIND

The screenshot shows the CNYRotary.org website. The browser's address bar is highlighted with a red box, showing the URL cnyrotary.org. The website's navigation bar includes links for Home, News Network, Events Calendar, More To Do, Club Resources, More Resources, and Get Involved. A dropdown menu is open under 'Club Resources', showing options like Find A Leader, Learning Resources, Membership, Public Image Tools, DEI, Foundation, Youth, and Service. The 'Foundation' dropdown is further expanded, showing 'CNY Foundation Committee', 'District Grants', 'Global Grants', and 'Foundation Giving'. A red arrow points to the 'District Grants' link. Below the navigation bar, there is a banner for 'CONFERENCE OF CHAMPIONS THANK YOU' and a section titled 'HEAR THE PRESIDENT'S OFFICIAL TALK' with a 'Watch Video Now' button. At the bottom, there is a banner for 'EPIC DAY OF SERVICE JOIN IN May 17, 2025' and a section titled 'All clubs are encouraged to plan a service project on this day (or near it!)' with a list of bullet points: 'Energize your members', 'Get visibility in your community and beyond', and 'Raise money and awareness for your club'. The Windows taskbar is visible at the bottom of the screen.

Home Page | CNY Rotary

← → ↻ cnyrotary.org 🔍 ☆ 📁 👤 ⋮

Search Member Login

Rotary Home **News Network** Events Calendar More To Do Club Resources More Resources Get Involved

CONFERENCE OF CHAMPIONS THANK YOU

Welcome to the new home for CNY Rotary. Please take some time to peruse the many pages we have. Scroll down for the latest news from President Lizzy, quick links to our org chart and so much more. We hope you find the support your club needs to grow!

HEAR THE PRESIDENT'S OFFICIAL TALK

With more than 110 clubs in CNY, the regional President will not be able to visit every club individually to deliver the traditional talk with messages from Rotary International. President Lizzy has pre-recorded this talk in a video that has been shared with all club leaders. It features information about our annual theme, The Magic of Rotary, our RI President Stephanie's priorities for the year, and a preview of what to expect in our newly expanded region. At 22 minutes long, it can be used as a program at an upcoming meeting, or members can watch on their own. It is available on YouTube to watch anytime, on any device.

[Watch Video Now](#)

EPIC DAY OF SERVICE JOIN IN May 17, 2025

DO MORE GOOD

Plan & Submit Your Service Project

All clubs are encouraged to plan a service project on this day (or near it!)

- Energize your members
- Get visibility in your community and beyond
- Raise money and awareness for your club

LOOKING TO CONNECT?

Join Leaders
Exchange Ideas
Take Action

<https://cnyrotary.org/page/cny-foundation-grants>

Windows taskbar: Type here to search, 5:01 PM 4/14/2025

CNYROTARY.ORG > CLUB RESOURCES > FOUNDATION > DISTRICT GRANTS

GRANT APPLICATION – WHERE TO FIND

DOWNLOADABLE FORMS

The links below will provide the forms necessary for your club to complete the grant application process.
CLICK HERE FIRST to view and download helpful instructions on how to use these forms.

[CNY Rotary Grant Application](#)



[CNY Rotary Club MOU](#)

[CNY Rotary Budget Worksheet](#)

[CNY Rotary Final Report Form 24-25 Project Year](#)

[CNY Rotary Final Report Form 25-26 Project Year](#)

[International Project Addendum](#)

[CNY Rotary Grants FAQs](#)

Helpful Resources

[Grant Management Seminar Slides](#)

[District Grants Terms & Conditions](#)

[Global Grants Terms & Conditions](#)

CNYROTARY.ORG > CLUB RESOURCES > FOUNDATION > DISTRICT GRANTS


GRANT APPLICATION – WALKTHRU


CNY-District-Grant-Application-041025.pdf - Adobe Acrobat Pro

File Edit View Document Comments Forms Tools Advanced Window Help

Please fill out the following form. If you are a form author, choose Distribute Form in the Forms menu to send it to your recipients. Highlight Fields

Please Read Fillable Forms Instructions Document First

 **THE ROTARY FOUNDATION 2025-26 CNY Rotary District Grant Application**


This is a QUALIFYING DOCUMENT  Indicates items required of all grants and will also be scored for regional grant applications

PROJECT DATES BETWEEN July 2025 to June 30, 2026

Sponsoring Rotary Club:

Project Title:

Project Start Date: Projected Completion Date:

Describe the project. Please provide specific and detailed information to explain the scope of community impact and the unmet need(s) this project will address. If possible, indicate how many people will be positively affected by the project. (add an attachment if necessary) 

50-WORD Summary. Please provide a project summary, **not to exceed 50 words**, that describes the project and the benefit to the community. **This 50 word summary will be used by The Rotary Foundation to evaluate your project.**

Submit by June 1, 2025 via email to grants@cnyrotary.org

GRANTS TRAINING / TIMELINE

Wednesday, Feb 26	GMS session 1 of 3 & Q&A (Zoom 7pm)
Saturday, March 15	Empire MD PELS (Syracuse)
Sunday, March 23	GMS session 2 of 3 & Q&A (Zoom)
Friday, April 4	District Assembly (Albany)
Monday, April 14	GMS session 3 of 3 & Q&A (Zoom)
April 15	Applications for District Grants – open date
TBD, May	Global Grants training / refresher
June 1	Deadline for 2025-2026 District Grants
July 1	Start of Rotary 2025-26 year
<i>July 31, 2025</i>	<i>Final Reports Due for 2024-25 Grants</i>
January 31, 2026	Interim reports due
June 30, 2026	End of Rotary 2025-26 year
July 31, 2026	Final Reports Due for 2025-26 Grants

CLUB NOTIFICATION

July / Aug timeframe... Clubs receive email notification of status of grant applications (once Rotary publishes amounts available & accepts District's Application)

District Grants:

- Notification (congratulations) confirms amount awarded (based on # of complete applications & available funds)

Regional Grants:

- Notification (congratulations) contains amount awarded

Or

- Regrets (due to lack of funding) – encourage clubs to consider applying again in future years

Notifications to reiterate key dates (i.e. interim report, final report) and emailed to key contacts listed on grant applications – list of clubs / grants posted on CNY/7180 website

grants@cnyrotary.org

IDEAS TO CONSIDER – PEACE INITIATIVES

- Avenues for taking action:
 - Peace Fellowships (MyRotary.org)
 - Mediators Beyond Borders International (future webinar)
 - Positive Peace Academy (<https://www.positivepeace.academy>)
 - Friendship Exchanges (more info coming soon)
 - Opportunities for Peace Building (District Grants)
 - Peace Pole (Raffle at District Conference)
 - Peace Subcommittee will be in the Rotary Village

APPENDIX – ADDITIONAL INFORMATION

Helpful slides from prior training sessions / overviews

TOPICS

FOR ALL GRANTS:

- ROTARIAN PARTICIPATION REQUIRED
- MUST MEET AREAS OF FOCUS
- DISTRICT DESIGNATED FUNDS PROVIDE SUPPORT
- LEVEL OF SUPPORT IS DEPENDENT ON TYPE OF REQUEST
- TRAINING, STEWARDSHIP, PARTICIPATION REQUIRED
- SIGNED MEMORANDUM OF UNDERSTANDING REQUIRED
- **NO CONFLICTS OF INTEREST**
- MUST HAVE FINANCIAL MANAGEMENT PLAN AND BUDGET
- MUST FILE APPROPRIATE REPORTS ON TIME
- RETAIN DOCUMENTS FOR 5 YEARS
- THIS SEMINAR IS FOCUSED ON DISTRICT GRANTS
- Upcoming GRANTS MANAGEMENT SEMINAR – March & April

DISTRICT GRANT FUNDING (EXAMPLE)

- District Grant – total available funds from TRF of \$60,000
 - District Grant (traditional) - \$40,000 available
 - Regional Grant (scored) - \$20,000 available
- 30 clubs apply for District Grants requests range from \$500 to \$2,000
 - Total funds requested = \$50,000
 - Max amount applied so funds requested don't exceed available \$40K (i.e. \$1400 max award)
- 6 clubs apply for Regional Grants requests ranging from \$1,000 to \$10,000
 - Total funds requested = \$45,000 (funds available \$20,000)
 - Based on scoring / review –
 - One club awarded full request of \$10,000
 - One club awarded full request of \$5,000
 - One club receives portion of requested funds of \$5,000
 - Three clubs don't receive funding

SCHOLARSHIP – EXAMPLE BUDGET

BUDGET SUMMARY (from completed Budget Worksheet):

Contribution - Lead Rotary Club	1000
Contribution - Participating Rotary Clubs	
Contribution - Other Sources	
Grant Funds Requested	500
Total Revenue	1500
Total Expenses (total cost of project)	1500

Maximum Matching District Grant Awards

DG - Scholarship	\$.50 award for every \$1 raised
DG - Non-Scholarship	\$1 award for every \$1 raised
Regional Grant	\$2 award for every \$1 raised



BUDGET SUMMARY (from completed Budget Worksheet):

Contribution - Lead Rotary Club	0
Contribution - Participating Rotary Clubs	
Contribution - Other Sources	
Grant Funds Requested	2000
Total Revenue	2000
Total Expenses (total cost of project)	2000

Maximum Matching District Grant Awards

DG - Scholarship	\$.50 award for every \$1 raised
DG - Non-Scholarship	\$1 award for every \$1 raised
Regional Grant	\$2 award for every \$1 raised



BUDGET SUMMARY (from completed Budget Worksheet):

Contribution - Lead Rotary Club	500
Contribution - Participating Rotary Clubs	500
Contribution - Other Sources	3000
Grant Funds Requested	2000
Total Revenue	6000
Total Expenses (total cost of project)	6000

Maximum Matching District Grant Awards

DG - Scholarship	\$.50 award for every \$1 raised
DG - Non-Scholarship	\$1 award for every \$1 raised
Regional Grant	\$2 award for every \$1 raised



REGIONAL GRANT – EXAMPLE BUDGET

BUDGET SUMMARY (from completed Budget Worksheet):

Contribution - Lead Rotary Club	2000
Contribution - Participating Rotary Clubs	3000
Contribution - Other Sources	
Grant Funds Requested	10000
Total Revenue	15000
Total Expenses (total cost of project)	15000

Maximum Matching District Grant Awards

DG - Scholarship	\$.50 award for every \$1 raised
DG - Non-Scholarship	\$1 award for every \$1 raised
Regional Grant	\$2 award for every \$1 raised



BUDGET SUMMARY (from completed Budget Worksheet):

Contribution - Lead Rotary Club	500
Contribution - Participating Rotary Clubs	
Contribution - Other Sources	
Grant Funds Requested	5000
Total Revenue	5500
Total Expenses (total cost of project)	7500

Maximum Matching District Grant Awards

DG - Scholarship	\$.50 award for every \$1 raised
DG - Non-Scholarship	\$1 award for every \$1 raised
Regional Grant	\$2 award for every \$1 raised



BUDGET SUMMARY (from completed Budget Worksheet):

Contribution - Lead Rotary Club	1000
Contribution - Participating Rotary Clubs	1000
Contribution - Other Sources	3000
Grant Funds Requested	10000
Total Revenue	15000
Total Expenses (total cost of project)	15000

Maximum Matching District Grant Awards

DG - Scholarship	\$.50 award for every \$1 raised
DG - Non-Scholarship	\$1 award for every \$1 raised
Regional Grant	\$2 award for every \$1 raised

