

# GRANT MANAGEMENT SEMINAR

**Monday, April 1, 2024**

**Rotary Year 2024-2025  
CNYRotary / District 7180**



# FOUNDATION COMMITTEE 2024-2025

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# 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 CONFLICT 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
- NEXT GRANTS MANAGEMENT SEMINAR, APRIL 1, 2024

# APPROACH

- Continue to fund club projects / grants
- Support projects big and small
- Support clubs big and small
- Manage process within available funding
- Leverage best practices from all 3 Districts
- Simplify application process & administration
- Streamline review process
- Think BIG !! – Fund and publicize great projects!
- Administer with Four Way Test in mind...

# GRANTS – HISTORICAL OPTIONS

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

- **\$30,000 or more – GLOBAL GRANT**
- **\$500 to \$2,500 – DISTRICT GRANT**

# GRANTS MODEL / UPDATE

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

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

# REGIONAL GRANT

- **Our “new” type of District Grant for larger scale, more impactful grants !**
- Clubs can apply and ask for **\$10,000 max** (\$1,000 min)
- Similar to Global Grants – funded based on matching funds
- **Can request matching funds of \$2 per \$1 raised**
- Applications meet ALL requirements of District Grant + Scored ...

# REGIONAL GRANT

- 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)
- 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*)

# 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

# DISTRICT GRANT FUNDING

- 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 where 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 officers	Required	Required	Required	
Aligns with Rotary Area of Focus	Required	Required	Required	
Project Description (impact)	Required	<b>Required / Scored</b>	Required	<b>0-10</b>
Project timeline / project plan	Required	<b>Required / Scored</b>	Required	<b>0-10</b>
Public relations / communications plan / visibility	Required	<b>Required / Scored</b>	Required	<b>0-10</b>
Financial commitment / matching funds / budget	Required	<b>Required / Scored</b>	Required	<b>0-10</b>
Rotarian involvement	Required	<b>Recommended / Scored</b>	Recommended	<b>0-5</b>
Partner organizations	Recommended	<b>Recommended / Scored</b>	Recommended	<b>0-5</b>
Community Assessment / Needs Assessment	Required	<b>Recommended / Scored</b>	Recommended	<b>0-5</b>
Sustainability	Required	<b>Recommended / Scored</b>	Recommended	<b>0-5</b>
Foundation Support	Recommended	<b>Recommended / Scored</b>	Recommended	<b>0-5</b>

# GRANT APPLICATION

- Review of Grant Application template
  - Examples / suggestions
- Budget Template
- MOU Template
- Questions & Answers

# 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

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# PUBLICITY PLAN – REGIONAL GRANT

## **PUBLIC RELATIONS/PUBLICITY/MEDIA**



How will Rotary be identified at the project site with proper branding? For Regional Grants, please provide your detailed communication /PR plan (attachments accepted).

Will be posting picture of check presentation on our facebook page.



# PUBLICITY PLAN – REGIONAL GRANT

## **PUBLIC RELATIONS/PUBLICITY/MEDIA**



How will Rotary be identified at the project site with proper branding? For Regional Grants, please provide your detailed communication /PR plan (attachments accepted).

Participating clubs are coordinating PR efforts with District PR committee to leverage key media contacts.

Signage has been budgeted to promote 2 summer fundraisers with newspapers and social media posts to coincide.

News conference planned for early September with school officials to feature rooms full of backpacks and Rotary volunteers preparing to help with distribution.

Additional media blitz in February and April to highlight the program support during vacation weeks and fundraise for following school year.

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Financial commitment / matching funds / budget	Required	<b>Required / Scored</b>	Required	<b>0-10</b>
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Community Assessment / Needs Assessment	Required	<b>Recommended / Scored</b>	Recommended	<b>0-5</b>
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Foundation Support	Recommended	<b>Recommended / Scored</b>	Recommended	<b>0-5</b>

# GRANTS TRAINING / TIMELINE

Wednesday, Feb 7 <sup>th</sup>	District Grants Overview (Zoom 7pm)
Saturday, March 16	Empire MD PETS (Syracuse)
Monday, April 1	District Grants Overview – Q&A (Zoom 7pm)
Saturday, April 6	District Assembly (Verona)
<b>April 15</b>	<b>Applications for District Grants – open date</b>
Saturday, April 28	District Conference (Binghamton)
TBD, May	Global Grants training / refresher
<b>June 1</b>	<b>Deadline for 2024-2025 District Grants</b>
July 1	Start of Rotary 2024-25 year
January 31, 2025	Interim reports due
June 30, 2025	End of Rotary 2024-25 year
<b>July 31, 2025</b>	<b>Final Reports Due</b>

# CLUB NOTIFICATION

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

## **District Grants:**

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

## **Regional Grants:**

- Notification (congratulations) which 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 7180 website***

[grants@cnyrotary.org](mailto:grants@cnyrotary.org)