

# **DISTRICT DESIGNATED FUNDS, DISTRICT GRANTS, AND GLOBAL GRANTS POLICY MANUAL**



**DISTRICT 5180 ROTARY FOUNDATION COMMITTEE**

**2023**

**Revised 2/13/2023**

# **Rotary District 5180**

## **District Designated Funds, District Grants, and Global Grants Policy**

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## 1. PURPOSE

This policy document provides direction to the District and Clubs of the District for allocating District Designated Funds (DDF), authorizing Global Grants, awarding District Grants, and performing overall Stewardship of the grant program managed by the District. A glossary of terms used in this policy is included herein as Appendix 1. The approved Policy shall be posted on the District website.

## 2. OVERVIEW

The Rotary Foundation's grant program supports district and club humanitarian and educational projects through two types of grants: District Grants and Global Grants.

- **District Grants** are block grants to the District that allow clubs and districts to address immediate needs in their own communities. District Grants may be for projects that the District, through its grant approval process, believes support the humanitarian and educational activities that relate to the mission of The Rotary Foundation (TRF).
- **Global Grants** are grants that range from \$30,000 to \$500,000. The minimum award from TRF is \$15,000, and the award must be matched by the applicant using District Designated Funds (DDF) or other funding sources, resulting in a minimum \$30,000 total project cost. Global Grants fund large international humanitarian projects, vocational training teams, and scholarships that have sustainable and measurable outcomes in one or more of the following Areas of Focus:
  - Disease Prevention and Treatment.
  - Peace and Conflict Resolution.
  - Clean Water, Sanitation and Hygiene.
  - Maternal and Child Health.
  - Basic Education and Literacy.
  - Economic and Community Development.
  - Supporting the Environment.

The District Rotary Foundation Committee Chair (DRFCC) and the Grants Sub-Committee Chair form the Grant Approval Committee and are charged with deciding the priorities and allocation plans for how the District will use its District Designated Funds. The priorities and allocation plans are developed and approved in consultation with the District Governor, the District Governor-Elect, and the District Foundation Committee.

Because the TRF grant application and approval process and the schedule for Global Grants differ from those for District Grants, Global DDF Proposals are evaluated individually as they are received. All District Grant Applications are evaluated at the same time and ranked for inclusion in the District Block Grant Application to TRF.

Each year, TRF notifies District 5180 of the available DDF, which generally represents 50 percent of the Annual Fund contributions made during the period three-years earlier. For example, the DDF for 2022-23 comes from the Annual Fund SHARE contributions made in 2019-20. This DDF is divided equally into two categories, Global DDF and District DDF.

All unused DDF from prior years and unused funds returned from earlier grants is rolled over to the District's Global DDF Fund. TRF retains all Global DDF in its treasury as a ledger account for D5180 and allocates it based on District approval of a DDF allocation request.

District Grant DDF is awarded to the District based on a Block Grant Application (only one application is permitted each year) submitted by the District. District 5180 submits its Block Grant request after the District Grant application period has concluded. District DDF is received as cash to a District checking account dedicated to district grants.

### **3. GRANT APPROVAL PROCESS**

The District 5180 Foundation Committee, in consultation with the District Governor and the District Governor-Elect, will review, update as necessary, and approve the "District Designated Funds, District Grants, and Global Grants Policy Manual" for the Rotary year.

### **4. ROTARY CLUB GRANT QUALIFICATION REQUIREMENTS**

Clubs must meet the following qualification requirements to participate in District and The Rotary Foundation grant programs:

**4.1 General Requirements:** The Club Presidents and Presidents-Elect must sign a Club Memorandum of Understanding (MOU) (Appendix 2), with any applicable district addendum (Appendix 3), and submit them to the District Stewardship Chair along with their training diplomas indicating that they have completed the required training. The club must:

- Be current on its dues, and in good standing with the District and Rotary International.
- Be current on its tax returns.
- Be current on all District and Global grants reporting requirements.

## 4.2 Training Requirements:

- The following people must complete the District 5180 Grants Seminar and TRF online Grants Management Seminar (**must print and submit the TRF diploma**):
  - The President-Elect.
  - Writer of the District Grant.
  - All persons on a Global Grant.
- The training is also recommended for:
  - Club TRF Chair.
  - Club Treasurer.
  - District Grant Committee members.
  - Potential grant applicants and any other interested club members.
- The link to the online course is:  
<https://learn.rotary.org/learn/lp/101/grant%2520management%2520>
- It is recommended that the following persons also complete the grants training:
  - Club Foundation Chairs.
  - Club Grant Committee Members.
  - Potential grant applicants.
  - Club Treasurers.
  - All interested club members.
  - Any grant will not be accepted unless the training has been completed (**the diplomas must be printed out and submitted to the District Stewardship Chair**).

**4.3 Club Qualification:** Qualification is valid for that Rotary year and grant cycle.

## 5. DISTRICT DESIGNATED FUNDS (DDF)

### 5.1 DDF Distribution

5.1.1 District Grant DDF: District 5180 distributes DDF for District Grants through a competitive process. Reimbursement for approved district grant projects will be made at 50 percent of project expenses, up to \$5,000. If a club spends \$10,000 on district grant projects, it will be reimbursed with \$5,000 of district grant DDF. This is to encourage large community projects that highlight the good work that Rotary does. Community projects, RYLA, and scholarships at all levels, are projects that can receive approval.

5.1.2 Global Grant DDF: District 5180 allocates all Global Grant DDF on an allocation process based on 25 percent of what a club gave to the Annual Fund SHARE three-years prior (Appendix 4). DDF matches cash on a 1:1 basis; the cash can be from the club, or a combination of clubs. Clubs are encouraged to join together on grants to combine their cash and DDF to do larger grants.

5.1.3 Insufficient DDF: If requests exceed available DDF, the requests will be ranked by the Grant Review Panel.

## **5.2 DDF Funding and Record Keeping**

5.2.1 Record Keeping: The District Rotary Foundation Committee Chair is responsible for maintaining accurate records to plan for and track the district's DDF funds. The approved distribution of DDF shall be posted on the District website.

5.2.2 Limitations to Allocation of DDF: Because of the limited amount of DDF available for both District and Global DDF, the following limitations will apply.

5.2.2.1 District Grant DDF -- If the district receives more requests than there is DDF available, the proposed projects will be ranked according to:

- The projected positive impact on the community.
- The number of people potentially benefiting.
- The number of Rotarians involved in the project.

5.2.2.2 Global Grant DDF – Available DDF will be allocated based on Appendix 4. Clubs are encouraged to join together on global grants to combine DDF and cash to do larger projects.

5.2.3 Strategic Plan: The District Rotary Foundation Committee Chair is responsible for ensuring annual review and updating of the Committee's Strategic Plan.

## **6. GRANTS**

**6.1 Grant Online Application System:** The District will use an online application system. Applicants should consult the District website for application instructions.

6.1.1 Final Grant Application Submission Period; Limitations: Final applications for District Grants must be submitted to the Grants Sub-Committee Chair **by May 26, 2023. Final reports can be submitted as soon as proper documentation is available, but are due no later than May 10, 2024.** Consult the District website for application instructions.



6.1.2. District Block Grant Request to TRF; District Grant award to clubs: Upon completion of the review, the Grant Review Panel will submit recommendations to the Grant Approval Committee for inclusion in the District Block Grant Request to TRF. Clubs will be notified once the Block Grant has been approved by TRF and funding has been authorized. TRF has final approval on all District Block Grant Requests. Do not start work on a project until notice of approval by TRF. (Please note that TRF approval of the District Block Grant may take several weeks or longer to complete).

6.1.3 Block Grant Approval: Typically, TRF approval of our Block Grant is received by the end of July, but that is not a guarantee. Applicants need to be aware that any funds spent on a grant project prior to receiving TRF approval are not considered eligible expenses. The District will not authorize any exceptions.

6.1.4 Terms and Conditions: When completing an application, applicants should be mindful that the Grant Review Panel (see Appendix 1: Glossary) is comparing it to other applications, and it is the applicant's responsibility to provide sufficient information for the committee to fairly evaluate the application. Potential conflicts that might result in a personal benefit to the applicant or another Rotarian are not disqualifiers but should be thoroughly reported. Please refer to the Terms and Conditions guidance provided by The Rotary Foundation.

6.1.5 Posting Approved District Grants: The approved District Block Grant, with details, shall be posted on the District website.

**6.2 District Grant Evaluation Criteria:** Grants will be evaluated on the basis of the following criteria:

6.2.1 Does the applicant agree to adhere to the Terms and Conditions for Rotary Foundation District Grants and Global Grants?

6.2.2 Has the proposing club met the Qualification requirements of the District (i.e., MOU and Grant Management Training)? Has the Club MOU been signed by the President and the President-Elect and submitted to the District Stewardship Chair prior to application for a grant?

6.2.3 Have potential conflicts of interest been noted in the application?

6.2.4 Has the applicant certified that they have reviewed the TRF Grant Management Manual?

6.2.5 Has the applicant certified that they have attended/or watched the District Grant/Global Grant training and the Learning Center Grant Management Seminar?

6.2.6 Has the District Grant Application been approved by the sponsoring Club Board of Directors, Club President, and Club President-Elect?

6.2.7 No to any question above disqualifies an application.

**6.3 District Grant Ranking Criteria:** Once an application has successfully qualified, it will be evaluated and ranked on the following criteria:

6.3.1 Completeness: Has adequate information been given to all questions on the Application Form?

6.3.2 Value to community: What meaningful benefit will the project have in the community?

6.3.3 Feasibility: What is the likelihood that the project can be implemented as planned?

6.3.4 Sustainability: What anticipated lasting impact will the project have beyond the grant period? Are ongoing commitments made to continue the project beyond the grant?

6.3.5 Visibility: How will awareness of Rotary be promoted locally?

6.3.6 Community Support: What, if any, non-Rotary support will be given in planning and implementing the project?

6.3.7 Funding Sources: What proportion of project funds will come from Club and other non-DDF sources?

**6.4 Global Grant Applications:** TRF will accept Rotary Foundation Global Grant Applications on a rolling basis throughout the year. The process for submitting proposals for D5180 Global Grant DDF funding requests is as follows:

6.4.1 Submitting Global Grant Application Form: For Global Grants requesting DDF, District 5180 clubs are first required to submit a Global Grant Applications Form to the Grants Sub-Committee Chair. Global Grant Application Forms can be found on the District website.

6.4.2 Grant Application Form Submittal Timeline: Global Grant Application Forms will be accepted for review throughout the year on a first-come, first-served basis.

6.4.3 Submittal of Memorandum of Understanding: The Global Grant Application Form must also include a copy of the Club-signed TRF MOU and District 5180

MOU addendum, as well as certification that all signatories have completed the Rotary online Grants Management Training and District 5180 Grants Training as outlined in "Training Requirements" (Section 4.2).

6.4.4 Contributions to Other District's Global Grants: For clubs that want to contribute to other district's global grants, they must still submit a Global Grant Application Form which states how much cash they will contribute and how much DDF they want to contribute.

6.4.5 DDF Allocation To Club Once approved by the Grant Approval Committee, DDF will be allocated (held in reserve) for the proposed Global Grant. The club may then complete the submittal of its Global Grant application to TRF.

- 6.4.6 Global Grant Application Submittal to TRF: The Club must submit the Global Grant draft application to TRF within 90 days after the DDF allocation has been approved or the DDF allocation may be rescinded. A copy of the completed TRF grant application, in Adobe PDF format, must be submitted to the Grants Sub-Committee Chair concurrent with submittal to TRF.
- 6.4.7 Reallocating Funds to Club: It is strongly recommended that members consult with the Global Grants Chair throughout the process to allow for better planning of DDF allocation. If the Global Grant proposal is not approved by TRF, the District will re-allocate the DDF for use with other Global Grants projects in the usual manner. Funds are not reserved. Global Grant Application Forms submitted after all Global Grant DDF are exhausted will be retained and administered on a first-come, first-served basis, should additional funds become available or when the next grant year begins.

**6.5 Global Grant DDF Evaluation Criteria:** Grants will be evaluated on the basis of the following criteria:

6.5.1 Will the proposed project comply with the Terms and Conditions for Rotary Foundation District Grants and Global Grants?

6.5.2 Has the proposing club met the Qualification requirements of the District (i.e., MOU and Grant Management Training-both District 5180 and Rotary online)?

6.5.3 Has the applicant disclosed any potential conflicts of interest in the application to TRF?

6.5.4 Has the Global Grant Application Form been approved by the

sponsoring Club Board of Directors, Club President, and Club President-Elect?

6.5.5 No to any question above disqualifies an application.

**6.6 Global Grant Application Considerations:** Once an application has successfully qualified, it will be evaluated and ranked on the following criteria:

6.6.1 Completeness: Has adequate information been provided on the Global Grant Application Form?

6.6.2 Value to community: What meaningful benefit will the project have in the community?

6.6.3 Feasibility: What is the likelihood that the project can be implemented as planned?

6.6.4 Broad Rotary Support: Is there support of the project by multiple clubs (encouraged)?

**6.7 Content Changes:** The District 5180 Grant Approval Committee may require other specific content changes in the proposal to receive DDF. Any such changes are intended to strengthen the proposal at TRF.

## APPENDIX 1: GLOSSARY

**District DDF** - District Designated Funds available for District Grants.

**District Rotary Foundation Committee Chair** - The District Rotary Foundation Committee Chair (DRFCC) is recommended by the District Governor, District Governor-Elect, and the District Governor-Nominee and appointed by Rotary International for a three-year term. In cooperation with the District Governor, the DRFCC oversees all aspects of the District Foundation program.

**Foundation Committee** - A committee consisting of the District Governor, District Rotary Foundation Committee Chair, Grants Sub-Committee Chair, Global Grants Chair, District Grants Chair, District Scholarship Chair, Stewardship Chair, Rotary Peace Fellowships Chair, Polio Plus Chair, and other areas as seems necessary, such as the International Service, Rotary Direct, EREY, or Legacy Giving Chairs.

**Global DDF** - District Designated Funds available for Global Grants.

**Grant Applicant** - A Rotary Club that has submitted a District Grant Application or Global Grant Proposal.

**Grant Approval Committee** - A committee consisting of the Global Grants Chair, the District Grants Chair, and the District Rotary Foundation Committee Chair, that allocates DDF and approves grants.

**Grant Review Panel** - A panel consisting of the District Rotary Foundation Committee Chair, Grants Sub-Committee Chair, Global Grants Chair, District Grants Chair, and other members of the District Rotary Foundation Committee as seems necessary. The purpose of the Grant Review Panel is to process and evaluate proposals for the use of DDF, assist clubs with Global Grant applications, recommend approval of District Grant applications, and provide recommendations to the Grant Approval Committee.

**Grants Management Trained** - A Rotarian who has completed the District-required grants management training program for the appropriate grant period.

**Grants Management Training** - Required training for any club prior to applying for a grant.

**Grants Sub-Committee Chair** - The Grants Sub-Committee Chair is responsible for coordinating all use of DDF proposals, and grant applications, and managing the Grant Review Panel. They oversee the Global Grants Chair, the District Grants Chair and the District Scholarships Chair.

**Memorandum of Understanding** - Required agreement between the club and district for participating in the grant programs. A Co-Operating Organization Memorandum of Understanding (Global Grant) is also required if applicable.

**Rotary Club (Club)** - A properly constituted dues paying Rotary Club of District 5180. Also an officially chartered Rotaract Club.

**Stewardship Chair** - The Stewardship Chair is responsible for ensuring the careful management of Rotary Foundation grant funds and for educating Rotarians on proper and effective grant management

**TRF** - The Rotary Foundation

## **APPENDIX 2: CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING (MOU)**

### **THE ROTARY FOUNDATION**



## **CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING**

### **THE ROTARY FOUNDATION**

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds

#### **1. Club Qualification**

To participate in Rotary Foundation grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF) and to send at least one club member to the district's grant management seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in district grants. By completing these requirements, the club becomes qualified and eligible to participate in Rotary grants.

- A. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.
- B. To maintain qualified status, the club must comply with this MOU, any additional district requirements, and all applicable TRF policies.
- C. The club is responsible for the use of funds for club-sponsored grants, regardless of who controls the funds.
- D. Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification;

overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes.

E. The club must cooperate with any financial, grant, or operational audits.

## **2. Club Officer Responsibilities**

The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants.

Club officer responsibilities include;

- A. Appointing at least one club member to implement, manage, and maintain club qualification
- B. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices
- C. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest.

## **3. Financial Management Plan**

The club must have a written financial management plan to provide consistent administration of grant funds.

The financial management plan must include procedures to:

- A. Maintain a standard set of accounts, which includes a complete record of all receipts and disbursements of grant funds
- B. Disburse grant funds, as appropriate
- C. Maintain segregation of duties for handling funds
- D. Establish an inventory system for equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities
- E. Ensure that all grant activities, including the conversion of funds, comply with local law

## **4. Bank Account Requirements**

In order to receive grant funds, the club must have a dedicated bank account that is used solely for receiving and disbursing TRF grant funds.

- A. The club bank account must:
  - 1. Have a minimum of two Rotary member signatories from the club for disbursements
  - 2. Be a low- or noninterest-bearing account
- B. Any interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.
- C. A separate account should be opened for each club-sponsored grant, and the name of the account should clearly identify its use for grant funds.
- D. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.
- E. Bank statements must be available to support receipt and use of TRF grant funds.



- F. The club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.

## **5. Report on Use of Grant Funds**

The 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.

## **6. Document Retention**

The club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification and TRF grants. Retaining these documents supports transparency in grant management and assists in the preparation for audits or financial assessments.

- A. Documents that must be maintained include, but are not limited to:
  - 1. Bank information, including copies of past statements
  - 2. Club qualification documents including a copy of the signed club MOU
  - 3. Documented plans and procedures, including:
    - a. Financial management plan
    - b. Procedure for storing documents and archives
    - c. Succession plan for bank account signatories and retention of information and documentation
  - 4. Information related to grants, including receipts and invoices for all purchases
- B. Club records must be accessible and available to Rotary members in the club and at the request of the district
- C. Documents must be maintained for a minimum of five years, or longer if required by local law

## **7. Reporting Misuse of Grant Funds**

The club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the club that does not tolerate the misuse of grant funds.

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### **Authorization and Agreement**

*This memorandum of understanding is an agreement between the club and the district and acknowledges that the club will undertake measures to ensure the proper implementation of grant activities and proper management of TRF grant funds. By authorizing this document, the club agrees to comply with all of the conditions and requirements of the MOU.*

*On behalf of the Rotary/Rotaract Club of \_\_\_\_, the undersigned agree to comply with all of the conditions and requirements of the MOU for Rotary year \_\_\_\_ and will notify Rotary International District of any changes or revisions to club policies and procedures related to these requirements.*

<b>Club President</b>		<b>Club President-elect</b>	
<b>Term</b>		<b>Term</b>	
<b>Name</b>		<b>Name</b>	
<b>Signature</b>		<b>Signature</b>	
<b>Date</b>		<b>Date</b>	

### **APPENDIX 3: DISTRICT 5180 ADDENDUM TO TRF CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING (MOU)**

1. Club Qualification:

- a. For a club to be qualified to do grants, both district and global, the President-Elect and one other must be grant trained. If the club is doing a District Grant, the person doing it must be trained.
  - i. Training consists of attending the D5180 Grant Training Seminar, and completing TRF's Grant Management Seminar on the Learning Center. The diploma must be printed out or the course will still be labeled as "in process." Diplomas must be forwarded to the District Stewardship Chair.
- b. Both the President, and President-Elect must sign the TRF MOU and the D5180 Addendum to TRF MOU and send them to the District Stewardship Chair.

2. Global Grant Procedures:

- a. Clubs wanting to do a Global Grant, and be the International Partner or Host, must submit a Global Grant Application Form to the Global Grant Chair prior to going to the TRF Grant Center.
  - i. If the Global Grant is entered into the Grant Center before being approved at the district level, it will receive no DDF.
  - ii. The following forms must accompany the Global Grant Application Form:
    1. Completed Community Assessment Form identifying a need.
    2. A project plan to meet the need.
    3. A proposed budget to complete the plan.
  - iii. As part of the approval of the Global Grant request will be the determination of how much DDF will be allocated to the Global Grant.
  - iv. The POC, and all the Committee Members of the Global Grant, must be currently trained.
- b. Clubs wanting to contribute to someone else's Global Grant only have to submit a Global Grant Application Form to determine how much DDF they can allocate to the grant.

Club President:

Club President-Elect:

Term\_\_\_\_\_

Term\_\_\_\_\_

Name\_\_\_\_\_

Name\_\_\_\_\_

Signature\_\_\_\_\_

Signature\_\_\_\_\_

Date\_\_\_\_\_

Date\_\_\_\_\_

**APPENDIX 4: 2022-23 DISTRICT DESIGNATED FUNDS (DDF)**

	2019-20	50%	25%	25%
Club	Contribution	Total DDF	Dist. Grants	Global Grants
Arden Arcade	\$9,150	\$4,575	\$2,288	\$2,288
Carmichael	\$8,130	\$4,065	\$2,033	\$2,033
Citrus Heights	\$10,727	\$5,364	\$2,682	\$2,682
Clarksburg	\$0	\$0	\$0	\$0
East Sacramento	\$32,668	\$16,334	\$8,167	\$8,167
El Dorado Hills	\$1,730	\$865	\$433	\$433
Elk Grove	\$15,495	\$7,748	\$3,874	\$3,874
Fair Oaks	\$19,968	\$9,984	\$4,992	\$4,992
Folsom	\$17,026	\$8,513	\$4,257	\$4,257
Folsom Lake	\$2,751	\$1,376	\$688	\$688
Foothill Highlands	\$700	\$350	\$175	\$175
Gridley	\$0	\$0	\$0	\$0
Granite Bay	\$1,905	\$953	\$476	\$476
Passport One	\$3,873	\$1,937	\$968	\$968
Historic Folsom	\$2,700	\$1,350	\$675	\$675
Laguna Sunrise	\$5,727	\$2,864	\$1,432	\$1,432
Lincoln	\$5,745	\$2,873	\$1,436	\$1,436
Marysville	\$200	\$100	\$50	\$50
Midtown-Sacramento	\$2,583	\$1,292	\$646	\$646
Natomas	\$1,782	\$891	\$446	\$446
North Sacramento	\$11,375	\$5,688	\$2,844	\$2,844
Orangevale	\$13,239	\$6,620	\$3,310	\$3,310
Oroville	\$900	\$450	\$225	\$225
Oroville Sunrise	\$2,385	\$1,193	\$596	\$596
Pocket/Greenhaven	\$2,450	\$1,225	\$613	\$613
Point West	\$26,964	\$13,482	\$6,741	\$6,741
Rancho Cordova	\$6,673	\$3,337	\$1,668	\$1,668
Roseville	\$23,351	\$11,676	\$5,838	\$5,838
Sacramento	\$14,982	\$7,491	\$3,746	\$3,746
South Placer (Rocklin)	\$3,650	\$1,825	\$913	\$913
South Sacramento	\$6,990	\$3,495	\$1,748	\$1,748
South Yuba County Sunrise	\$2,150	\$1,075	\$538	\$538
Walnut Grove	\$1,525	\$763	\$381	\$381
West Sacramento	\$10,570	\$5,285	\$2,643	\$2,643
West Sacramento Centennial	\$7,440	\$3,720	\$1,860	\$1,860
Yuba City	\$4,786	\$2,393	\$1,197	\$1,197
Yuba Sutter Night Club	\$0	\$0	\$0	\$0
<b>TOTAL</b>	<b>\$282,290</b>	<b>\$141,145</b>	<b>\$70,573</b>	<b>\$70,573</b>

## **APPENDIX 5: GLOBAL GRANT APPLICATION FORM**

### **GLOBAL GRANT APPLICATION FORM**

All proposed D5180 Global Grants must first be submitted to the District Global Grants Chair before going to The Rotary Foundation and being entered into the Rotary International Grant Center. No DDF will be allocated to a Global Grant unless previously approved at the district level.

For a Global Grant where D5180 is the lead, and one of our clubs is sponsoring the Global Grant, the following must be submitted to the District Global Grants Chair:

1. Name of Club: \_\_\_\_\_
2. Name of Point of Contact (POC): \_\_\_\_\_
3. Names of Committee Members:
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_
4. Attachments:
  - a. Completed Community Assessment Form identifying need.
  - b. Overall project plan for meeting stated need
  - c. Proposed budget to meet the plan
  - d. Copy of completed TRF Memorandum of Understanding (MOU) and D5180 MOU Addendum
  - e. Certification that all Committee members and POC have been trained

For a Global Grant where D5180 is not the lead:

1. Name of Club: \_\_\_\_\_
2. Name of POC: \_\_\_\_\_
3. GG # & sponsoring district: \_\_\_\_\_
4. Estimated Amount of cash contribution: \_\_\_\_\_
5. Estimated Amount of DDF requested: \_\_\_\_\_

I CERTIFY THAT THE CLUB IS CURRENT ON ITS ANNUAL TAX RETURNS.

Club Approval: \_\_\_\_\_  
Club President's Signature

Grant Review Panel Recommendation:  
Approved \_\_\_\_\_ Disapproved \_\_\_\_\_

Comments:/Reason for Disapproval:

## APPENDIX 6 : DISTRICT GRANT APPLICATION FORM *for the Rotary Year 2023-2024*

ROTARY CLUB: \_\_\_\_\_ YEAR: \_\_\_\_\_

PROJECT TITLE: \_\_\_\_\_

AREA OF FOCUS: \_\_\_\_\_  
*Which of the 7 Rotary Area(s) of Focus goals are to be met?*

### TYPES OF PROJECTS ALLOWED FOR 2023-24

- Community projects
- Humanitarian projects
- Youth programs, including Rotary Youth Leadership Awakening (RYLA), Rotaract, Interact, & RYE
- Scholarships for any length of time, location or field of study

TOTAL REQUEST: \$ \_\_\_\_\_ *Not to exceed \$5000 and / or only up to 50% of budget as outlined on Page 3. Application will be reviewed by the District Grants Subcommittee for compliance with District policies, objectives, and will be dependent upon available funds.*

LIST ANY PARTNERING CLUBS AND SPECIFY DOLLAR AMOUNT REQUESTED BY EACH CLUB:

PRIMARY CONTACTS – MUST INCLUDE PRESIDENT ELECT AND *Point of Contact (POC)*  
QUALIFYING MEMBER

PRESIDENT ELECT: \_\_\_\_\_  
NAME

\_\_\_\_\_  
E-MAIL

\_\_\_\_\_  
TELEPHONE NUMBER

CLUB POC \_\_\_\_\_  
NAME

\_\_\_\_\_  
E-MAIL

\_\_\_\_\_  
TELEPHONE NUMBER

PRIMARY CLUB MAILING ADDRESS:

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*This is where the reimbursement check will be sent. Primary club is responsible for distribution of grant funds to partner clubs.*

DESCRIBE THE PROJECT:

*INCLUDE LOCATION, OBJECTIVES AND WHO WILL BENEFIT FROM THE PROJECT AND HOW THEY WILL BENEFIT. Attach further documentation if necessary.*

2. DESCRIBE THE NON-FINANCIAL PARTICIPATION BY ROTARIANS IN THE PROJECT. Again, *attach further documentation if necessary.*

- a.) Estimate number of club members who will participate and project work hours
- b.) Explain what your members will do, that is, examples of non-financial participation

3. HOW WILL THE GENERAL PUBLIC KNOW THIS IS A ROTARY SPONSORED PROJECT?

Provide details, e.g., publicity in newspaper, display of Rotary wheel, plaque, Social media, et. *And again, attach further documentation if necessary.*

#### 4. COOPERATING ORGANIZATION

If the project involves a cooperating organization, provide the name of the organization and attach a letter of participation from that organization that specifically states its responsibilities. Tell how that organization will interact with Rotary in the project. By signing this application, the Rotary sponsor endorses the organization as reputable, responsible and acting within the laws of the state.

#### 5. BUDGET

##### A SOURCES OF FUNDING:

*Only Qualified Rotary club's funds can be matched*

CLUB: \$ \_\_\_\_\_

PARTNERING CLUB(S): \$ \_\_\_\_\_

PARTNERING ORGANIZATION(S): \$ \_\_\_\_\_

DISTRICT GRANT MATCHING \$\$: \$ \_\_\_\_\_

TOTAL EXPECTED INCOME: \$ \_\_\_\_\_

##### B. ITEMIZED PROJECTION OF EXPENSES:

*District understands that items/expenses may change as project progresses. Save all receipts and file copies of receipts with final report. RECEIPTS DATED BEFORE YOUR OFFICIAL NOTIFICATION OF AWARD WILL NOT BE HONORED AS RECEIPTS FOR MATCHING GRANT DOLLARS. Don't proceed until notified that the Grant has been approved.*



APPLICATION IS DUE BY **May 26, 2023**.

AGAIN, RECEIPTS DATED BEFORE YOUR OFFICIAL NOTIFICATION OF AWARD WILL NOT BE HONORED AS RECEIPTS FOR MATCHING GRANT DOLLARS.

IT IS HIGHLY RECOMMENDED THAT ONE PERSON FROM THE PRIMARY CLUB BE RESPONSIBLE FOR THE COLLECTION OF ALL INVOICES AND RECEIPTS FOR PAYMENT AS THE PROJECT PROGRESSES. COPIES OF ALL ARE REQUIRED AS PART OF THE FINAL PROJECT REPORT.

Final project report for Grants in the 2023-2024 grant year must be filed with the District Grants Chair by **May 10, 2024**. File final report to [dcv@ssociatedsound.com](mailto:dcv@ssociatedsound.com)

I HEREBY CONFIRM THAT THE ROTARY CLUB OF \_\_\_\_\_ IS COMMITTED TO THE UNDERTAKING OF THIS PROJECT AS AN ACTIVITY OF THE CLUB IN ACCORDANCE WITH DISTRICT 5180 AND ROTARY INTERNATIONAL GUIDELNES.

I CERTIFY THAT THE CLUB IS CURRENT ON ITS ANNUAL TAX RETURNS.

CURRENT PRESIDENT: \_\_\_\_\_

PRESIDENT ELECT: \_\_\_\_\_

E-MAIL THIS APPLICATION By **May 26, 2023** TO:

DAVE VEDEN, District Grants Chair: [dcv@associatedsound.com](mailto:dcv@associatedsound.com)

Please Note: Final project report for Grants in the 2022-23 grant year must be filed with the District Grants Chair by **May 12, 2023**. File final report to [dcv@ssociatedsound.com](mailto:dcv@ssociatedsound.com).