

The
Rotary
Foundation



Grants Management Seminar



District 5495 The Rotary Foundation

Session 1

Introduction and District Grants



District 5495 The Rotary Foundation

The Rotary Foundation Mission

The mission of The Rotary Foundation of Rotary International is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.



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7 AREAS OF FOCUS



Peace and Conflict Resolution



Disease Prevention and Treatment



Water, Sanitation and Hygiene



Maternal and Child Health



Basic Education and Literacy



Economic and Community Development



Supporting the Environment



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Rotary Foundation – Programs

☐ *Project Grants*

Funding for Club Projects:

- ❖ *Global Grants*
- ❖ *District Grants*
- ❖ *Scholarships*
- ❖ *Vocational Training Teams*

☐ *Polio Eradication*

☐ *Rotary Peace Centers*

☐ *Disaster Response*

☐ *Programs of Scale*



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SCHOLARSHIPS

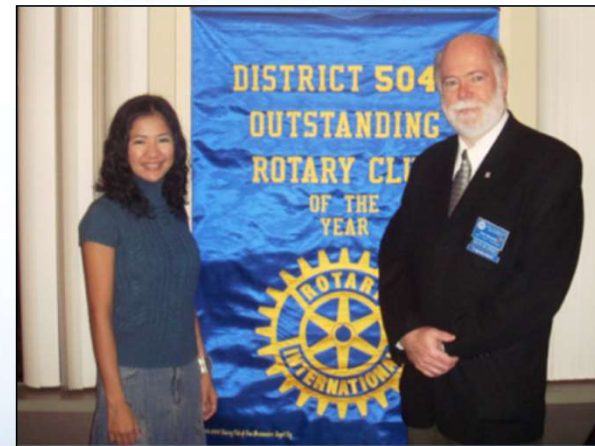
Scholarships can be funded by:

- *Global Grants*

Larger \$\$ but have specific requirements

- *District Grants*

Smaller \$\$ but more flexible



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Disaster Response Grants

Disaster response grants support relief and recovery efforts in areas that have been affected by natural disasters within the past six months.

Grants of up to US \$25,000 are awarded by The Rotary Foundation to districts located in the affected area only. The funds can be used to provide basic items such as water, food, medicine, and clothing.

Districts apply for the grants, manage the funds, and submit reports explaining how the funds were used. Clubs within the district can participate in implementing grant-funded activities.



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VOCATIONAL TRAINING TEAMS

Traveling Teams of Professionals:

- *Learn about their vocation Or Teach other professionals about their vocation.*
- *Can be funded through either by District or Global Grants (requirements differ).*



Programs of Scale Grants

Every year, The Rotary Foundation awards a \$2 million grant to one project that aligns with one or more of Rotary's areas of focus. The grant will support project activities for three to five years.



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Types of GRANTS

Today We are Focusing On:

District Grants

Administered by the District Foundation Committee

➤ *Tom McLarty*

Global Grants

Administered by The Rotary Foundation Staff

➤ *Dale Gray*



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DISTRICT GRANT ACTIVITIES

- *Must include active Rotarian participation*
- *Adhere to stewardship guidelines*
- *Clubs Apply through the District*
- *Must Align with the Foundation's mission*



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How are Grants Funded?

Grant Funding =

- Club \$
 - Individual \$
 - Rotary Foundation (TRF) \$
-
- Grants are provided as a conditional “match” to cash contributions.



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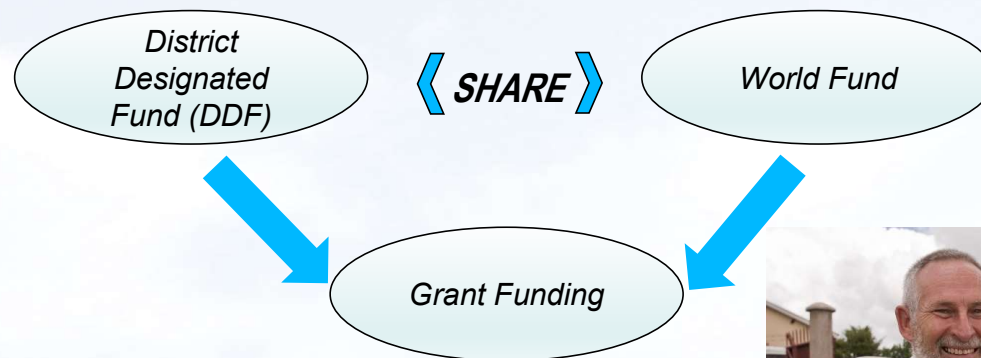
Two sources of TRF \$ for Grants

- District Designated Fund (DDF)
Controlled and distributed by
D5495 Foundation Committee
- World Fund
Controlled and distributed by
TRF Trustees



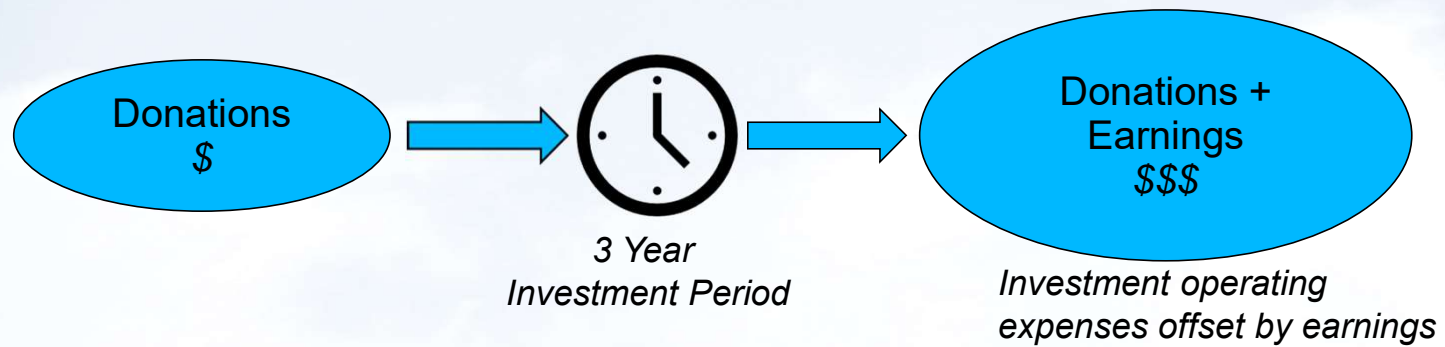
Grant Funding and “Share”

- Local and international GRANTS are funded through the SHARE system:



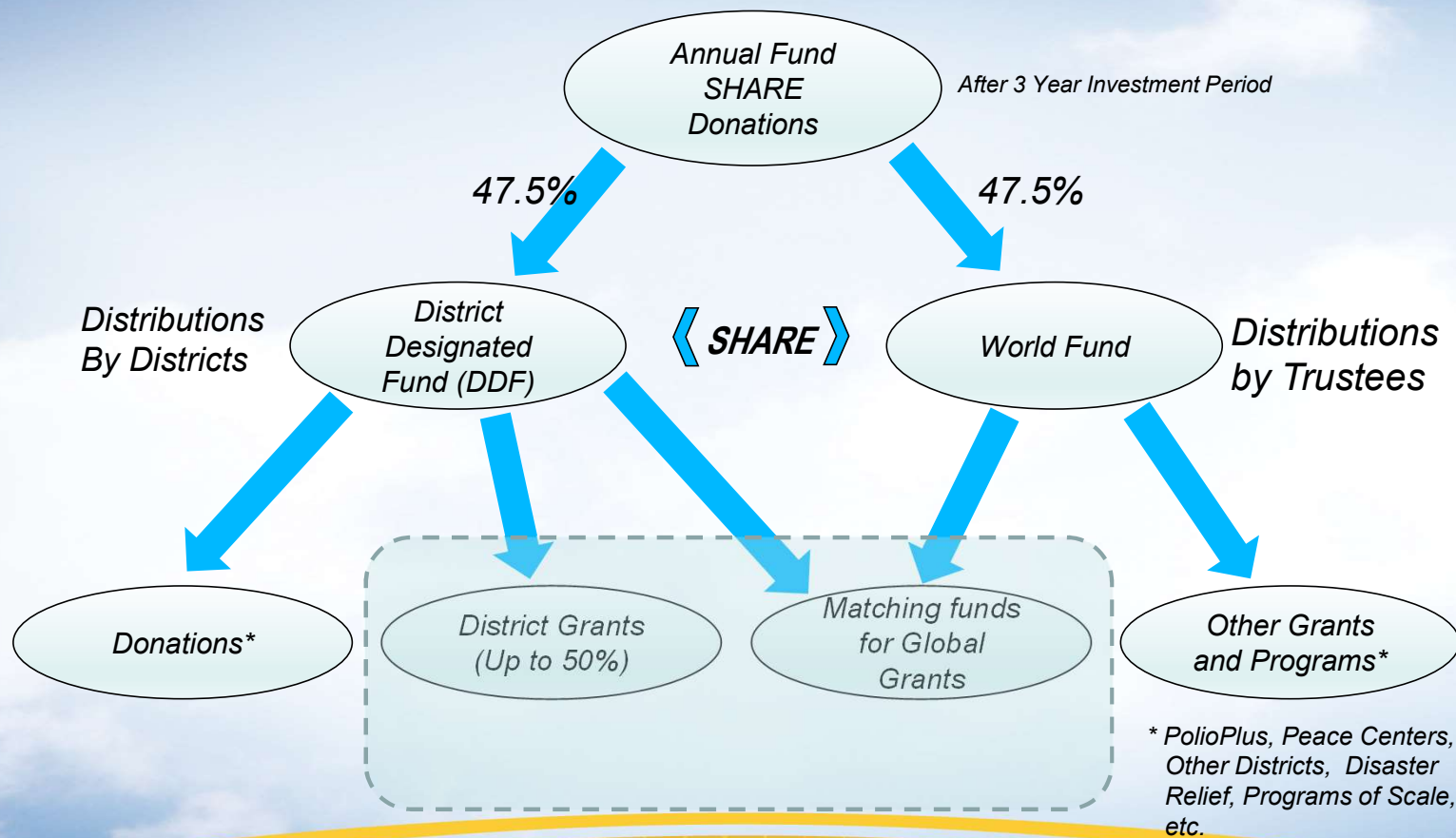
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SHARE SYSTEM



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SHARE SYSTEM



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How Can My Club Qualify for Grants?

1. TRAINING

**2. ACCEPTANCE of
SEWARDSHIP**

3. GIVING



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Requirement One: TRAINING

Two club members must attend
Grant Management Seminar

Recommended:

1. Club President Elect
2. Club Rotary Foundation Chair



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Requirement Two: STEWARDSHIP

Stewardship is the responsible management and oversight of grant funds, including:

- Standard business practices
- Rotarian supervision
- Financial records review
- Oversight of funds
- Reporting of irregularities
- Timely submission of reports



Acceptance of Stewardship:

A signed Memorandum of Understanding (M.O.U.)

1. Club Qualification Management Plan
2. Bank Account Requirements
3. Club Officer Responsibilities
4. Financial Report on Use of Grant Funds
5. Document Retention
6. Report of Misuse of Grant Funds
7. District 5495 Addendum

***Required by
Rotary International***



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MOU – Club Qualification

- A. Upon successful completion of the qualification requirements, the club will be **qualified for one Rotary year**.
- B. The club **must comply** with MOU, 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.
- E. The club must **cooperate with** any financial, grant, or operational **audits**.



MOU – 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**.



Conflict of Interest

- Any potential conflict of interest must be **reported to TRF and District Foundation Committee.**

Potential Conflicts of Interest:

- Exists when a Rotarian benefits financially or personally from a grant.
- Benefit can be direct (the Rotarian benefits) or indirect (an associate of the Rotarian benefits).



MOU – 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.

* A template club financial management plan is available from the District.



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MOU – Bank Account Requirements

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

The club bank account must:

- A. Have a minimum of two Rotarian signatories.
- B. Be a low- or noninterest-bearing account
- C. Interest earned must be documented and used for eligible expenses.
- D. A separate account should be opened for each club-sponsored grant.
- E. Grant funds may not be deposited in investment accounts.
- F. Bank statements must be made available.
- G. The club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.



MOU – 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.

Reports inform TRF of the grant's progress and how funds are spent.



MOU – Document Retention

The club must establish and maintain appropriate recordkeeping systems to preserve important documents and support transparency.

A. Documents that must be maintained include, but are not limited to:

- Bank information, including copies of past statements
- Club qualification documents including a copy of the signed club MOU
- Documented plans and procedures, including:
 - Financial management plan
 - Procedure for storing documents and archives
 - Succession plan for bank account signatories and retention of information and documentation
 - Information related to grants, including receipts and invoices for all purchases

B. Club records must be accessible and available the club and district.

C. Documents must be maintained for a minimum of five years.



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MOU –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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District Addendum to M.O.U.

1. Appoint a Club Rotary Foundation Chair to a 3-year term.
2. Have at least two members attend the District Foundation Grants Seminar annually.
3. Be current on its RI and District dues, and in good standing with the District, Rotary International, and The Rotary Foundation.
4. Be current on all required tax returns for the Rotary Club and any associated Club Foundation.
5. Have established and reported an annual giving goal to the District Foundation Chair for the current year and for the next year (Rotary Club Central).
6. Have contributed to the Rotary Foundation Annual Giving Fund in the previous year or the current year.
7. Have, by January 1st of each year, reported its Club President-Elect to the District and to Rotary International.
8. Be current on all Rotary Foundation Grant reports.



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Important "Must Reads"

- "Grants Terms and Conditions"
- "District Grant Guidelines"
- "Guide to Global Grants"
- "MOU and District Addendum"

All on the District 5495 website



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District Grants

How to Apply



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DISTRICT GRANTS



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FEATURES OF A DISTRICT GRANT

A single block grant from TRF, awarded annually to the District for club and district projects.



- *TRF Funds distributed by the District (guidelines vary by District)*
- *Local or international activities*
- *Local decision making with flexible guidelines*
- *Smaller, shorter term activities and projects*



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DISTRICT GRANT ACTIVITIES

- *Must include active Rotarian participation*
- *Adhere to stewardship guidelines*
- *Clubs Apply through the District*
- *Must Align with the Foundation's mission*



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DISTRICT GRANTS; Design and Planning

Everything you need to know..

...is in 2025-26 District Grants
Guidelines (Download from
rotary5495.org)



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DISTRICT GRANTS; Design and Planning

Financial

- District will match Club funds 2:1
- Maximum DDF awarded for single club request is \$2500
- Match varies from year to year depending on DDF available.



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DISTRICT GRANTS; Design and Planning

Financial

- District will match Club funds 2:1
- To obtain the maximum match, the minimum club contribution is \$1250



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DISTRICT GRANTS; Design and Planning

- Two-Tiered District match based on giving
 - \$1000 Maximum for clubs which have given something in 2023-24 or 2024-25
 - \$2500 Maximum for clubs which have given \$100 or more per capita (average giving).



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DISTRICT GRANTS APPLICATION

District 5495 Website

Foundation tab

District Grants tab

Apply for a grant

Rotary Grants Website

*Step-by-step instructions are in
the Guidelines document*



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Rotary Grants Website

[Global Grants](#) | [District Grants](#) | [Legacy Matching Grants](#) | [Help](#) | [About This Site](#) | [Contact Us](#)

Welcome to the Rotary Grants Website!

Select one of the Website Sections

Global Grants



Global Grants

District Grants



District Grants

**Legacy
Matching
Grants**



Legacy Matching Grants

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Welcome to the Rotary District Grants Website

Look below for a list of project. Use the **search feature** to find a specific project.
Click on **My Account** to login and see your own projects.

P-

Rotary Year
2021-22 ▾

List of Projects - 2021-22

#	Title	Country	Location	District	Club	Amount	Status
P-3717	Drinking Water in Schools	India	Bhadrak, India	5790	Lewisville	\$30,000	Fully Pledged

1 project, \$30,000 total budget

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Rotary District Grants

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Submit a Project

Please read carefully before submitting a project.

Projects on this website are usually submitted by a Rotarian from the project primary club.

You can submit a new project to be published on this website. You should do so if you want to go through your district approval process. Your project will be included in the [Main List](#) and anybody can review the project description. You will be notified by email when your project has moved to the next level in the approval process, or when you are requested to do something.

When submitting a new project, make sure you include a complete description. Only projects with a detailed description will be accepted on this site. Give us an email address that you check very often, as this is the only way you will be notified when changes are made to your project. You can submit pictures and other supporting documents to describe your project.

Before you begin, please be familiar with the [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#).

[>> Submit a New Project <<](#)

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Your Information

This must be **YOUR name and YOUR email address** if you are not the primary contact for this project, otherwise you will not be granted access to the project administration

Your Name

Your Email

Submit a New Project

Project Title

Rotary Year

Country

Location

Areas of Focus (Check all that apply, if any)

- | | |
|--|---|
| <input type="checkbox"/> Peacebuilding and conflict prevention | <input type="checkbox"/> Disease prevention and treatment |
| <input type="checkbox"/> Water, sanitation and hygiene | <input type="checkbox"/> Maternal and child health |
| <input type="checkbox"/> Basic education and literacy | <input type="checkbox"/> Community economic development |

Activity Type

Project Summary: Short sentence to explain the project. This project description should provide information about what activity is being funded, who is benefiting from the activity, and the name of the location of the project or activity, including the city or country. For example, "Five computers provided to schools for children in Addis Ababa, Ethiopia."

Project Description: You should include what needs have been identified, how the project will meet those needs, and the timeline for your project. Please specify what the project funds will be used for and how club members will be involved.

Project Contact Person

District Number

Rotary Club of

Contact Name

Email

Project Budget

Total Budget

Club Contribution

District Contribution (DDF)

Payment Information

This is the information to provide to your District Leadership to send the check payment after the project is approved.

Contact Phone Number

Make checks payable to

Address

City

State

Zip

☐ **Check this box** to certify that this project fits within the guidelines of the Rotary Foundation Mission Statement:
The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

Cancel

Reset

Save



DISTRICT GRANTS; Application

Project Description:

- *List the Rotary Clubs involved in the project if it is a joint club project.*
- *Include a concise description of the project objectives including how the project will benefit the community and/or improve lives.*
- *Describe specific Rotarian activities.*
- *Describe how the public will know this is a Rotary-Sponsored project.*
- *If the project involves a cooperating organization, provide the name(s) of the organization(s).*



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P-3721

Example Project

[Administration](#)



Description

Financing

Documents

Photos

History Logs

Project Description

Country: USA

Location: Yarnell

Total Budget: \$3,750

Area of Focus: Peacebuilding and conflict prevention

Activity Type: Food/Agriculture: Volunteer Services

Summary: Meals on wheels

Etcetera

Project Contact Person

District: 5495

Rotary Club of: Peoria North

Primary Contact: Rebecca Wilks

Email: info@drwilks.com

Project Status

Awaiting Review

This project is "**Proposed**". This project needs to be reviewed by the website administrator to validate its content.

Need to raise: \$0

Project listed for the 2021-22 Rotary Year.

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Rotary District Grants Website Login

Your email address is used as a username.

Email Address:

Password:

Login

An account will be created automatically the first time you submit a project, or pledge support to a project, or when you are granted a role in your district. You do not need an account to search the projects on the website. The account is only needed to administer the projects you participate in, and gives you easy access to your list of projects.

Forgot Your Password?

If you forgot your password we can send it to you by email.
Enter your email address and click "Forgot Password".

Email Address:

Forgot Password

For additional support, please send email to administrator@matchinggrants.org. We will be happy to assist you.

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P-3721

Example Project

[Back to Project](#)

[Description](#)

[Financing](#)

[Documents](#)

[Photos](#)

[History Logs](#)

Update Project Information

Click the button on the right to make changes to the basic project information.

[Edit Project Page](#)

Project Status Information

Your project is **"Proposed"**. Your project needs to be reviewed by the website administrator to validate its content. You will be notified by email when your project is published. In the meantime you can use these administrative pages to add some content for your project description.

You are logged in as: Rebecca Wilks, info@drwilks.com -- [Logout](#)

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P-3721

Example Project

[Back to Project](#)

Description

Financing

Documents

Photos

History Logs

Upload Project Documents



Documents to upload on this site must be in PDF format. You can generate PDF documents using the paid version of Adobe Acrobat. [Click here](#) to find out more about PDF documents. If you do not have the paid version of Adobe Acrobat and do not want to purchase it, there are some free utilities to generate PDF documents. [Click here](#) to download one of these utilities.

Select the PDF File to upload
by clicking the "Browse" button,
enter a document name, and click "Upload". **This must
be a PDF document.**

Name:

No file selected.

☐ **Restricted Access**

Restricted documents can only be accessed by the project
partners. **Make a document restricted if it contains sensitive
information.**

You are logged in as: Rebecca Wilks, [info@drwilks.com](#) -- [Logout](#)

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P-3721

Example Project

[Back to Project](#)

Description

Financing

Documents

Photos

History Logs

History Log / Email Communication

History log entries are added in the "History Logs" tab of the project page. They cannot be changed after submission. A notification email is sent to all parties to notify them of the new entry.

Date: 29 Dec 2020

Text of the history log entry to add on the web page:

Please, only submit history log entries for significant information about the project status, this is not a field for comments. (800 characters left)

To: info@drwilks.com

Text to add to the notification email (will not be added to the web page):

[Save History Log/Send Email](#)

Add People to the Distribution List / Give Administrative Access

All notification email for History Log entries and Email Communications are sent to the **distribution list in green above**. If you wish to add a new contact person for this project please enter the name and email address below and click on "Add". This new contact person will have full access to this project administration pages unless you uncheck the box below.

Name: Email: [Add](#)

☒ Administrative Access

☒ Email Distribution List

Administrative Access allows the user to make changes to the project, upload documents and photos, and enter history log entries.
Email Distribution List allows the user to view restricted documents, and to receive the notification emails for the project.

Remove from the Distribution List / Revoke Administrative Access

If somebody withdrew from the project and no longer wish to receive the notification emails, please select the email address below and click on "Remove". This address will be removed from the distribution lists for all future notification emails. If you are included in the **list in green above** and cannot select your address below to be removed, it means you are the project contact and your email address needs to be removed from there, by editing the project page.

Rebecca Wilks <info@drwilks.com> (Admin+Email) [Remove](#)



DISTRICT GRANTS; Application

Application is complete when:

- Online application is correctly completed and signed
- Club is qualified



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DISTRICT GRANTS; Application

Second and third applications:

- Will be funded if possible
- Identify your club's first priority project in the application.



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DISTRICT GRANTS: TIMELINE

- Applications due:
 - **May 31, 2025**
- The committee meets and submits the “Spending plan” to TRF before:
 - **June 30, 2025**
- Money should arrive in
 - **July 2025**
- Project *final report* due:
 - **April 30, 2026**



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DISTRICT GRANT : Final Report

- All projects must be completed and reported by **April 30, 2026**
- Report form is available on the District website
- Upload in PDF format to the project page:
 - A completed and signed **final report form**
 - Copies of all “**paid**” receipts
 - Project photos (preferred, not required)



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DISTRICT GRANT : Troubleshooting

- Deadlines
 - Application
 - Previous reports
- Guidelines
- Qualification
 - MOU
 - Giving
 - training
- Project start and end dates
- Pay attention to website emails



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Questions?



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