Rotary District 5610 Grants

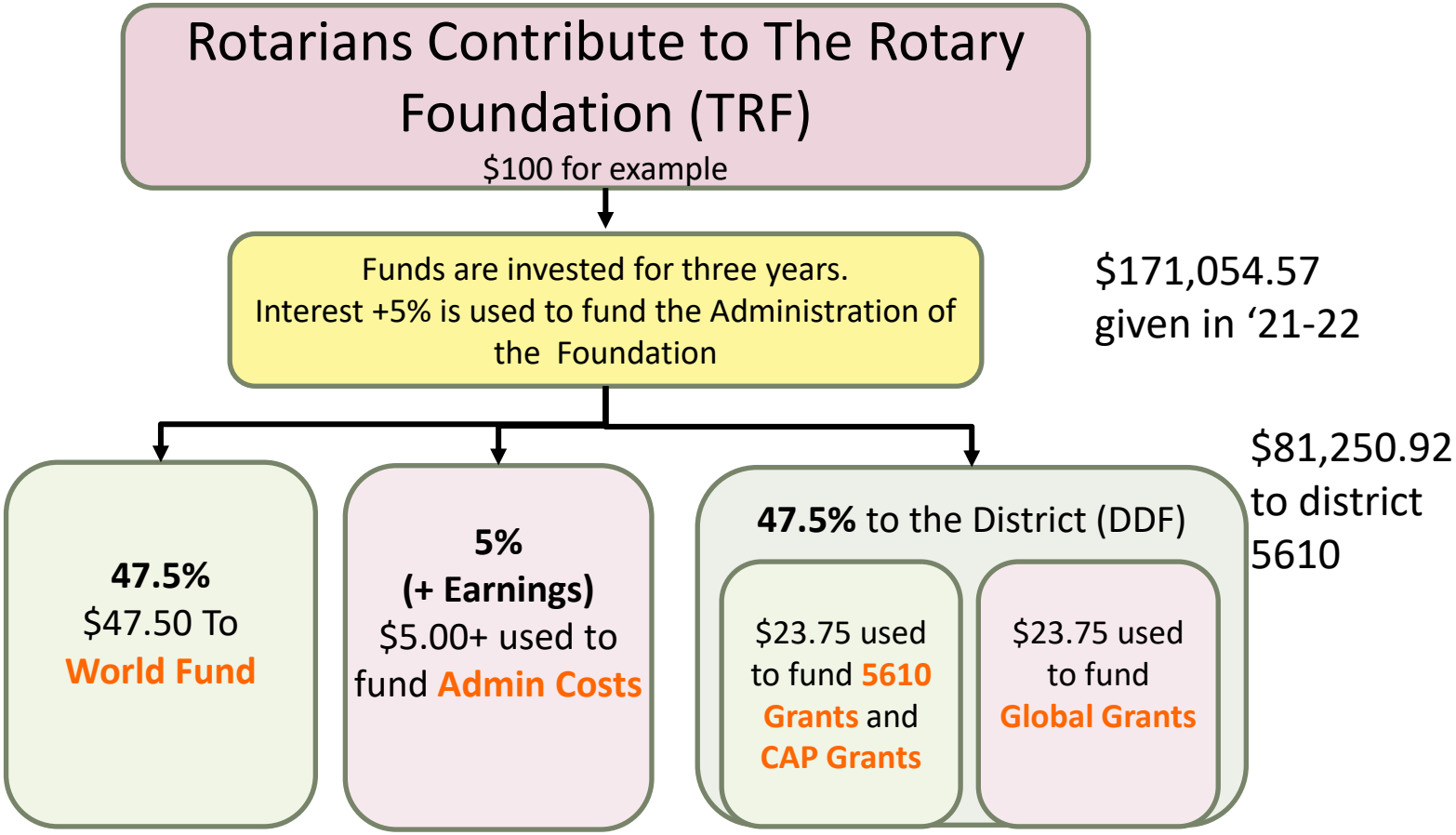
Rotary Year 2024-25

Brad Blaha
District 5610 Grant Subcommittee Chair

Welcome

- Roll Call
    - How many are new to grants?
- Agenda
    - Some info on grants
    - Instructions and qualifications
    - Reports and Timelines
    - Walk Through Grant Application

Money Comes from TRF Donations Returned to the District



Approximately $40,625 available for District Grants for FY 24-25

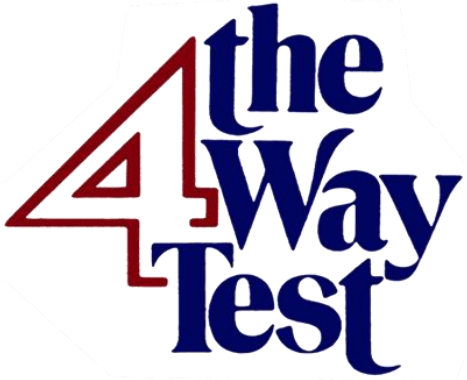
TRF Grant Eligibility Guidelines

- Must align with the mission of The Rotary Foundation
- Must include active participation of Rotarians
- Adhere to all applicable laws
- Cannot fund expenses incurred before approval
- Comply with all Rotary International rules and policies
  - Including Conflict of Interest, Privacy, and Trademark Usage Policies, Protect the safety and well being of minors who participate
- Include signage identifying Rotary (not to exceed $1,000)
- Grant funds may NOT be used for:
  - Fund-raising, purchase of land/buildings, PR for Rotary
  - Unrestricted cash donations to other organizations
  - Operating, administrative, or indirect program expenses of other orgs.

Rotary

** Partial List
Summarized from The Rotary Foundation's
"TERMS AND CONDITIONS FOR ROTARY FOUNDATION DISTRICT GRANTS AND GLOBAL GRANTS" :
https://rotary7090.org/documents/en-ca/be763a56-a4f7-4cb2-8fd4-04ae3f7c102d/1/

Rules from RI and District



- Remember the Four-Way Test
  - No discrimination
- Must be a new project for your club
  - Sustainable without district funds
- Must be a club-driven project
  - No check passing
  - Can be for purchasing and donating equipment
- **CANNOT** start project until grant check is received – Likely Mid-September
- 50/50 match district to club/participating organizations (many are less than 50/50 DDF) Example of musical instruments in park - club, district, arts council, and city
- $10,000 is the limit for district grants.

Rotary

District Grant Timeline 2024

- Grant application is posted on 5610 website
- Training – May 8th @ 3:30 pm via Zoom
- Applications accepted until July 31- **This is a hard deadline!**
- Committee meets to make allocations – before Aug 15
- TRF will probably allow entry of our grant to Grant Central around Aug 15
- TRF approves our expenditure plan by Sept 1 – check is sent to District Treasurer – early September
- Max 2-year duration to complete grant project AND FILE REPORT/RECEIPTS
  - Often much shorter
  - Can even be a 1-day project

Rotary

Club Qualification – EVERY YEAR!

1. Signed MOU – must be new every year (club takes responsibility)
   - Download from district website
   - President and president-elect must sign (you will need a President elect!), then scan as pdf and send to Rotary5610grants@gmail.com
   - Need a separate grants bank account
2. At least 1 club member attend grant training or watch video and pass quiz
3. Proof of IRS 990 filing
4. Current on reporting for past grants
5. Current on district and RI dues
6. Have a foundation giving goal entered into Rotary Club Central on my.rotary.org
7. Turn in on or before deadline of July 31st

Rotary

Clubs may write a grant application, but it will not be considered without these 7

Your Grant

Rotary

Formulate the idea of a grant, then act!

- Identify need and potential partners
- Initial planning and budgeting for selected need/project
- Complete project planning & document project – then submit project on the Google Form grant application
- Make sure your past district grant reports/receipts are up to date by July 31
- Make sure your club goals are entered into Club Runner
- Get final approval from district and receive check - September
- Execute project (cannot start before check!)
- Finish project within 2 years
- Submit a final report or submit a project update (May 2025).
  - Final Project Report is done via electronic form (If project completed)
  - If continuing on, email rotary5610grants@gmail.com a progress report.
- Follow-up after completion as appropriate

Rotary

What you need for the Google Form application

Consider doing this in a Word document, then cutting and pasting!!

1. Lead Rotary Club (type in the name of YOUR club)
2. Other Rotary Clubs participating in the project (list the club name or put "N/A")
3. Project Title (a short descriptive title of what you want to do, like "Bike Helmets" or "Pollinator Garden")
4. Brief Project Summary (later in the application, you can give a longer explanation of the project. Here you should put a summary such as "Working with city officials and the school district, our club will help build a playground adjacent to the elementary school for children to enjoy with their families. This project is in keeping with our club's dedication to serving education and youth projects in the community.)
5. Amount requesting (this is the amount you are requesting from the district).
6. Minimum amount acceptable (when considering all the grants, the committee may not have enough money to fund all projects at the level requested. If it is possible for you to complete the project for a smaller amount of district funds, put that amount here. If you must have the requested amount, please repeat that number from question 5)

Rotary

What you need for the Google Form application - 2

7. Area of Focus. (there are check boxes for the seven areas of focus that RI emphasizes – Peace & Conflict Resolution, Basic Education & Literacy, Disease Prevention & Treatment, Economic & Community Development, Water & Sanitation, Maternal & Child Health, and Supporting the Environment. Put a check mark for all the boxes that apply, but only one box is acceptable)
8. Project Description. (this is a long answer description – what are you doing, where, who's involved, how will you improve lives, how is this SUSTAINABLE. All these should be included in the description. Sustainability is important for many projects. For example, "we're going to install playground equipment that will be maintained by the school district in future years."
9. Estimated start date (remember, the project cannot start until approved by RI – probably one month after deadline)
10. Estimated completion date (must be completed in 2 years)

Rotary

What you need for the Google Form application - 3

11. Non-financial participation (explain how Rotarians will be involved in the project besides funding. Remember, we don't just hand over a check on projects. Rotarians must be involved. "We will/are involved in meetings to plan the playground design and will be participate in the installation of the equipment, along with professional staff.")
12. Public Awareness (how will the general public know this is a Rotary-sponsored project? News releases, a permanent sign on the site - can be budgeted up to $1,000 – are just two examples)
13. Project Contacts. (Please provide 2 people from YOUR club who will be responsible for the project – name, Rotary Position, address, telephone and email are REQUIRED here. Also the same information must be provided for the person to whom the grant check will be sent.)
14. Cooperating Organizations. (please list the other organizations involved, if any)

Rotary

Google Form Application – the Budget

15. Income (indicate how much you are seeking from the district, how much the club will provide, and how much from other organizations/sources, if any. Total the amount). Your club and partner organizations must provide 50% of total funds required for the project.

16. Expenses (be as precise as possible and then add the total amount. THE TOTAL EXPENSES MUST EQUAL THE TOTAL INCOME for the project). UPLOAD RECEIPTS.

17. Type in the names of two people from the club who will be responsible for the project and how the funds are expended. By submitting this application, these people are accepting responsibility for the project and funds.

18. Upload Signed MOU from your club and most recent for 990. Please name file for your club example Brookings990, Brookings MOU

The budget format will be the same on the final report!

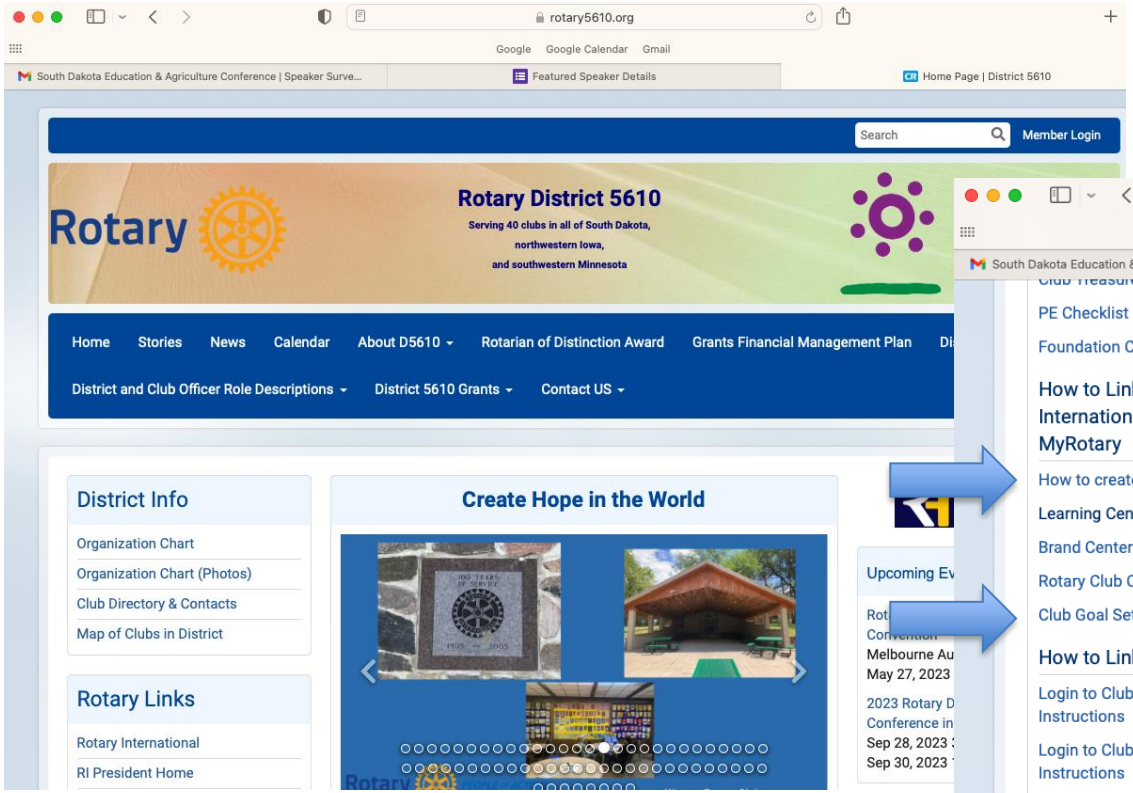
Rotary

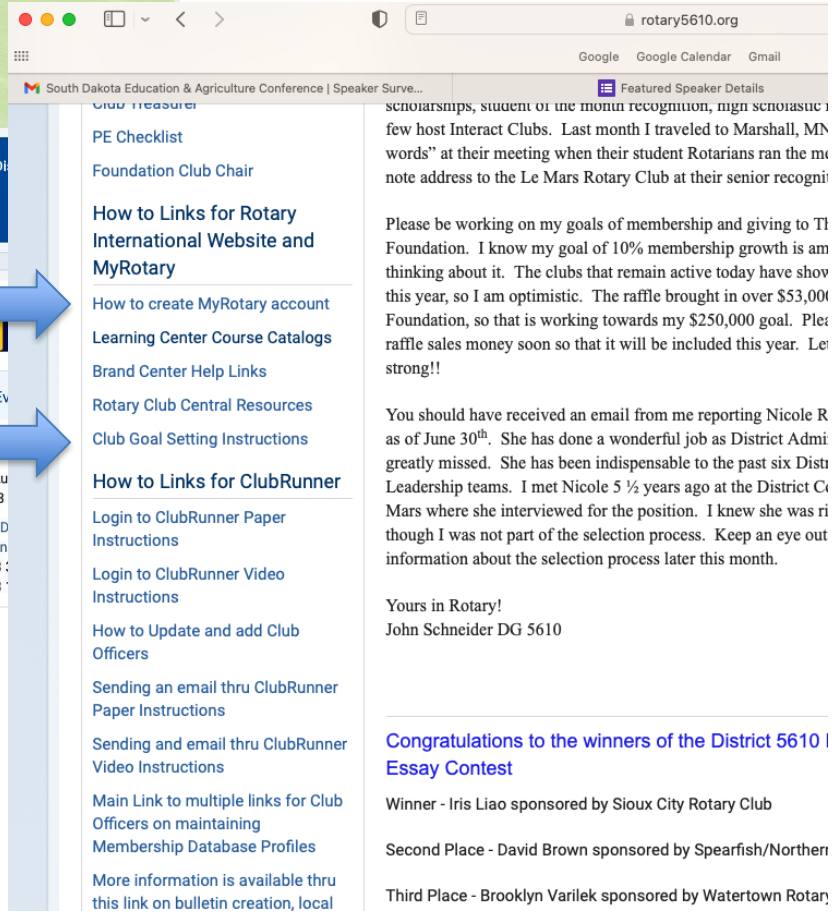
Some final thoughts…

- District grant awards are decided by DG Bruce Nearhood, DRF Chair Bert Olson, and DGSC Brad
  - Must have all the information complete (MOU, 990, application, past grants done, goals entered)
  - We total all requests
  - We consider the number of people impacted by the grant – “bang for the buck” – but not the final decision
  - We consider total cost benefit compared to district contribution
    - Example of musical instruments: $5,000 club, $5,000 district, $10,000 arts council, $7,500 city to install and guarantee future maintenance/insurance
    - District paid $5,000 for a $27,500 project = committee said ”good ROI”
- Receipts and final reports are critical

Rotary

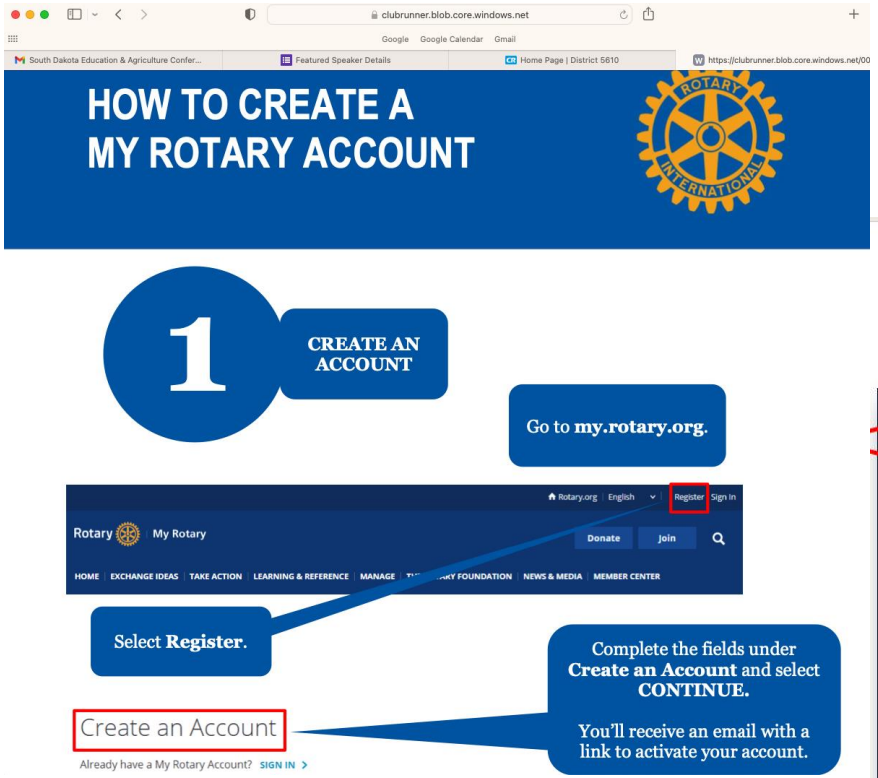
About entering your goals…
Use your "My Rotary" account

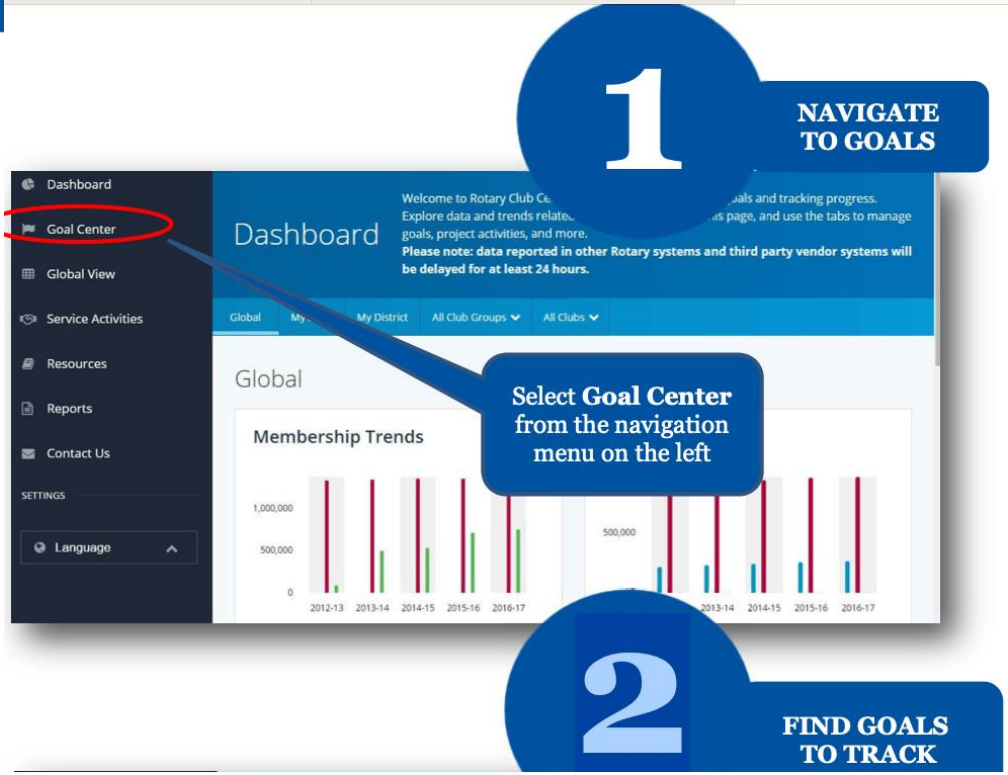




Rotary

Entering Goals….





Rotary

Thanks for Attending

- Questions? Email: rotary5610grants@gmail or call me @ 507-456-2482
- See the chat for a link to take the Rotary Grants Quiz, you must pass this with 100% to qualify.

Rotary