

Rotary District 5870 District Grant Policy Rotary Year 2023-24

1. District 5870 intends to apply for a District Grant for Rotary Year 2022-23 in the amount of **\$131,210**. The planned allocation of these funds will provide:

- a. Club DAP Grant Projects = **\$100,010**
- b. CTES Scholarships (7) = **\$15,000**
- c. District Service Project = **\$15,000**
- d. Unexpected Projects = **\$1,200**

2. Club Qualification: To receive DAP Grant and/or Vocational Scholarship funding your club must be qualified. For a club to be qualified it must complete the following:

a. Submit the Memorandum of Understanding (MOU):

- 1) Two members of the club (one of whom is the incoming president) must sign the MOU if the club has a District Vocational Scholar, or
- 2) One member must sign the MOU (the incoming president) if you are only going to apply for a DAP Grant.

b. Attend Grant Management Training:

- 1) Two members (one of whom is the incoming president) must attend a Grant Management Training Seminar (GMTS).
- 2) The following GMTS sessions have been scheduled:
 - a) **January 14, 2023** (Virtual via Zoom) – both sessions (1-hour refresher and full 3-hour)
 - b) **February 26, 2023** (at Lone Star P.E.T.S.) – 3-hour session only
 - c) **March 18, 2023** (Virtual via Zoom) – both sessions
 - d) **April 15, 2022** (at the District Assembly) – 1-hour refresher only

Note: *Grant Management Training is an annual requirement. If a member attended training in 2022, he or she is eligible to attend the 1-hour refresher class in 2022. If not, that person must attend the full 3-hour class.*

c. Pay both RI and District Dues: The club must be current on all RI and District Dues at the time the funds are disbursed.

- d. Submit IRS Form 990: The club must demonstrate fiscal responsibility by presenting proof that they filed an income tax return for the Rotary Year ending **June 30, 2022** as required by the U.S. Internal Revenue Service.
- e. Grant Reporting: The club must be current on all TRF grant reporting, and must have closed any open DAP Grant it has received before it is eligible to apply for another district grant. Timely reporting and good stewardship of previous grants will be considered in determining your club's DAP Grant award.
- f. Set Annual Fund and PolioPlus Fundraising Goals: The club must establish attainable and challenging Annual Fund and PolioPlus goals and enter them into Rotary Club Central.

3. **District Assistance Program (DAP) Grants.**

- a. Pre-authorized funding for your club's DAP Grant project will be based on your club's Annual Fund (AF) giving, both per capita (primary) and total (secondary), in Rotary Year 2019-20. This pre-authorized amount will be distributed to your club's president-elect at Pre-P.E.T.S. on **February 11, 2023**.
- b. Your club must submit a DAP Grant Request Form to the District Grants Coordinator not later than **April 1, 2023** (the date of the District Assembly) – we realize that this is prior to Rotary Year 2022-23 and that it may take coordination between the incoming and outgoing Club boards of directors. A copy of this form will be distributed to club Presidents-elect at Pre-P.E.T.S., and will be posted on the District website, along with submission instructions, not later than **February 12, 2023**.
- c. Your club may request more than your pre-authorized allocation. If funding is available, the District Grants Subcommittee will base the award of additional funds upon the following criteria:
 - 1) Your club must commit to becoming a **100% EREY Giving Club** not later than **June 30, 2023**. A 100% EREY Giving Club is defined as a club where 100% of its active members have contributed a minimum of \$25 to the **Annual Fund** and the club as a whole has achieved a per capita of \$100 or more. *Your club's Annual Fund goal, as recorded in Rotary Club Central, **must** reflect this commitment.*
 - 2) Requests for additional funding will be considered in descending **5-year Annual Fund per capita giving average** sequence for the period 2016-21; i.e., the club with the highest 5-year average will be considered first and so forth.
- d. If for any reason your DAP Grant request is not received before the District Grant application is submitted to The Rotary Foundation for funding on or about **June 1, 2023**, your club's DAP Grant funding, if its approved, will be limited to a maximum of your pre-authorized allocation. The amount you are actually allocated will depend upon (1) how many other clubs also missed

the deadline and (2) how much contingency funding was requested in the District Grant application.

- e. There is a limit of **one** club-initiated DAP Grant per club per year. However, to expand the impact of their projects, clubs are encouraged to consider partnering with other clubs in a single, joint project that can be larger, have a broader and more lasting impact and include more Rotarians from the District.
 - 1) Participation in a joint project will count as a project for each of the partners.
 - 2) The sum of the partner's AF giving and their average per capita will be considered when allocating district grant funds.
 - 3) DAP Grant partner clubs must designate one club to act as the **Primary Partner** to receive the project funding and to be responsible for completing the required project report(s).
 - 4) The Primary Partner is responsible for completing a **District 5870 Club Partnership Agreement Form** to document the cash contribution that each partner club will be contributing to the project.
- f. Clubs are also encouraged to partner with outside, third-party (cooperating) organizations to expand the impact of the projects. However, all projects funded by a district grant must be proposed, managed and directed by Rotarians.

NOTE: If the cooperating organization is going to provide in excess of 50% of the funding, the primary partner will be required to submit a letter from that cooperating organization evidencing their financial commitment to the project.

- g. The District Grants Subcommittee will meet to approve your club's DAP Grant allocation no later than **May 20, 2023**, and will provide the approved funding amount, along with a copy of the **DAP Grant Application Form**, to you on or about **June 1, 2023**.
- h. The **DAP Grant Application Form** must be submitted to the District Grants Coordinator not later than **August 31, 2023**. Applications received after this date may be returned without action.
- i. **DAP Grant Applications** will be reviewed on a rolling basis (starting with the first application received) using the following criteria (subject to review and amendment throughout the year):
 - 1) DAP Grants are intended to support **short-term, local humanitarian or service projects** that:
 - a) Support the mission of The Rotary Foundation – “**improve health, support education, and alleviate poverty**”.
 - b) Involve the **hands-on, active participation of Rotarians**.

c) Are **Rotarian-led** and **identified as such**.

NOTE: *Each DAP Grant application must clearly demonstrate that it addresses all three of these objectives.*

- 2) DAP Grant projects are not required to be sustainable, and are not required to be in one of TRF's seven Areas of Focus (AOF).
- 3) All activities associated with a DAP Grant must be verifiable and auditable.
- 4) Projects must not directly benefit Rotarians; Honorary Rotarians, employees of a club, district, or other Rotary entity, or of Rotary international; a spouse, lineal descendent, spouse of a lineal descendant, or an ancestor of any living Rotarian or Rotary employee; or employees of agencies, organizations, or institutions partnering with TRF or Rotary International.
- 5) Project funds cannot be used to fund:
 - a) Cash contributions to a benefitting organization without receiving prior, written approval from the District Grants Coordinator.
 - b) Travel, salaries, or other administrative overhead costs.
 - c) Activities primarily sponsored by another organization or fund operational expenses of another organization
 - d) Existing or ongoing projects. This does not prevent the replication of successful projects that will benefit additional communities.
 - e) The purchase land or buildings or to construct or renovate a building. Funds must be used in compliance with the Foundation's policies on construction and renovation.
 - f) Reimbursement for projects already initiated or completed.
- 6) Projects must not involve liability on the part of District 5870, Rotary International or its Foundation beyond the amount of the grant.
- 7) Project sponsors must agree to work within the Trustee-established Stewardship Guidelines and utilize the financial guidelines and regulations for Humanitarian Grant Projects.
- 8) Clubs applying for a DAP Grant must identify two Rotarians who will provide oversight and management of awarded funds and who will serve as contacts for District 5870. **Both of these individuals must be current with Grant Management Training.**

- j. DAP Grant projects should **not** be initiated until (1) they are approved by the District Grants Subcommittee and (2) you have received your district funding. If you choose to start work on the project before receiving your district funding, understand that your club does so **at its own risk**. If, for any reason, either TRF or District 5870 denies your grant funding, your club will assume full financial liability for the project.

NOTE: You **cannot** use DAP Grant funding for any purpose other than the one that was described by you in your approved grant application. If you want or need to make changes to the project you **must** receive permission to do so from the District Grant Coordinator **before** you make those changes.

- k. All DAP Grant projects **must** be completed no later than **April 30, 2024**, and your **Final Report must** be submitted to the District Grant Coordinator not later than **June 15, 2024**. The **Final Report Form** can be found on the District website (www.rotarydistrict5870.org).

NOTE: *Please ensure that you save all receipts and/or invoices (and that these are clearly marked paid) as they **must be** filed with the **Final Report** to cover all the expenses.*

- l. Failure to meet the final report deadline may seriously jeopardize District 5870's standing to request future district grant funding, and may result in the District being disqualified to receive any further TRF funding.

NOTE: *Timely reporting and good stewardship of previous grants **will be** a consideration in determining a club's future grant award.*

Contact District Grant Coordinator Richard Schneider (5870dapgrants@gmail.com) or District Grants Subcommittee Chair Ellen Hunt (ephainc@gmail.com) with any questions you might have with respect to DAP Grants.

4. **District Career and Technology Scholarships:**

- a. Each scholarship is \$5,000, funded entirely by funds from District 5870's District Grant.
- b. For the purposes of these scholarships, career and technology education (CTE) and training is defined as "education that prepares students for careers at various levels from a trade to a craft, or a position in engineering, accounting, nursing, medicine and other healing arts, architecture, pharmacy, and law that **does not** require a 4-year college degree to perform."

NOTE: *These scholarships are not intended for students wanting to attend a community college or technical school with the intent of later transferring any credits earned to a 4-year, upper-level college*

- c. The district has published a District **Career and Technology Scholarship Handbook** that contains detailed information about how to submit a scholarship application. A copy can be downloaded from the District website (www.rotarydistrict5870.org).

- d. Career and technology scholarships can last for a maximum of **two years**, enabling sponsoring clubs to fund a scholar's schooling through certification. Sponsoring clubs are expected, however, to contribute a minimum of **\$250** toward the student's expenses and can, if they desire, increase this amount to cover costs.
- e. The sponsoring Rotary Club is responsible for all scholarship management. District 5870 will send \$5,000 to your club and it will be responsible for disbursing scholarship funds in accordance with the **Terms and Conditions for Rotary Foundation District Grants**.
- f. Clubs sponsoring a Career and Technology Scholarship candidate are required to identify one Rotarian who will serve as **Scholar Counselor** to provide oversight and management of scholarship funds, and who will serve as a contact for District 5870. ***This individual must be current with Grant Management Training.***
- g. The **Career and Technology Scholarship Application Form** must be submitted to the District Career and Technology Scholarship Coordinator not later than **April 1, 2023**. A copy can be downloaded from the District website (www.rotarydistrict5870.org). Applications received after this date may be returned without action.
- h. The District Career and Technology Scholarship Committee will interview scholarship applicants on **April 14, 2023**. ***There is no alternate date for this interview, and candidates may be required to appear in person.*** Sponsoring Rotary Club's Scholar Counselors are highly encouraged to accompany their candidates.
- i. Sponsoring Rotary Clubs are required to submit either an **Interim Report** or **Final Report** to the District Career and Technology Scholarship Coordinator not later than **June 15, 2024**. If an **Interim Report** is submitted, the Final Report must be submitted not later than **June 15, 2024**.

NOTE: *Please ensure that you save all receipts and/or invoices (and that these are clearly marked paid) as they **must be** filed with both the **Interim Report** and the **Final Report** to cover all the expenses*

- i. Failure to meet these report deadlines may seriously jeopardize District 5870's standing to request future district grant funding; and may result in the District being disqualified to receive any further TRF funding.

NOTE: *Timely reporting and good stewardship of previous scholarships will be a consideration in determining a club's future scholarship award.*

Contact District Career and Technology Scholarship Coordinator Bob Crouch (**Martinaady@ctcd.edu**) or District Grants Subcommittee Chair Ellen Hunt (**ephainc@gmail.com**) with any questions you might have with respect to Career and Technology Scholarships.