Putting Your Foundation to Work



**SERVE TO CHANGE LIVES** 



### **2018-2019 Rotary Year**

District 6080 raised \$368,886

50% World Fund

50% District Designated Funds (DDF)



# **World Fund** \$184,443

Scholarships Polio Plus Global Grants



# DDF District Designated Funds \$184,443

50% District Block Grant 50% Global Grant



# Three types of Grants

Block Grant Global Grants

Package Grant

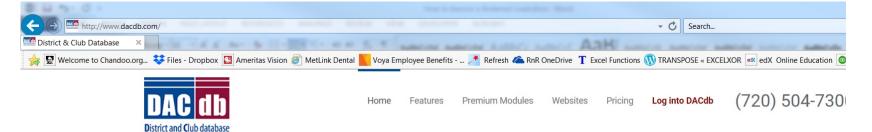


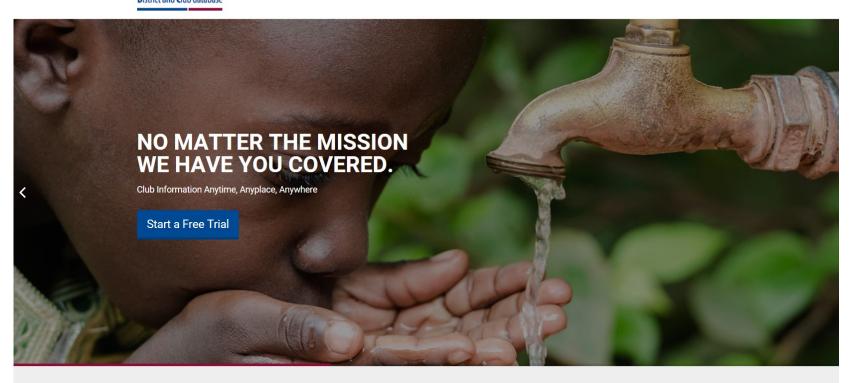
### **Block Grant**

Smaller scale community needs Broader guidelines Governed and approved by TRF

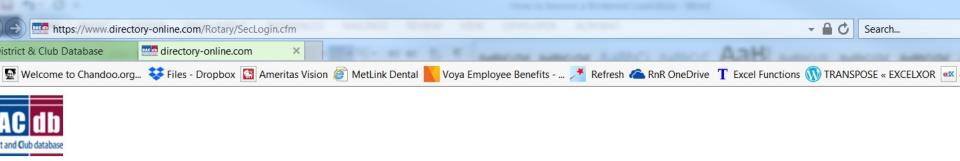


# DaCdb ON-LINE GRANT MANAGEMENT



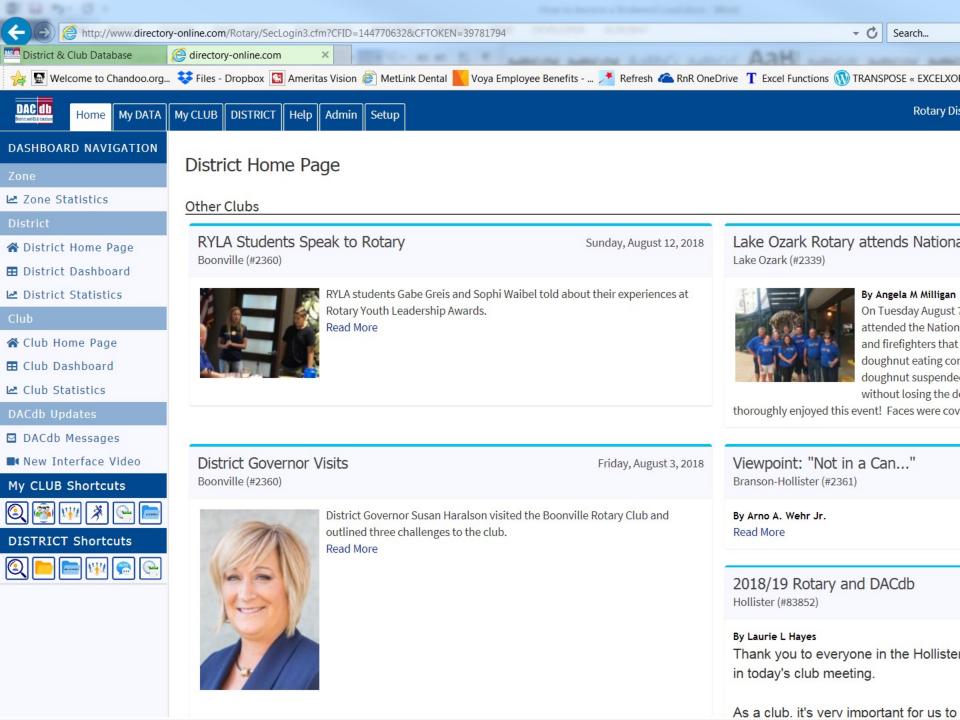


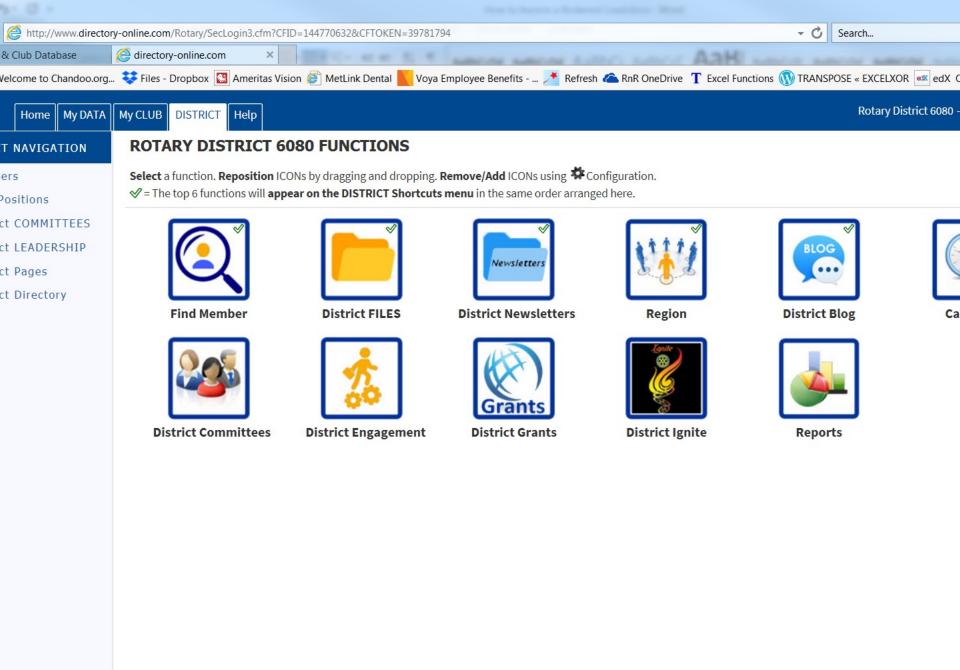
Why choose DACdh for your district or club?

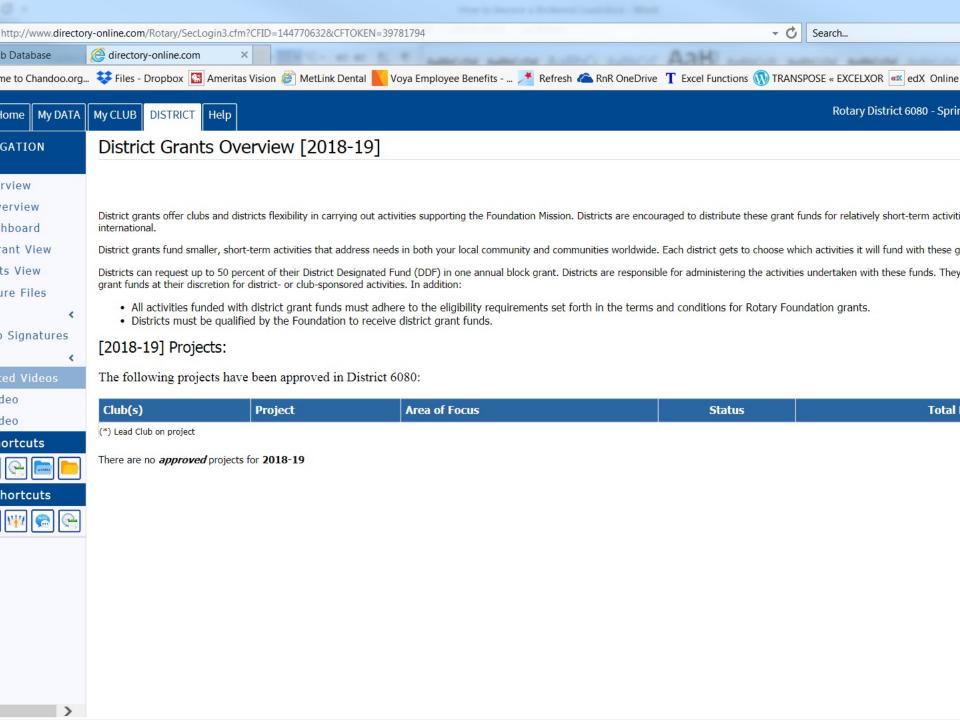


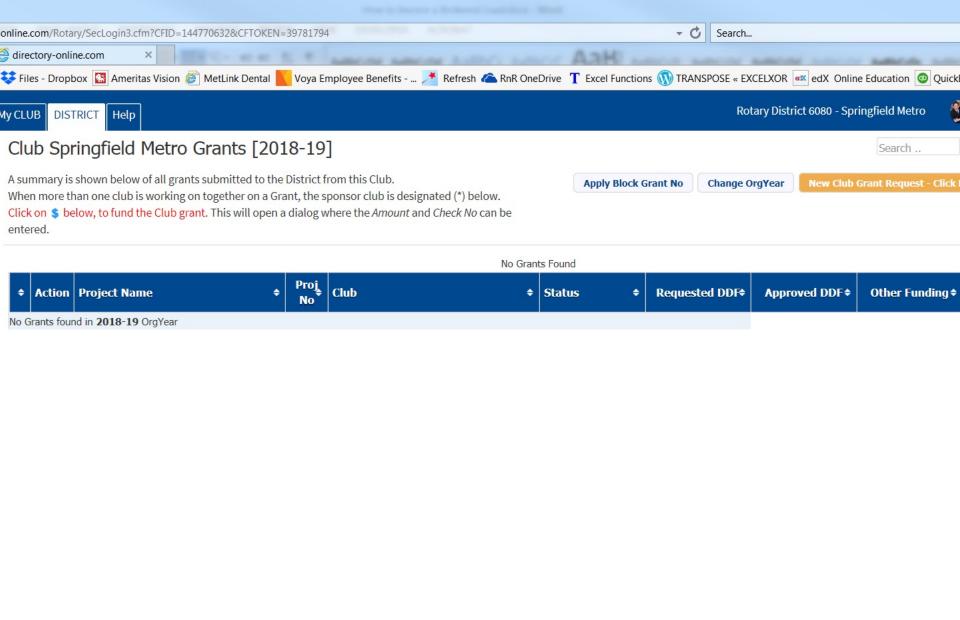
	to assist districts and clubs to meet their administra ons within the district for the district leadership, distri	
Sign In	Δ	lb Mobile
User Name:	(Usually your EMail address)	ıst got better!
Password: •••••• (	(Usually your RI MemberID or Last Name)	Have you tried
Club Number: 83729 Not required unle	ess you are an AG or District Officer	DACdb Mobile yet
Remember Me: OO NOT check this on public	systems (e.g., libraries, internet cafes)	
Login	1 6	http://m.DACdb.com
Forgot Password?		
	Login HELP Go	To DACdb Mobile

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#### New Club Grant Request - Click Here to Create Grant

Apply Block Grant No

Change OrgYear

#### **Grant Org Year**

×

Select the OrgYear to update the list on this page with the grants for that org year.

OrgYear: 2015-16 
Option: Save this as my working OrgYear
Set this OrgYear as the default for All members in my District

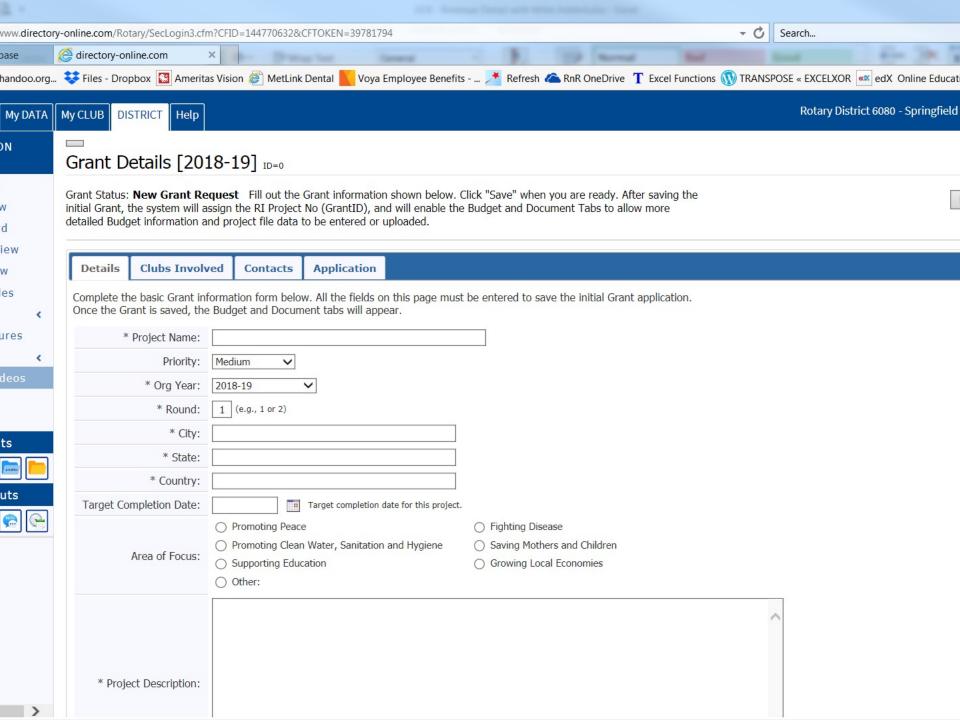
Cancel

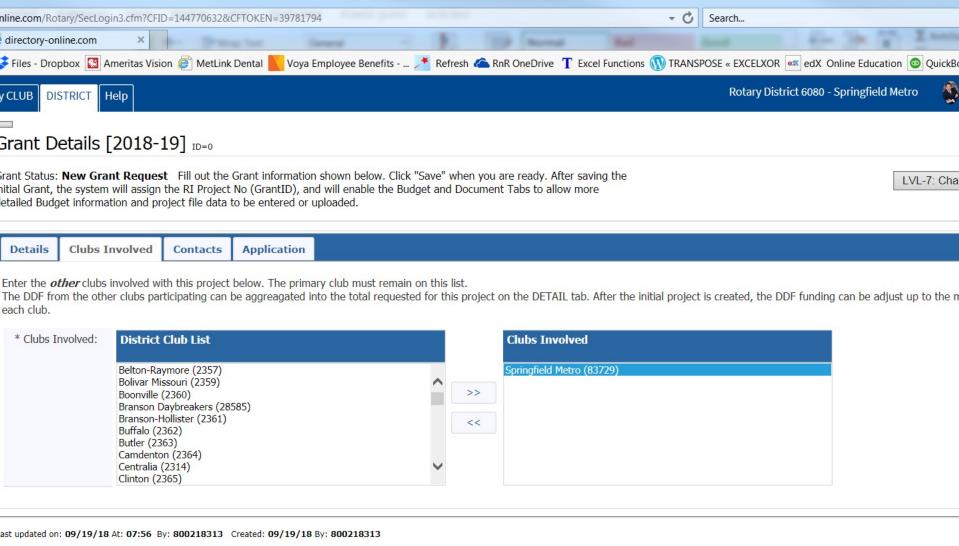
Change OrgYear

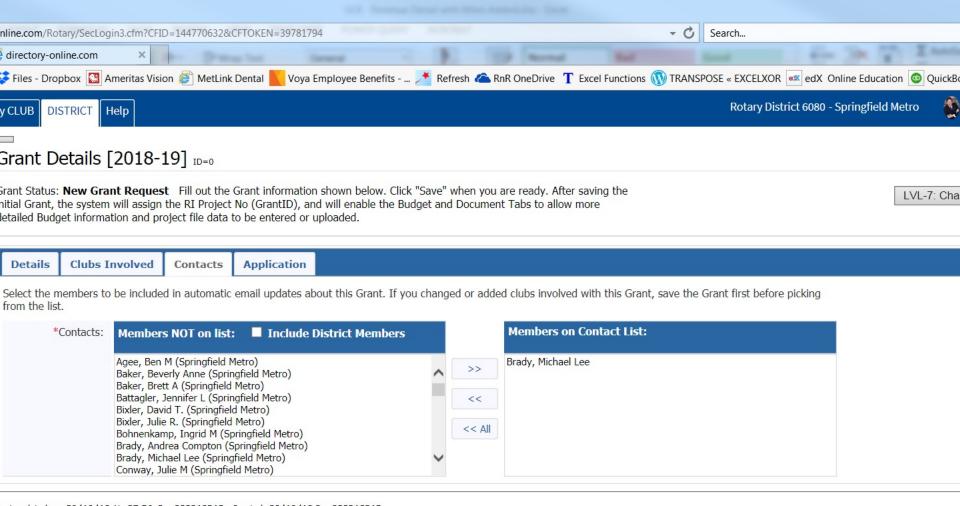
New Club Grant Request - Click Here to Create Grant

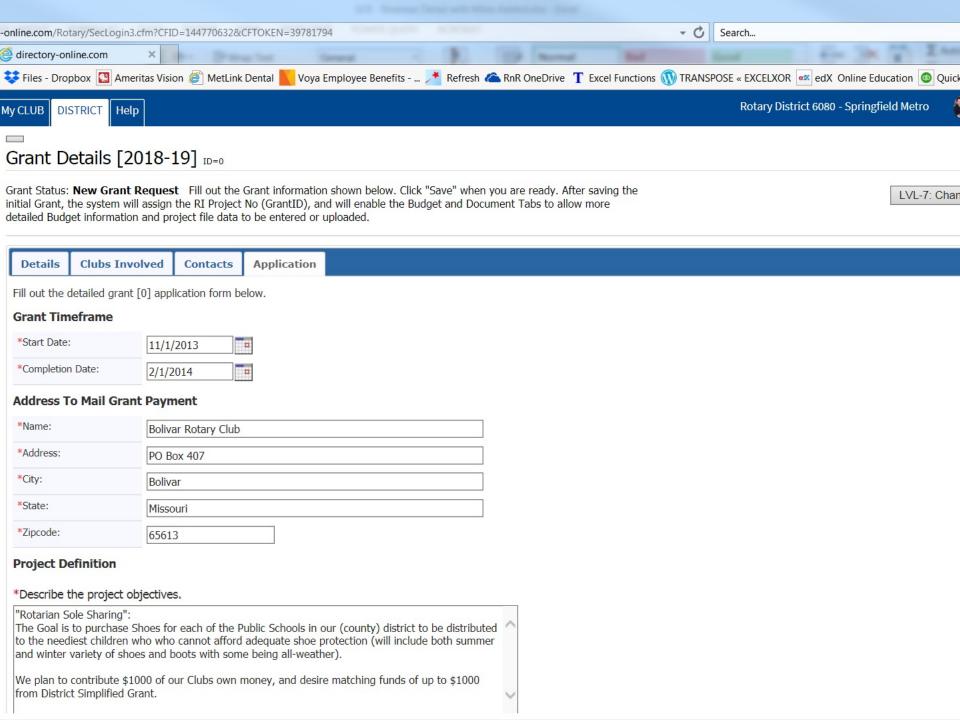
Apply Block Grant No

Change OrgYear









# \*Start Date: 11/1/2013 \*\*Completion Date: 2/1/2014

#### Address To Mail Grant Payment

*Name:	Bolivar Rotary Club				
*Address:	PO Box 407				
*City:	Bolivar				
*State:	Missouri				
*Zipcode:	65613				

#### **Project Definition**

Grant Timeframe

\*Describe the project objectives.

"Rotarian Sole Sharing":

The Goal is to purchase Shoes for each of the Public Schools in our (county) district to be distributed to the needlest children who who cannot afford adequate shoe protection (will include both summer and winter variety of shoes and boots with some being all-weather).

We plan to contribute \$1000 of our Clubs own money, and desire matching funds of up to \$1000 from District Simplified Grant.

\*Humanitarian Efforts: Describe how the project will benefit the community and/or improve the lives of the less fortunate.

This project was chosen to satisfy a Verified Expressed Need from area schools who said they have a large number of underpriviledged children in primary, middle, and secondary school who do not have adequate shoes to protect their feet. The schools indicated this was the greatest area of need in our community, and has been consuming most of the charitable donation funds they received in the past.

\*Active Rotarian Involvement: Describe the nonfinancial participation by rotarians in the project.

Club Rotarians will work in teams, with each team assigned to a particular school, to help identify the particular types and sizes of shoes for boys and girls in the particular school. Our Rotary Club Community Service Committee will ensure the appropriate ratio of shoes is distributed fairly to each of the schools based on the relative need of the students. Each team will assist a school representative in the purchasing of the shoes, and the Rotarians will personally deliver the shoes to the schools.

#### \*Publicity Plan: How will the general public know this is a rotary sponsored project?

We plan to publicize the "Rotarian Sole Sharing" project in the local Bolivar Herald-Free Press newspaper. The area School systems will also publicize in their newsletters the benefits received from our local Rotary Club. We expect the Bolivar School System will recognize us as a "partner of the month" after the shoes are delivered.

If the project involves a cooperating organization, please provide the name of the organization and attach a letter of participation in the documents section.	
Please describe any conflict of Interest, either actual or perceived, that exists with this project and any Rotarians in you Club. (Per section XII of the Terms and Conditions for Rotary Foundation District Grants and Global Grants updated September 2017.	
Authorization	
*The Rotary Club involved in this projet is responsible to Rotary District 6080 for the conduct of the project and for reporting of Understand and accept the terms of the Authorization below, the applicants confirm that they understand and accept the responsible to Rotary District 6080 for the conduct of the project and for reporting of Understand and accept the terms of the Authorization below, the applicants confirm that they understand and accept the responsible to Rotary District 6080 for the conduct of the project and for reporting of Understand and accept the terms of the Authorization below, the applicants confirm that they understand and accept the responsible to Rotary District 6080 for the conduct of the project and for reporting of Understand and accept the terms of the Authorization below, the applicants confirm that they understand and accept the responsible to the Rotary District 6080 for the Conduct of the Project and Project Conduct Con	
Yes, I Understand and accept the terms of the Authorization.	
Terms & Conditions	
*Each applicant affirms that all information in this application is true an accurate, to the best of their knowledge and that they Terms and Conditions for Rotary Foundation District 6080 - District Simplified Grants and Rotary District 6080 Grants Guideline Grants for Rotary Year 2018-19.	
Yes, I Understand and accept the terms and conditions.	



A complete budget is required. Complete both the income and expense section. These will be adjusted with actual number when it is time to complete the Final Report.

Funding should include all sources including outside sources. Include name of the source and the amount you will be receiving.

Expenditures should be itemized and include any estimated expenses for the project.

If you have any letters of commitments, copies of quotes and other documentation, please upload them under the Document Tab.

Click on the Document Tab

			_	$\longrightarrow$	Upload File	Add Folder
Navigation: <u>Home</u>						
Action	Туре 💠	File Name	<b>\$</b>	Modified \$	Size ♦	Attributes \$
		Backup		2014-02-23 10:36:19	0 KB	
	<b>3</b>	GrantApplication.html		2014-02-23 10:36:19	9 KB	
1 Direct	ory   1 File			Directory Space Used:	9 KB	

- Browse your computer for the file and click on add.
- Do not use any type of punctuation in the naming of your documents.



Save, save, save!

Each club needs two signatures. If other clubs are involved with your grant, you need two signatures from each club. The authorized signers have been identified by the Club.

The authorized signers will click on the pencil icon to edit the grant

	Action	Project Name	Proj No \$	Club \$	Status \$	Requested DDF	Approved \$	Other Funding \$	Total Project Budget \$
×	2 ×	TEST Grant #4	445	South Brunswick Islands (Ocean Isle Beach)	Draft	\$1,000.00	\$0.00	\$0.00	\$1,000.00
					Totals:	\$1,000.00	\$0.00	\$0.00	\$1,000.00

He/she will click on Club: Collect Grant Signatures

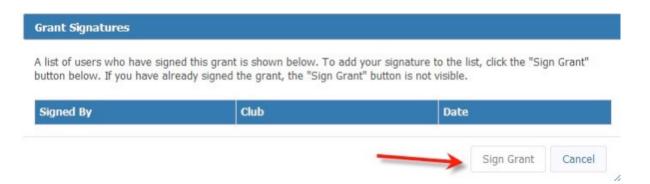


The following message will appear

Please confirm - you are about the start the process to collect the club signatures on this Grant application. If you continue, the next step is for the Club to get the required number of signatures so the Grant can be submitted to the District for Approval. OK, to Continue?



 He/she will click OK. Then click on Club: Collect Grant Signatures again. A new box will appear that says "Sign Grant"



• If there is more than one club involved, their representatives can now sign the grant. They will follow the same steps as above. Click on the pencil to edit the grant, click on *Club: Sign Grant Application*. The club signature box will appear again, but this time they will see the first signer's name and date on the box, then they will click on sign.



The last person to sign submits the grant for approval.

Club: Sign Grant Application Revert To Draft Submit Grant for District Approval

The status of your grant will now say "Submitted Grant for District Approval"

Action	Project Name	<b>+</b>	Proj No +	Club \$	Status \$
2	TEST Grant #4		445	South Brunswick Islands (Ocean Isle Beach)	Submitted Grant for District Approval
					Totals:

- The District will now review the grant. You can no longer make any edits to the application. However, you can add additional documents to the grant and add information to the expense tab. You can also "revert back to draft" if you need to start over.
- If the District requires more information, you will receive a note from the District Grant Chair. The grant will be changed back to draft if additional information is needed. You can then add the additional information and re-sign the grant.

## **Block Grant** \$186,421

District Simplified Grants \$70,000

Peace Grants \$ 5,000

Vocational Study Exchange \$12,000

New Generation Study \$ 5,000

Contingency \$ 1,210

Global Grants \$93,210



# **District Simplified Grant**

Single Projects
Amount determined annually
Up to full amount
Must be \$300 plus
\$100 increments
Club match 1:1



## **District Simplified Grant**

**Important Dates** 

Applications Due: May 15, 2021

Project Start: w/RI approval

Project completion: March 31, 2022

Final report deadline: April 15, 2022



# No Flex Grants For 2021-2022

# Peace Builder Grants Up to \$500 Peace Grant is available to Peace Builder clubs



# **DSG Eligibility Guidelines**

In line with the mission of TRF

Exclude RI and TRF from liability

Adhere to laws of US and host area



No harm to individuals or entities

Grant must be approved before work begins



Sponsors and travel to sanctioned countries comes with significant complications

Grants can't reimburse clubs for work already in progress or completed



Planning before the grant is approved is encouraged, but expenses can not be incurred

After grant approval, any changes to the project plan must be pre-approved by the Rotary Foundation



Demonstrate sensitivity to the host areas tradition and culture

Comply with TRF Conflict of Interest Policy

Comply with RI trademark policy



### **Conflict of Interest**

Exists when a Rotarian benefits financially or personally from a grant

Benefit can be direct to a Rotarian or indirect to an associate of the Rotarian

Please disclose any obvious or perceived conflicts of interest

#### **Grant Restrictions**

Can't discriminate against any group

Promote a particular political or religious viewpoint

Support activities that involve abortion or that are undertaken solely for sex determination

Fund the purchase of arms or ammunition

A new contribution to the Foundation or another Rotary Foundation Grant

Fundraising activities



Continuous or excessive support of any one beneficiary, entity or community

Purchase of land or buildings



Establishment of a foundation, permanent trust or long-term interest-bearing account

Project signage in excess \$500



Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations or entertainment activities



Public relations initiative, unless they are essential to project implementation

Travel to an NID (National Immunization Day)



Operating, administrative or indirect program expenses of another organization with the exception of expenses allowed within the project management allocation for global grants



Unrestricted cash donations to a beneficiary or cooperating organization

Activities for which the expense has already been incurred



Transportation of vaccines by hand over national borders

Immunizations that consist solely of the Polio vaccine



Study at a Rotary Peace Center partner university in the same or similar academic program as those pursued by Rotary Peace Fellows



Verifies grants were managed properly

Provides valuable data for your club, partners and Rotary



District grant final reports on DACdb website

Report due: April 15, 2022



All expenditures must be properly documented and reported

No separate bank account required



Must provide the expense documentation and bank statements

If working with a cooperating organization, they must submit expense documentation as well



## **District Grant Final Report Example**

Grant check for playground equipment at Good Job Rotary Club

Grant check from District 6080 \$1,500

1:1 match from club \$1,500

Include bank statement which indicates deposit of District grant funds into Rotary Club bank statement

Purchase of equipment from SS Playground \$3,000

Include copy of invoice from SS Playground, copy of bank statement showing check to SS playground



## **District Grant Final Report Example**

#### Grant for new refrigerator at Women's Shelter

Grant check from District 6080	\$2,000
1:1 match from club	\$2,000

Rotary Club check to Women's Shelter \$4,000

Women's Shelter must provide documents for \$4,000 purchase including a copy of the canceled check and refrigerator invoice

Rotary Club must provide copy of cancelled check to Women's Shelter and bank statement indicating deposit of district grant funds into checking account



Reputable non-Rotary organizations or academic Institutions that provide expertise, Infrastructure, advocacy, training, education or other support for the grant



Must agree to comply with all reporting and auditing activities required by TRF and provide receipts and proof of purchase



All funding provided to cooperating organizations must be used for specific project expenses



The sponsoring district must maintain an itemized report of such activities



# **Global Grants**



#### **Global Grants**

Support large international activities with sustainable, measurable outcomes in one or more of Rotary's Seven Areas of Focus



#### **Seven Areas of Focus**

Peace and conflict prevention/resolution Disease prevention and treatment Water and sanitation Maternal and child health Basic education and literacy Economic and community development The Environment



# **Sustainable Projects**

Giving a community the skills and knowledge to maintain project outcomes for the long-term, after grant funds have been expended.



RYE, RYLA, Friendship Exchange, Rotaract, Interact

International travel for youth under 18



New construction of or additions to any structure

Travel for staff of cooperating organization other than Rotary



Humanitarian projects that consist primarily of research or data collection or individual travel expenses

Undergraduate studies



Multiple unrelated projects under one grant

Must have a Global Grants Community Assessment





Apply for a Grant

My Grants

My Actions

**District Qualification** 

#### Rotary Grant Center

Welcome to Rotary grants! As Rotary members, we contribute our skills, expertise, and resources to solve some of the world's most serious problems. From providing clean we er in local communities to promoting peace worldwide, Rotary grants can bring your project ideas to life.

Use the Rotary grants tool to apply for a grant, track its progress, report on it, and search for other grants in your district.

#### Types of grants

The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training teams. Here's an overview:

Global grants support large international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus. They range from \$15,000 to \$200,000.

District grants fund smaller-scale, short-term projects that address immediate needs in your community or abroad.

Packaged grants fund up to 10 scholarships each year for students in a master's program on water and sanitation at the UNESCO-IHE Institute for Water Education in Delft, Netherlands.

#### The lifecycle of a Rotary grant



#### Draft Rotary members plan a project or scholarship and

build their grant

#### Authorization Club and district leaders review the application and

authorize funding

# The grant's

#### Submitted planners submit the application to The Rotary Foundation

#### Approved If the grant is approved, the Foundation issues

payment

#### Completion Members carry out the project, reporting to the Foundation annually

#### Grant Resources

Questions about the grant process? We're here to help, from getting you started to final steps.

Application Supplement for Microcredit Projects

Areas of Focus Policy Statements

Conflict of Interest Policy for Program Participants

Cooperating Organization Memorandum of Understanding

Global Grant Application Template

Global Grant Calculator

Global Grant Lifecycle

Global Grant Monitoring and **Evaluation Plan Supplement** 

Global Grant Report Template

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ROTARY.ORG > My Rotary David Bixler | Sign out **Grant Search** English Rotary 10 Grant Center Apply for a Grant My Grants **District Qualification** My Actions District Number: 6080 Rotary Grants Apply for a Grant District Status: <a> Qua</a> Grant Resources Apply for a Grant Questions about the grant process? We here to help, from getting you started to The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training final steps. teams. Application Supplement for Microcredit Projects **Apply Now** Areas of Focus Policy Statements Begin the grant application only after your club or district and partners have finalized the project plan and you've contacted your district about your project's need for funding. Answer every question clearly and concisely. Your Conflict of Interest Policy for Program regional grants officer will work with you to make any changes your application needs in order to meet grant **Participants** criteria. Cooperating Organization Memorandus of Understanding Choose the type of grant you're applying for: Global Grant Application Template Select Grant Type Let's begin! Global Grant Calculator Global Grant Lifecycle Global Grant Monitoring and Evaluation Plan Supplement **Global Grants** Global grants fund large international humanitarian projects, scholarships, and vocational training teams that have Global Grant Report Template sustainable and measurable results in one or more of Rotary's areas of focus. Global Grant Scholarship Supplement The application asks about your grant's objectives, participants, sustainability, budget, and financing. Grant Travel · Make sure that the grant falls within Rotary's global grant guidelines, is technically Global Grants Community Assessment feasible, your and your partner club are qualified to address this need, and issues Results aren't already being addressed by another organization.

# **Global Grant Financing**

Minimum budget for a global grant is \$30,000 US

Minimum \$15,000 must come from World Fund

DDF Matched 80% by World Fund



# **Global Grant Financing**

International sponsors provide at least 30% of total sponsor funding

Funds cannot be raised from beneficiaries or cooperating organizations in exchange for a grant



#### **Global Grant Financing**

Funds cannot come from other grants

Contributions credited to donor



# **Grant Funding With DDF**

\$ 15,000

\$ 15,000

\$ 12,000

\$ 42,000

Good Job Rotary Club (sponsoring club)

District 6080 DDF contribution (1:1)

TRF World Fund Match (100%)

**Total Global Grant Funding** 



#### **Grant Funding Without DDF**

\$ 18,000

\$ 15,000

\$ 33,000

Good Job Rotary Club (sponsoring club)

Other club support

**Total Global Grant Funding** 



#### **Partners**

International Convention Project fairs LinkedIn Facebook Rotary events www.matchinggrants.org/global www.rotary.org



# **Oversight And Reporting**



# **Global Grant Reports**

#### Timeline for reporting:

- Progress reports within 12 months of first payment
- Every 12 months through the term of the grant
- Final report within two months of completion



#### **Grant Management**

Ensures that projects have proper financial control

Meet the needs of beneficiaries

Fulfills the objectives as set forth by the grant application

Safeguards funds



#### Stewardship

Reporting irregularities

Rotarian supervision

Financial records review

Timely submission of reports



#### **Review of Club MOU**

Club qualification Club officer responsibilities Financial management plan Bank account requirements Reporting Document retention Reporting misuse of grant funds



#### **Document Retention**

Provide access to documents for transparency

Retain for a minimum of five years

Make copies



# District 6080 Qualification Requirements

Passing the online District Grants tests

Agree to by submitting the signed MOU



#### **Terms of Qualification**

Valid for one year
Club responsible for grant funds
Disclose conflicts of interest
Cooperate with all audits
Use grant funds properly
Implement the club MOU
Timely reporting of grant funds



# Thank you!

