

Rotary District 6080

2022-2023 District Simplified Grants

Project Development Checklist

Rotary Foundation funds through the district grant process can be used for projects that align with the mission of The Rotary Foundation, which is to enable Rotarians to advance world understanding, goodwill, and peace through the Improvement of health or support of education or alleviation of poverty. Review The Rotary Foundation's Seven Areas of Focus.

Foundation funded district grant projects must:

- Relate to the mission of The Rotary Foundation
- Been reviewed & approved by TRF before project implementation/spending begins
- Not use funds to reimburse clubs for activities and expenses already completed or in progress before grant project approval by the Rotary Foundation. Planning for grant project activities prior to approval is encouraged, but expenses may not be incurred. After grant project approval, any changes to the original project plan must be preapproved by TRF.
- Comply with the Rotary Foundation Terms and Conditions
- Comply with the Conflict of Interest Policy for Grant Participants
- Comply with the policy regarding the Use of Rotary Marks

Foundation funded grant project cannot be used to/for:

- Unfairly discriminate against any group
- Promote a particular political or religious viewpoint
- Support purely religious functions
- Support activities that involve abortion or that are undertaken solely for sex determination
- Fund the purchase of arms or ammunition
- Serve as a new contribution to the Foundation or another Rotary Foundation grant
- Continuous or excessive support of any one beneficiary, entity, or community
- Establishment of a foundation, permanent trust, or long-term interest-bearing account
- Purchase of land or buildings
- Fundraising activities
- Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities

- Public relations initiatives, unless they are essential to project implementation
- Project signage in excess of 10% of grant amount
- Operating, administrative, or indirect program of expenses of another organization
- Unrestricted cash donations to a beneficiary or cooperating organization
- Activities for which the expense has already been incurred

Tips to Avoid Common Mistakes

- Check the Conflict of Interest Policy when Rotarians are board members of benefiting organization or a vendor for the goods and services being purchased
- Get pre-approval for change in project.
- Be sure project expenditures can be done in timeframe (August – March) regardless of items out of your control – weather, dependence on other organization, etc.
- Spend all the grant money in accordance with approved project. Unspent and unapproved expenses must be returned to the district
- Parties, gifts are not allowed unless you can show humanitarian or educational purpose
- Food & drinks used for event refreshments; hospitality should not exceed 10% of grant amount
- GED and College scholarships – paid directly to the school in name of the student. May not be paid to the school's foundation. Final report must include name of student(s) and receipt(s)
- No gift cards unless distribution log and receipts provided to show actual goods and services purchased
- Pay the vendor or supplier of goods and/or services directly from the club's bank account or with a club credit card is ideal. Reimbursement to individuals for project related expenses will be accepted with documentation of receipts and cancelled check as reimbursement
- If in doubt, check with District Grant chair

District Grant – Final Report Requirements

- The grant report documentation is submitted online for your grant request at DACdb.com
- The grant report is due 30 days after the project spending is completed and no later than April 15, 2023, whichever comes first
- A clearly organized report of expenses including copies of all paid invoices and receipts with cancelled checks from the club account for purchases made with grant funds must be included
- Approved expenditure receipts with equal or exceed the total grant amount