

# **DISTRICT 7620 GRANTS GUIDE**

The District Rotary Foundation Chair (DRFC) and District Governor (DG) encourage all Rotary Clubs in District 7620 to apply for matching District Designated Funds for their projects.

Each Rotary Year The Rotary Foundation (TRF) allocates District Designated Funds (DDF) to be used by District 7620 for grants equal to 50 percent of the amount contributed by the district, its clubs, and their members to the Annual Fund three years earlier. Approximately half of this DDF is allocated to District Grants and half to Global Grants each year.

District Grants are smaller, short-term activities that address needs in local and international communities. Such grants are for humanitarian projects that demonstrate a requirement for small capital items, startup funding or services that provide direct and tangible benefits that can be accomplished on a short-term basis. They are funded by clubs, club foundations, individual members and other people and organizations. Club and club foundation contributions to the grant are matched by DDF.

Global grants support larger, longer-term projects. They have a minimum budget of \$30,000 and are similarly funded by a combination of clubs, club foundations, individual members and other people and organizations, with matching DDF for club and club foundation contributions. The DDF in Global Grants is further matched at 80 percent by World Fund from Rotary International.

All grants must demonstrate sustainable, community-driven, measurable, high-impact outcomes. DDF is allocated based on completeness and quality of information, alignment with The Rotary Foundation and District requirements and availability of DDF funds.

This guide highlights the Rotary Club eligibility prerequisites for DDF, District and Rotary International (RI) parameters for grants, required grant application elements, District 7620 evaluation criteria and reporting requirements. Detailed guidance can be found in the linked documents, District 7620 website, DACdb and the Grants Center and myLearning of My Rotary.

## **A. District 7620 Rotary Club Eligibility**

Since matching funding for grants originates from contributions, the District rewards clubs and their members who have donated to the Annual Fund. Accordingly, to be eligible for DDF, Foundation reports in My Rotary for the Rotary Club must demonstrate by the 30th of June of each year at least:

- i. \$100 per capita /average contribution per club member to the Annual Fund, Polio or District and Global Grants;
- ii. 50% of club members contribute a minimum of \$25 to the Annual Fund (Every Rotarian Every Year - EREY); and
- iii. 50% of club members are Paul Harris Fellows.

Contributions count toward each of the above, e.g., the per capita giving includes the EREY and Paul Harris Fellow donations. To fully understand these requirements and other RI mandates, at least two members from each club must attend training provided by the DRFC each year. These members should hold the positions of the President, President-Elect, Club Foundation Chair, Club Grants Chair or other leadership position. Clubs applying for DDF must also execute a Memorandum of Understanding ([2023-24 MOU](#)) confirming their contributions and additional details regarding the management of grants. Clubs that do not satisfy the above requirements are strongly encouraged to participate with qualified clubs in grants; collaboration is key to successful grants.

## **B. Activities Eligible for DDF**

Clubs can use district funds for a variety of projects and activities consisting of:

- Humanitarian projects
- Scholarships
- Vocational training teams / professionals providing or receiving professional development

There is plenty of freedom to customize the service projects as long as they:

- i. Align with one or more of Rotary's Areas of Focus ([Areas of Focus](#)).
- ii. Respond to a community need and are designed in collaboration with the host community. Global grants must be developed in response to a formal Community Assessment ([Community Assessment](#)) by the host Rotary Club.

- iii. Are sustainable. The community where a project is carried out must be able to continue to address the needs after the grant funding is spent.
- iv. Are measurable. Global Grants particularly must select standard measures from the Global Grant Monitoring and Evaluation Plan Supplement and may add their own measurements.
- v. Involve active participation by Rotary members, especially in the monitoring and reporting of grant progress.
- vi. Are sponsored by a club or district in the country where the project will take place (the host club) and a club outside that country (the international club).
  - i. Include signage that identify Rotary and the Rotary Club(s).

Projects may include construction and renovation and even Community Assessments for District community grants, but not purchases of land. Travel and microcredit activities may also be funded by DDF in designated circumstances. However, DDF cannot provide an unrestricted donation to any person or organization or pay for indirect /operating expenses of an organization. For a full list of activities and any corresponding limitations, please refer to Terms and Conditions for Rotary Foundation District Grants ([Ts & Cs for Rotary District Grants](#)) and Terms and Conditions for Rotary Foundation Global Grants ([Ts & Cs for Rotary Global Grants](#)).

### **C. General Terms Applicable to all Grants**

- i. DDF is a 1:1 matching fund; clubs or their foundation must contribute \$1 for each \$1 of DDF. Funds from other sources are not matched.
- ii. To permit equitable distribution throughout the District, DDF is limited per club. The maximum DDF match per club for a single grant is \$5,000 and a maximum 15% of the available DDF for the year across all the club's District or Global Grants, unless an exception is made by the DRFC based on the availability of funds and quality of the applications.
- iii. To permit equitable distribution throughout the grants, DDF is limited per grant. The maximum DDF match per single grant is 15% of the available DDF for the year across all participating District clubs, unless an exception is made by the DRFC based on the availability of funds and quality of the application.
- iv. No project may begin, and no funds can be expended, prior to award notification; no grant funds can be used to reimburse costs incurred prior to award. For District grants award notification is targeted after 1 July for applications

submitted by 31 May. Global grant approval may take several months depending on the responsiveness of the application.

#### **D. Additional Terms Applicable to District community Grants**

- i. Grant application submission is only acceptable electronically via the DACdb Grants Module.
- ii. The window for grant applications to be submitted to District 7620 for each Rotary Year is March 1st through May 31st. If funds are still available after the first round of approved District grants, clubs may submit additional applications pursuant to announcements by the DRFC.
- iii. Clubs with approved grants will receive 50% of their grant matching funds as soon as District 7620 receives its DDF allotment from The Rotary Foundation (usually late July). The remaining 50% will be paid upon the completion of the grant reporting requirements (the Final Report).
- iv. The project must be completed, all funds expended and a compliant Final Report, including detailed explanation of expenditures, must be submitted in DACdb by May 15th.

#### **E. Additional Terms Applicable to Global Grants**

- i. Grant application submission is only acceptable electronically via the Grant Center in My Rotary.
- ii. The window for Global grant applications submission to District 7620 for Rotary Year commences July 1st. Applications will be accepted by the District as long as Global DDF is available.
- iii. Global matching DDF from the District must be approved by the DRFC in writing. Applications for Global Grants drafted in My Rotary Grants Center may not include District 7620 DDF prior to obtaining specific approval by the DRFC of the amount being requested.
- iv. Funding of the approved DDF and Final Report requirements will be in accordance with the Terms and Conditions for Rotary Foundation Global Grants.

## **F. District 7620 Evaluation Criteria**

The DRFC has established a Grants Committee comprised of Rotarians from various clubs around the District (large and small, city to county) who:

- advise on grant development
- review applications and recommend awards of DDF
- review Final Reports for project completion

The Grants Committee focuses on District community Grants but can advise on Global Grants and any special grants.

Award of DDF is on a competitive basis, not first come first fund. The Grants Committee scores community grant applications based on District Evaluation Criteria ([District Evaluation Criteria](#)) summarized below. Though no formal scorecard is used for Global Grant applications, a similar analysis is used by the DRFC for allocating DDF prior to authorizing Global Grant submittals to RI.

### **i. Project Objectives**

The application should contain a clear description of the need for the project supported by community input. For example, it should detail from where the project originated and who was involved in assessing the need and designing the solution. Though Global Grants require a detailed Community Assessment, District applications are less proscriptive as long as there is adequate understanding of the need for the project and community involvement. The application should identify the Focus Area(s) and discuss the relation to our District priorities. And it must clearly describe the project goals and how they address the identified community need.

### **ii. Project Design and Management**

The application should contain a work plan listing specific tasks and associated timeline. RI strongly urges local ownership, local training, buying locally and some local contribution. This should be built into the work plan. The roles and responsibilities of all participants - each club or organization - involved in the successful completion of the grant need to be identified. Permissible cooperating organizations are reputable organizations or academic institutions that provide expertise, infrastructure, advocacy, training, education or other support for the project. Such organizations need to comply with all of RI's requirements, including reporting and providing receipts. Letters of participation / commitment are required from each participating organization acknowledging their roles and responsibilities.

For international projects, a local Rotary Club must be one of the participants to ensure local community input, management of the tasking and sustainability. The international Rotary Clubs must submit letters acknowledging their roles and responsibilities in performance of District grants. For Global Grants, a formal memorandum of understanding between the clubs and any cooperating organization is required by RI.

### **iii. Impact and Sustainability**

The application should delineate specific outcomes with supporting data to verify the outcome. Objective measures and specific metrics used to evaluate the success of the grant is desired. The Committee looks at the breath of impact, the more beneficiaries the higher the score, though this is not dispositive.

Sustainability is critical to acceptance of an application. As defined by RI, sustainability "provides long-term solutions for community problems that community members themselves can support after the grant funding ends." This reinforces the requirement to start with the community need and involvement, along with purchasing locally. The application should include commitments from the participants for the specific actions needed to maintain the project.

### **iv. Financial Feasibility**

A detailed line item budget must be included in the application. Such budget should be supported by competitive quotes and include all items and services to be purchased. In addition, all funding sources need to be specified including all participating Rotary Clubs and non-Rotary contributions and matching DDF. The application should demonstrate that the costs are reasonable in relation to the outcomes and identify elements that are being provided by volunteers. As noted, grants cannot fund projects already in progress. Any DDF provided to cooperating organizations need to be used for specific project expenses and the primary Rotary Club needs to keep an itemized record of these expenses. Clubs and organizations need to work out any upfront financing considerations.

## **G. How to apply**

### **i. District Grants**

Since the tabs in DACdb are generic and used across Rotary districts, they are not necessarily in sync with our District 7620 Evaluation Criteria. Therefore, the Grants Committee is flexible regarding the format of the required information for

District Grants. Any document which makes it easy for the Grants Committee to verify objectives, design, participants, sustainability and feasibility should be attached to the application.

The following summarizes information the primary club must complete in the DACdb tabs of the on-line application.

Details

Project Name

Location - city, state

Target Completion Date - must be prior to 15 May

Rotary Focus Area

Project Description

Clubs Involved

Contacts - Rotarians

Application

Grant Timeline - Start, Halfway estimate and Completion Dates

Grant Payment address - must be a Rotary Club or its Foundation

Project Definition

Objectives - aligns with the Project Objectives Evaluation

Criteria

Humanitarian Efforts - aligns with the Design and Management and Impact and Sustainability Evaluation Criteria

Rotarian Involvement - minimally management and reporting

Publicity - so that the public will know it is a Rotary project

Budget - line item amounts by Rotary Clubs, DDF and other contributors

Expenses - line item by expense, supported by quotes/rational in attached documents. These two tabs align with the Financial Feasibility Evaluation Criteria

Documents - attach anything that will further the understanding of the project and its value. Examples include relevant informational flyers, photographs and graphics, quotes or other budget supporting documents and the letters of commitment / participation.

In addition to training on the DACdb site, detailed mechanics for entering an application for a District Grant are described in the DACdb Guide ([DACdb Guide](#)). Please contact DACdb Support (support@DACdb.com) for difficulties in using the database.

## ii. Global Grants

All Global Grant applications must be submitted via the Grant Center in My Rotary. In addition to training on the myLearning site, detailed mechanics for entering an application for a Global Grant are described in the Grant Center

Guide ([Grant Center Guide](#)) with support available from the Support Center )1-866-976-8279 or [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org). The following summarizes information the primary club must complete in the Grant Center of the on-line application:

Basic Information

Grant title

Type of Project - Humanitarian, Scholarship or Vocational

Primary Contacts

Committee Members - Host and International

Project Overview

Main objectives, beneficiaries

Focus Area

Measuring Success

Goals

Measures - including at least one standardized measure

Data collection

Location and Dates

Participants

Cooperating Organizations - why and what role

Rotarian Participants - host role, international role

Budget - by line item

Funding - by line item including DDF and World Fund to including 5% administrative fee

Sustainability

Project Planning - how program team identified the needs, community involvement in assessment and planning

Project implementation - by activity

Related community initiatives

Training, community outreach, educational programs

Community members or groups to oversee continuation

Budget

selection of local vendors

operation, maintenance, training and ownership of equipment/material

Funding

microcredit

local funding for sustaining

generation of income

Authorizations

Global Grant Agreement

Authorizations - DRFC, Host and International Clubs

Global Grants have specific funding and payment requirements. Though award of DDF is on a competitive basis, the earlier in the Rotary year the request for funds is submitted to the DRFC, the more likely there will be funds available. Such request must include definite commitment of funding from the other resources. Do not include DDF in your application until receipt of written authorization from the DRFC. No funds should be sent to RI until the grant has been approved in the Grant Center since all monies received for non-approved or cancelled grants will automatically and irrevocably be contributed to the World Fund. At least 15% of contributions to Global Grants that fund humanitarian projects need to come from outside the project country.

The international and host clubs must be qualified by RI. This should be verified prior to initiating a grant application. Grants performed in India or the Philippines must comply with additional requirements relative to local and international law such as the Foreign Contribution Regulation Act as set out in the Terms and Conditions for Rotary Foundation Global Grants ([Ts & Cs for Rotary Global Grants](#)).

## **H. Final Reports**

Reports are required for all approved grants. As specified by RI, acceptable reports contain detailed accounts of the project's implementation including:

- i. A description of how the project has advanced the goals of the selected area(s) of focus, including number of beneficiaries
- ii. An account of how the project achieved the specific objectives outlined in the grant application, including the measures and what data was collected
- iii. An explanation of how the project's results will be sustained over time
- iv. A description of how any host and international Rotary Clubs as well as any cooperating organizations participated in the project
- v. A detailed account of project spending, including invoices of items purchased and expenses paid

All District Grant recipients need to submit their Final Report in DACdb by 15 May. District 7620 wants all grants to be successful and understands that there may have been delays and adjustments. Accordingly, the Grants Committee will accept reasonably related deviations to the approved scope and proposed expenditures of a District Grant as long as they are consistent with the original purpose of the grant. Explanations of deviations should be included in the Final Report. Supporting documentation, including invoices/receipts, should be added as attachments to the Final Report. Checks or bank receipts from the Rotary Club to the cooperating organization will not satisfy the requirement for specific receipts for the grant

purchases. A cooperating organization can provide details for the Final Report (as an attached document), provided the required information is included. The tab for the Final Report can be found in DACdb by using the edit pencil for the relevant grant. Technical information regarding inputting Final Reports in the DACdb Grants Module can be found in the DACdb Guide ([DACdb Guide](#)).

Upon review and approval of the Final Report by the Grants Committee, the remaining 50% of awarded DDF funds for the District Grant will be released. A club who fails to complete the project or submit a satisfactory Final Report will be required to return all DDF paid to date.

For Global Grants, the first progress report needs to be submitted within 12 months of receiving the first grant payment. After that, progress reports are due within 12 months of the acceptance date of the previous report with the Final Report due within two months of completing the project. RI will not approve any additional grants for the host or international club if they are delinquent in submitting reports for Global Grants. Technical information regarding inputting Final Reports in the Grant Center can be found in the Grant Center Guide ([Grants Center Guide](#)).

All Global Grant recipients need to submit their Final Report in the Grant Center. Both the host sponsor and the international sponsor are required to complete, authorize and submit the report. All deviations must be pre-approved by the Foundation. The Foundation may, at any time, review grants, conduct audits, send monitors, require additional documentation or suspend any or all payments.

## **I. Additional Assistance**

The District and RI have numerous resources to assist in grant applications. In addition to reaching out to the DRFC, DG and Grants Committee, the following can assist in developing and reviewing grant applications:

- knowledgeable members of your club or the District
- cooperating organizations
- District International Service Chairs, who can connect you with other clubs
- Rotary Action Group related to your project
- Regional grants officers, who can advise on global project design and qualification
- The Cadre of Technical Advisers for the Focus Area- volunteers who offer professional skills and technical expertise for planning, evaluating and implementing projects