



## Club Grants Qualification

Presenter PDG Linda Puchbauer  
 District 6060 Foundation Chair, 2020-23  
 Date: February 2023



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## CLUB QUALIFICATION

- Training of Club Leadership
- Acceptance of Regulations via Memorandum of Understanding
- Careful Oversight and Stewardship in Implementing Grant Projects
- Record Retention

**Required for All Clubs Receiving Grant Funds**



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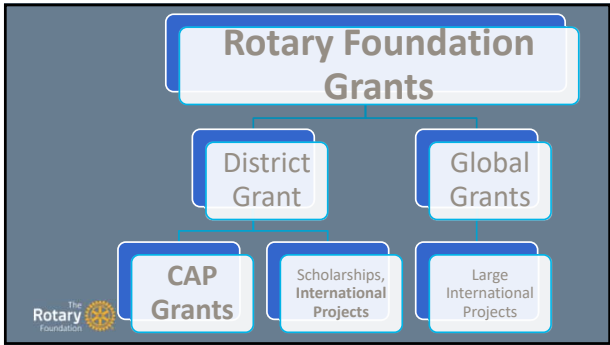
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**D6060 CAP GRANTS**

- District Grant Funded
  - All rules apply
- CAP = Community Assistance Program(this is not a Rotary International term just District 6060)
- Generally a \$2,000 project
  - Club contributes \$1,000
  - District provides \$1,000 match



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**D6060 CAP GRANTS**

- Timeline:
  - June 15, 2023: Deadline for Applications
  - Early July, 2023: Notification of Approval by Grants Committee
  - Mid-August, 2023: Disbursement of Matching Funds
  - January 31, 2024: Deadline for Project Completion
  - February 28, 2024: Final deadline for Final Project Report



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**AREAS OF FOCUS**

- Promoting peace
- Fighting disease
- Providing clean water
- Saving mothers and children
- Supporting education
- Growing local economies
- Saving the Environment

(Also, Meeting a genuine need that betters the lives in the community)



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## D6060 CAP GRANTS

- Follow Regulations—on D6060 Website
  - Rotary6060.org Click on Foundation, CAP Grants
- Project is only twice in the past and organization can be benefitted only three times. You can find previous CAP Grants on website under CAP Grants Archive back to 2000
- Must be a Club-driven project
- Club can buy equipment from another organization; cannot donate money to another organization



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## CAP Grant Application Question 2

- Describe the project, its location, and its objectives.
  - Keep it Simple
  - Be specific
  - Measurable outcomes
- Estimated Start Date—*After* receipt of funds
- Estimated Date of Completion.



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## CAP Grant Application Question 3

- Describe how the project will benefit the community and/or improve the lives of the less fortunate.
  - Keep it Simple
  - Be specific
  - Long-term outcomes
  - Sustainability*



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### CAP Grant Application Question 4

- Describe non-financial participation by Rotarians in the project (i.e. Rotarian activities).
  - Planning
  - Implementing
  - Managing of finances
  - Assessment/Evaluation
  - Follow-up



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### CAP Grant Application Question 5

- Project Contacts—Two Rotarians must be listed who will provide oversight and management of the project funds.
  - First Contact **MUST** have attended Qualification Training and be the author of the Grant Application.



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### CAP Grant Application Question 6

- How will the general public know this is a Rotary-sponsored project? Please provide details, e.g. publicity in a newspaper or display of the Rotary wheel with the club name.
  - Be specific
  - Signage is important, to let the community know what Rotary does.
  - Use of Rotary wheel logo requires identification of the Club or District.



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### CAP Grant Application Question 7

- Cooperating Organizations—if the project involves a cooperating organization, please provide the name and attach a letter of participation from that organization...
  - Partner, not the beneficiary of the project
  - Project MUST be planned and implemented by the Rotary Club—not the cooperating organization.



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### CAP Grant Application Question 8

- Budget—Please provide a complete, detailed, and itemized budget for the entire project....Include pro-forma invoices (estimates) for equipment that will be purchased through this grant.
  - List each item with expected cost
  - Provide total cost of entire project



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### CAP Grant Application Section 9/10

- Authorization
  - Club President-Elect signs before submitting and
    - Only has authority to commit club resources and request District funding.
    - The President-elect MUST have attended this training in order for the club to qualify.
  - We will obtain the District Governor’s signature *after* project is approved.



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### CAP Grant Application Checklist

- Use this checklist to ensure that you have met the regulations.
- All items must be checked.
- Submit application with checklist to CAP Grant Chair.
- Once Grant is approved must be entered into Rotary Club Central under Service Activities



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### CAP Grant Final Report

- Must be submitted within 30 days of completion of the project.
- Project **MUST** be completed by January 31, 2024
- Final Report deadline is February 28, 2024
- Take photos of Rotarians working, and of completed project.
- Attach copies of photos and receipts.
- Keep original receipts in club files for five years.



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### CAP Grant Final Report Question 1

- Briefly describe the project. What was done, when and where did project activities take place, and who were the beneficiaries?
  - Simple
  - Specific



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### CAP Grant Final Report Questions 2/3

- How many Rotarians participated in the project?  
***Must be a number.***
- What did they do? Please give at least two examples.
  - Be specific
  - Include planning, implementing, managing finances, follow-up
  - Provide photos of all steps



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### CAP Grant Final Report Questions 4/5

- How many non-Rotarians benefited from this project? ***Must be a number.***
- What are the expected long-term community impacts of the project?
  - Be specific
  - Address sustainability
  - Measurable



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### CAP Grant Final Report Question 6

- If a cooperating organization was involved, what was its role?
  - Rotarians MUST plan and implement the project—cooperating organization should be supporting and assisting.
  - Beneficiary organizations are NOT cooperating organizations.



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### CAP Grant Final Report Questions 7/8

- Financial Report
- Income
    - Detail "Other Funding"
      - Club contribution
      - Private contribution
      - Cooperating organization contribution
  - Expenditures
    - Details
  - TOTAL INCOME = TOTAL EXPENDITURES
  - **SPEND THE MONEY!!!**



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### CAP Grant Final Report Question 9

- Certifying Signature
  - Note paragraph detailing what you are certifying.
  - Primary contact should be the signer.
- Submit to District Grants Chair.
  - Attach *copies* of all receipts.
  - Attach or send photos.
  - Retain *originals* of all receipts and photos.



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## CAP GRANT GOLDEN RULES!

- SPEND ALL THE MONEY.
- WRITE CHECKS ONLY TO **VENDORS**—NOT BENEFICIARIES OR COOPERATING ORGANIZATIONS.
- SAVE **ACTUAL RECEIPTS** INDICATING PAYMENT AND ZERO BALANCE DUE—NOT CREDIT CARD STATEMENTS.
- MAKE SURE YOUR INCOME IS **EQUAL TO YOUR EXPENSES**.



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## WHAT NOW?

- Sign Memorandum of Understanding and return via email to [linda.rotary6060@gmail.com](mailto:linda.rotary6060@gmail.com)
- Meet with your Club members to plan your 2023-2024 CAP Grant Project.
- Apply by early June for the deadline:  
JUNE 15, 2023



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