ROTARY DISTRICT 6200
2024-25 GRANTS QUALIFICATION GUIDE

The Rotary Foundation returns District Designated Funds to District 6200 to be used for District and Global Grants. For your convenience, the District Rotary Foundation Committee has developed this Grants Qualification Guide to assist clubs in the preparation of their grant applications. This guide includes examples of those forms that your Club's Board will need to approve, then signed by the appropriate Club officers, and uploaded as part of the grant application on DACdb. Additionally, the Committee has included several documents that may be of aid to the Club's Board and the Club's Foundation Committee as they work through the granting process.

Included in the District Qualification Guide are:

- Examples of the forms that require Club Board approval and appropriate signatures, or checklist completion; and then uploaded with District Grant application. These forms in Word, fillable formats, can be found on the District website (www.rotary6200.org or on DACdb under District Grants – Grant Secure Files (tab on the left).
  - o Club District Grant Checklist
  - o Club Memorandum of Understanding & District Addendum to MOU
  - o Cooperative Organization MOU
  - o Club Financial Management Plan
  - o Club Rotary Foundation Committee Information
- Informational documents to assist in granting process:
  - o Calendar of Important Dates
  - o District/Club Misuse or Mismanagement Plan
  - o Rotary Club Central – Setting Annual Fund Goals
  - o Guidelines for District Grants – Grant Cycle 2024-25
  - o DACdb Grants Module Instructions
  - o District Grant Resources

Your Club is encouraged to apply for a share of our District's allocation of approximately $50,000 in District Grant funds for the 2024-25 Grant Cycle. The deadline for receipt of applications for District Grants is Friday, May 10, 2024. Please remember that the District has moved from paper to electronic applications, and we are utilizing the District Grant Module found in DACdb.

These guidelines seek to encourage our District's Rotary Clubs to carry out humanitarian service and educational projects and to continue their financial support for The Rotary Foundation, with a goal of each Rotarian in the District meeting the $100 annual giving level (Every Rotarian, Every Year / Sustaining Member).

The District's granting procedures are set forth to help assure stewardship and accountability for Rotary Foundation funds entrusted to the Rotarians of District 6200 and to establish financial guidelines for oversight of Rotary Foundation funds. Where a conflict exists or develops between District 6200 guidelines and the policies, bylaws, or rules of The Rotary Foundation, or Rotary International, The Rotary Foundation or Rotary International policy will apply.

All qualified clubs are encouraged to submit a District Grant application for the 2024-25 Grant Cycle. Clubs with multiple grant applications should rank them in order of priority. The District Rotary Foundation Committee (DRFC) will review the grant applications as a group. The DRFC will give first preference to qualified and completed applications that are submitted. After this, any remaining applications will be reviewed and ranked by the DRFC. Club contributions toward The Rotary Foundation giving and Club matching contributions to the proposed project will be considered if the requested grant funds exceed the available funds. Please remember that a 15% minimum match from the Rotary Club and/or non-Rotary partner is required. The DRFC may also review the Club's ranking according to the considerations listed below if grant requests

exceed the amount available. The DRFC does not plan on offering a second round of grants so that possible delays in receiving our District Block Grant and disbursing funds to our clubs can be avoided.

The funding range for District Grants during the 2024-25 Grant Cycle will be from $500 to $2,000. Clubs are eligible for up to $2,000 in District Grants for this cycle. A project budget may exceed the requested support from the District through a District Grant, but any amount over the requested amount should come from the Club or other sources and should be noted in the grant application. Separate grants from the same Club cannot fund the same project. However, up to four (4) clubs can partner and combine their grants into one project. District Grants are intended to fund short-term, more modest endeavors with total project budgets under $30,000. Projects with higher budgets should be financed by Rotary Global Grants.

Here are some general policies to keep in mind in working with District Grants in the 2024-25 Grant Cycle:

- Spending on projects cannot start until the Club receives funding from the District for the grant project;
- The checks must be deposited within two (2) weeks of receiving the District Grant check and before spending any funds;
- No reimbursements are allowed for funds spent prior to the deposit date;
- Checks shall be revoked if they remain undeposited after two (2) weeks; and,
- Approved projects must be completed with a final report submitted to the District Rotary Foundation Committee within 30 days of project completion but no later than March 1, 2025.

The District Rotary Foundation Committee will consider several factors in determining whether to award a grant and to what funding level an award will be:

- Completeness and accuracy of the grant application;
- Club matching contributions to the proposed project (min of 15%);
- Percentage of club members with direct, hands-on involvement in the project;
- Number of persons directly benefitted from the proposed project;

- The long-term impact on the affected community;
- The degree to which the project conforms to District 6200 guidelines for District Grants;
- The proposed project benefits those in greatest need;
- The Club is current on all grant reporting with the District and The Rotary Foundation;
- Completeness and accuracy of the grant application; and
- While not a requirement for a District Grant, the DRFC may also consider
  - The sustainability of the proposed project; and,
  - If the project fits within one of TRF's Seven Areas of Focus

ROTARY DISTRICT 6200
2024-25 GRANT CYCLE
CALENDAR OF IMPORTANT DATES

Please take note of the following calendar dates relating to the District 6200 Rotary Foundation Committee's training, receipt, evaluation, and awarding of Club District Grants for the Rotary Year 2024-2025.

Always Available	Grant Management Seminar online through Rotary International Learning Center – www.rotary.org Grant Management Seminar online through Rotary District 6200 Website – www.rotary6200.org
March 1, 2024	Final Reports for Club District Grants are due to the District Rotary Foundation Committee through DACdb/Club Grants
March 8, 2024	OMR PETS (President-Elects Training Seminar) – Distribution of information and explanation of the process which will be used to evaluate and award District Grants for the 2024-25 year
March 11, 2024	2024-25 Grant Applications – Open – Grants Module – DACdb/Club Grants
April 19, 2024	Rotary District 6200 District Conference – Grants Management Seminar - Gonzales
May 10, 2024	Deadline for submission of 2024-25 District Grant applications through DACdb/Club Grants
May 10, 2024	Clubs have entered 2024-25 TRF Annual Fund giving goals into Rotary Club Central
August 17, 2024	Club Engagement/Rotary Foundation Workshop – Location to be announced
January 25, 2025	Mid-Year Assembly – Location to be announced
March 1, 2025	Final Reports for 2024-25 Club District Grants are due to the District Rotary Foundation Committee through DACdb/Club Grants

Rotary Club of: Click or tap here to enter text.

Grant Project Name Click or tap here to enter text.

PLEASE READ AND CHECK (click) EACH STATEMENT THAT IS TRUE.
UPLOAD WITH COMPLETED FORM WITH YOUR DISTRICT CLUB GRANT APPLICATION.

Grant Application:
☐ Two (2) members of the club participated in a Grant Management Seminar.
☐ It completely describes the project, its location and objectives
☐ It explains the community need for the project, how it will improve the lives of the less fortunate
☐ It estimates the number of people who will benefit
☐ It explains how club members will be involved, beyond distributing or spending funds
☐ (For international projects) Communication and work responsibilities are described
☐ It explains how the project will proceed if only partial funding is available
☐ It lists at least two (2) club contacts
☐ A copy of Club's signed MOU is uploaded
☐ A copy of Club's signed MOU-Addendum is uploaded
☐ A copy of Club's signed Financial Management Plan is uploaded
☐ A copy of Club's District Grants Checklist is uploaded
☐ A copy of Cooperation Organization MOU from project partner(s) is uploaded and their roles are thoroughly explained
☐ A complete and itemized budget for the project is included or uploaded
☐ The project's timetable is included, we understand the deadlines and will timely submit reports
☐ The club president and president-elect have signed the application
☐ The club's TRF Annual Fund Goals have been entered in Rotary Club Center

The Rotary Foundation Terms and Conditions:
☐ The project supports service activities and humanitarian endeavors
☐ We will be responsible for overseeing funding and implementation of the project
☐ We will promote our club's involvement with appropriate signage, labels, PR, etc. which will comply with R.I policies
☐ We will not establish a permanent foundation, trust or interest-bearing account
☐ The project does not directly benefit a Rotarian, spouse, lineal descendant or ancestor
☐ The project doesn't duplicate an existing Rotary program; this project is a new club effort.
☐ This is not reimbursement for a project that is already in progress or already completed
☐ We are the primary sponsor of this project, not some other, non-Rotary organization
☐ We are not asking for funding to buy land or a building

☐ Our project involves a structure where individuals live, work or engage in some gainful activity

☐ Funds are for low-cost shelter for underprivileged families

☐ Funds will be used to construct the structure

☐ Funds will be used to renovate the structure

☐ Funds will be used to provide new services to the structure

☐ Funds will be used to upgrade the electrical or plumbing of the structure

☐ None of the funds will be used for salaries, stipends, or honorariums for project beneficiaries or individuals working for our project partners

☐ None of the funds will be used for travel expenses

☐ None of the funds will be used for post-secondary education activities

☐ The project will be considered sustainable as defined by The Rotary Foundation and will continue to function without Foundation funds.

☐ Our club agrees to adhere to all stewardship requirements set forth in the Club Memorandum of Understanding

☐ The project addresses one or more of Rotary's 'Seven Areas of Focus', if applicable

Reporting:

☐ We will submit a final report within 30 days of the project's completion but no later than March 3, 2023

☐ We will keep receipts for all expenditures and submit copies of receipts with Final Report

☐ We will submit independent financial audit results if requested by the District Rotary Foundation Committee

ROTARY DISTRICT 6200
CLUB MEMORANDUM OF UNDERSTANDING
2024-25 GRANT CYCLE

This document is the official Memorandum of Understanding (MOU) provided by The Rotary Foundation (TRF). It is an agreement between the club and its district to implement the financial and stewardship requirements in this MOU and to ensure proper implementation and management of the Rotary Foundation Global Grant Funds and District Grant Funds. By executing this document, the club agrees that it will comply with all Foundation and District requirements.

RI District 6200 has directed that clubs must be "qualified" to receive grant funds from the Rotary Foundation District Block Grant and each "qualified" club will be held responsible for implementing this club MOU. The sections of this MOU are:

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds

1. **Club Qualifications**
To participate in Rotary Foundation Global and Package Grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation and to send at least one club member to the district Grant Management Seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in Rotary Foundation District Grants. By completing these requirements, the club becomes qualified and eligible to participate in the TRF grant program.

   a. Upon successful completion of the qualification requirements, the club will be qualified for one (1) Rotary year.
   b. To maintain qualified status, the club must comply with this MOU, any additional district requirements, and all applicable TRF policies.
   c. The club is responsible for the use of funds for club-sponsored grants, regardless of who controls the funds.
   d. Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes.
   e. The club must cooperate with any financial, grant, or operational audits.

2. **Club Officer Responsibilities**
The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants.

Club officer responsibilities include:
   a. Appointing at least one club member to implement, manage, and maintain club qualifications.
   b. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices.
   c. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest.

3. **Financial Management Plan**
   The club must have a written financial management plan to provide consistent administration of grant funds.

   The financial management plan must include procedures to:
   a. Maintain a standard set of accounts, which includes a complete record of all receipts and disbursements of grant funds.
   b. Disburse grant funds, as appropriate.
   c. Maintain segregation of duties for handling funds.
   d. Establish an inventory system for equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities.
   e. Ensure that all grant activities, including the conversion of funds, comply with local law.

4. **Bank Account Requirements**
   In order to receive grant funds, the club must have a dedicated bank account that is used solely for receiving and disturbing TRF grant funds.

   a. The club bank account must:
      i. Have a minimum of two (2) Rotarian signatories form the club for disrobements.
      ii. Be a low- or non-interest-bearing account.
   b. An interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.
   c. A separate account should be opened for each club-sponsored grant, and the name of the account should clearly identify its use for grant funds.
   d. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.
   e. Bank statements must be available to support receipt and use of TRF grant funds.
   f. The club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.

5. **Report of Use of Grant Funds**
   The club must adhere to all TRF reporting requirements. Grant reporting is a key aspect of grant management and stewardship, as it informs TRF of the grant's progress and how funds are spent.

6. **Document Retention**
   The club must establish and maintain appropriate record keeping systems to preserve important documents related to qualification and TRF grants. Retaining these documents supports transparency in grant management and assists in the preparation for audits or financial assessments.

   a. Documents that must be maintained include, but are not limited to:
      i. Bank information, including copies of past statements.
      ii. Club qualification documents including a copy of the signed club MOU.
      iii. Documented plans and procedures, including:
         1. Financial management plan;
         2. Procedure for storing documents and archives; and
         3. Succession plan for bank account signatories and retention of information and documentation.
      iv. Information related to grants, including receipts and involves for all purchases.
   b. Club records must be accessible and available to Rotarians in the club and at the request of the district.
   c. Documents must be maintained for a minimum of five (5) years, or longer if required by local law.

7. **Method for Reporting and Resolving Misuse of Grant Funds**
   The club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the club that does not tolerate the misuse of grant funds.

Authorization and Agreement

This Memorandum of Understanding (MOU) is an agreement between the club and the district and acknowledges that the club will undertake measures to ensure that proper implementation of grant activities and proper management of Foundation grant funds. By authorizing this document, the club agrees to comply with all of the conditions and requirements of the MOU.

The undersigned agree to comply with all conditions and requirements of the MOU for Rotary year 2024-2025 and will notify Rotary District 6200 of any changes or revisions to club policies and procedures related to these requirements.

The typing of names in the signature blocks are intended to be electronic signatures.

Club President 2023-2024	Club President-Elect 2023-2024
Rotary Club of _____	Rotary Club of _____
Name: _____	Name: _____
Date: _____	Date: _____

1. **District Requirements**

   Clubs submitting applications for Rotary District Grants must be qualified by RI District 6200. The District has established requirements in addition to those established by The Rotary Foundation. To be eligible to receive grant funding Rotary District Grants, clubs in District 6200 must also:

   a. Appoint a Club Rotary Foundation Committee Chair and advise RI and District 6200 of the appointment and furnish contact information for the individual.
   b. Have at least two (2) members of the club participate in a Grant Management Seminar for this granting cycle. It is recommended that one of the members participating in the training be the Club's President-Elect (Incoming Club President).
   c. Be current on its Rotary International and District 6200 dues, and be in good standing with District 6200, Rotary International, and The Rotary Foundation.
   d. Clubs are encouraged to established and reported an Annual Fund giving goal to the District Rotary Foundation Committee Chair for the 2022-2023 Rotary year. This must be accomplished by using Rotary Club Central.
   e. The club agrees to publicize any District Grant Project it undertakes.
   f. Be current on all Rotary District Grant reporting requirements.
   g. Have the Rotary Club's President (2021-22) and President-Elect (2021-22) sign the Club MOU and this Addendum.

2. **Bank Account Waiver**

   The District will waive The Rotary Foundation MOU requirement to create and maintain a separate bank account for participation in a District Grant. This waiver does not apply to Rotary Global Grants. Compliance with the club's financial plan is required as per The Rotary Foundation's terms and conditions.

   a. Appointing at least one club member to implement, manage, and maintain club qualifications.
   b. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices.
   c. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest.

Addendum to MOU Agreement

The undersigned agree to the RI District 6200 Addendum to the Club Memorandum of Understanding for Rotary year 2024-2025.

The typing of names in the signature blocks is intended to be electronic signatures.

Club President 2023-2024	Club President-Elect 2023-2024
Rotary Club of _____	Rotary Club of _____
Name: _____	Name: _____
Date: _____	Date: _____

An Agreement between

The Rotary Club of _____ , Project Sponsor

And

_____ , Cooperating Organization

1. Subject

District Grant Project Name: _____

2. Definition

A cooperating organization is any reputable non-Rotary organization that provides expertise, infrastructure, advocacy, training, education, or other support for the grant project. Cooperating organizations must comply with all reporting and auditing activities required by The Rotary Foundation and Rotary District 6200, and provide receipts as requested.

3. Purpose

This document establishes an agreement between the parties listed above to implement a project funded by a District Grant from The Rotary Foundation and Rotary District 6200.

4. Project Objectives and Location

5. **Project Sponsor Responsibilities**

    The Project Sponsor will have the following specific responsibilities for the project:

6. **Cooperating Organization Responsibilities**

    The Cooperating Organization will have the following specific responsibilities for the project:

7. **Mutual Understandings**

All parties agree that:

a. The Rotary District Grant, if approved, will be awarded to the Project Sponsor.

b. The Project Sponsor will control and manage the Rotary District Grant.

c. The Project Sponsor will be involved in all stages of the project.

d. The Project Sponsor will have a grant project management committee responsible for managing the project on its behalf.

e. The Project Sponsor and the Cooperating Organization will abide by the Terms and Conditions for Rotary Foundation District Grants and Global Grants.

f. The Project Sponsor affirm that the Cooperating Organization is reputable and responsible and act within the laws of the project country.

g. All grant funds will be received and managed by the Project Sponsor and will not be managed by the Cooperating Organization.

h. Grant funds will remain in the designated Rotary Club bank account until they are needed to pay a vendor or reimburse a purchase.

i. All payments to vendors and reimbursements to the Cooperating Organization will be supported by receipts, paid invoices, vouchers, or written agreements.

j. The Cooperating Organization may contribute funds toward the project.

k. The Cooperating Organization project-related documentation may be subject to independent financial and operational review by The Rotary Foundation and Rotary District 6200.

l. In their separate club qualification memorandum of understanding, the Project Sponsor has agreed to:

- Ensure that all grant activities, including the conversion of funds from one currency to another, comply with local law,

- Ensure that the project adheres to The Rotary Foundation's stewardship measures and grant management practices,

- Ensure that all people involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest,

- Report to Rotary District 6200any potential or real misuse or mismanagement of grant funds,

- Cooperate with any financial, grant, or operational audits,

- Maintain a standard set of accounts, which includes a general ledger and a complete record of all receipts and all disbursements of grant funds,

- Disburse grant funds in accordance with the Terms and Conditions for Rotary Foundation District Grants and Global Grants,
- Retain bank statements to substantiate the receipt and use of grant funds,
- Retain grant documents in a location known by and accessible to the Rotary Club and Rotary District 6200 officers, and
- Retain grant documents for a minimum of five (5) years, or longer if required by local law.

8. **Conflicts of Interest**

Any real or perceived conflicts of interest must be disclosed to The Rotary Foundation and Rotary District 6200, in compliance with The Rotary Foundation's Conflict of Interest Policy for Program Participants in the Terms and Conditions for Rotary Foundation District Grants and Global Grants. This includes any instances of Rotarians acting as vendors or serving as trustees, directors, officers, or staff of the Cooperating Organization. If in doubt, any potential conflict should be disclosed.

Identify any real or perceived conflicts here:

9. Modifications

Modifications to this document will be made by mutual consent of the parties. A written modification, signed and dated by all parties and approved by The Rotary Foundation and Rotary District 6200, must be issued before acting on any changes.

10. Contact Information

Your privacy is important to Rotary International, The Rotary Foundation, and Rotary District 6200 (collectively, "Rotary") and the personal data you share with Rotary will only be used for official Rotary business, such as in the relation to the Rotary District Grant. Personal data collected on this form is subject to Rotary's privacy policy.

11. Authorizations

By signing below, the parties agree to the terms of this Cooperating Organization Memorandum of Understanding.

The typing of names in the signature blocks are intended to be electronic signatures.

Project Sponsor Authorization

Rotary Club of _____

Signature: _____   Date: _____

Name: _____   Title: _____

Postal Address: _____

Phone: _____   Email: _____

Cooperating Organization Authorization

Cooperating Organization _____

Signature: _____   Date: _____

Name: _____   Title: _____

Postal Address: _____

Phone: _____   Email: _____

Club Name: Click or tap here to enter text.

Club Number: Click or tap here to enter text.

Date Adopted: Click or tap to enter a date.

Our Rotary Club agrees to adhere to all Rotary Foundation bank account requirements as spelled out in the Club MOU and its Addendum, including the opening of a new bank account, with two (2) signatories, for each new Rotary Global Grant undertaken.

Our Rotary Club further agrees:

1. To maintain a separate, standard set of accounts, with general ledger which includes a record of all income and disbursements and receipts for all expenditures for each active grant project;

2. To disburse grant funds in a timely manner and directly to the entities as approved in the grant application;

3. To maintain separate statements of income and expenses, noting any interest earned and recoveries, so that such incremental dollars earned will be returned to TRF;

4. To perform monthly bank reconciliations;

5. To maintain an inventory system for control of any equipment or other assets purchased with grant funds and to maintain records of items purchased, produced, or distributed through grant activities in accordance with RI terms and conditions;

6. To ensure that all grant activities conform to local law;

7. To clearly define roles and separate duties for Rotarians handling grant funds;

8. To retain all original invoices, budgets, written correspondence, competitive bid proposals, RI project reports, bank statements, monthly bank reconciliations, grant application, emails, etc., in accordance with TRF policies and procedures for a period of five (5) years from the final report date, and as required by local, state, and/or federal laws;

9. To make such supporting financial and other documentation accessible for review by club members and audits as required by TRF, the District 6200 Rotary Foundation Audit Committee, and any bona fide regulatory governmental agency;

10. To plan for transferring the custody of the bank account(s) if necessary;

11. To fulfill TRF and District 6200 reporting requirements for the use of grant funds; and

12. To report suspected misuse or mismanagement for grant funds to District 6200's District Rotary Foundation Committee.

Club Name: Click or tap here to enter text.
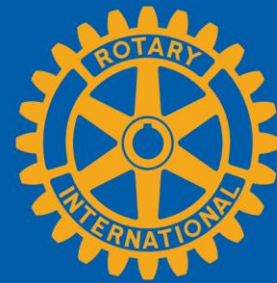
Club Rotary Foundation Committee ~ 2024-25

Chair

Name: Click or tap here to enter text.

Email: Click or tap here to enter text.

Phone: Click or tap here to enter text.

The Rotary Foundation Annual Fund Goal

Club's goal for Rotary year 2024-25: Click or tap here to enter text.

Important – Please Club is encouraged to set an Annual Fund goal and entered it into Rotary Club Central

Grant Management Seminar 2024-25 Grant Cycle

Club members who participated (as least two members)

Name: Click or tap here to enter text.

Name: Click or tap here to enter text.

Name: Click or tap here to enter text.

Name: Click or tap here to enter text.

HOW TO SET A GOAL
For club officers

FIND GOALS TO TRACK

Before choosing your club's goals, make sure the **appropriate year** is listed

If the **Edit** button appears, select it to find goals your club wants to track. If this button reads **Save** and goals are displayed, proceed to the next step.

Select the goals your club wishes to track by selecting the check boxes next to them

SET A GOAL

Enter a goal value in the box titled **Goal**

Select **Save** after you've entered a goal value

DACdb Grants Module
Club Process

<u>ENTERING YOUR GRANT</u>

- Clubs should designate the contact (also known as preparer) for the grant. You can have more than one contact.
- Clubs should add those who will be the signers of the grant. Check on your club's requirements as to how many signatures you will need.
- Log into the District Database (if you are higher than a level 4, make sure to use your club number when logging in.)
- Click on the My Club Tab

| Home | My DATA | My CLUB | DISTRICT | Help |

- Then Click on the Grants Icon

Club Grants

- Click on the Club Grants View on the left side menu

GRANT NAVIGATION
- Grant Overview
- Budget Overview
- Grant Dashboard
- District Grant View
- Club Grants View
- Grant Secure Files
- Admin
- Audit Club Signatures
- Reports
- Help
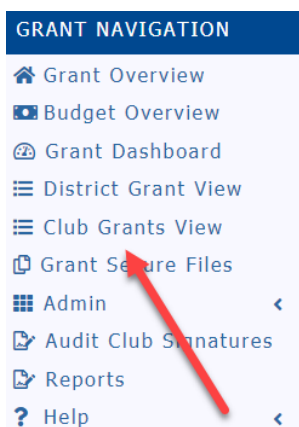
- Change Org Year to the year you are applying for.

Change OrgYear   **New Club Grant Request - Click Here to Create Grant**
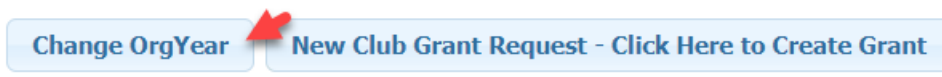
- Once the correct year is selected, click on New Club Grant Request

Change OrgYear | **New Club Grant Request - Click Here to Create Grant**
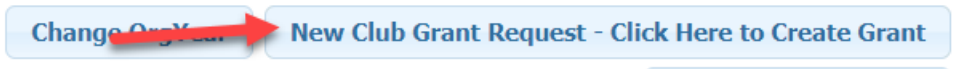
- There are four pages to complete on the New Grant Request
  - Details
  - Clubs Involved
  - Contacts
  - Application

Details | **Clubs Involved** | **Contacts** | **Application**
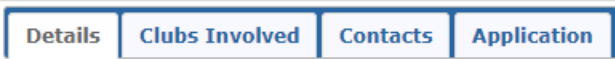
- Details
  - This page contains general information about the grant. Fill the page out completely.

Details | **Clubs Involved** | **Contacts** | **Application**

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

* Project Name:	Test Project
Priority:	High ▼
* Project Org Year: 0	2018-19 OrgYear can be changed by District (if needed)
* Round:	1 (e.g., 1 or 2)
* City:	Hollywood
* State:	CA
* Country:	US
Target Completion Date:	05/01/2018 📅 Target completion date for this project.
Area of Focus:	○ Promoting Peace ○ Fighting Disease ○ Promoting Clean Water, Sanitation and Hygene ○ Saving Mothers and Children ○ Supporting Education ⦿ Growing Local Economies ○ Other:
* Project Description:	Put a brief description of the project here

- Clubs Involved
  - Your club name will automatically appear here. If another club is working on the grant, select them from the list on left and use the arrows to move them to the right.
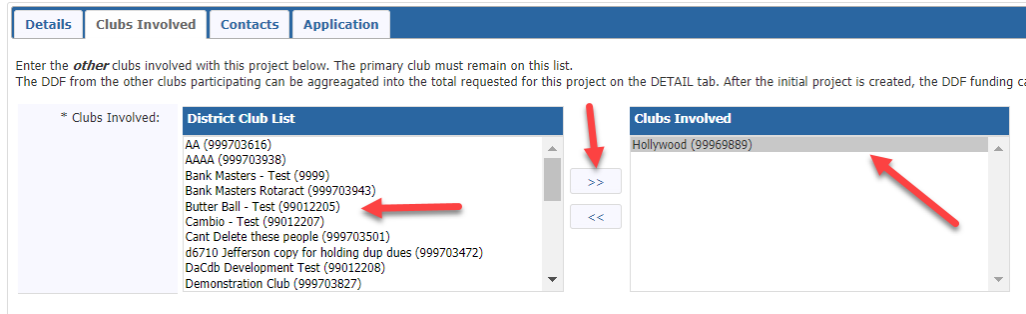
- Contacts
  - This is a list of the club members who will be working on preparing the grant and are responsible for collecting receipts, money, closure, etc. The person's name who started the process of the application will automatically appear on the right. To add others select them from the left column and move them over with the right arrows. Keep in mind, automated emails will be sent out and if "Contacts" is selected as recipients all the individuals listed will receive the same email.
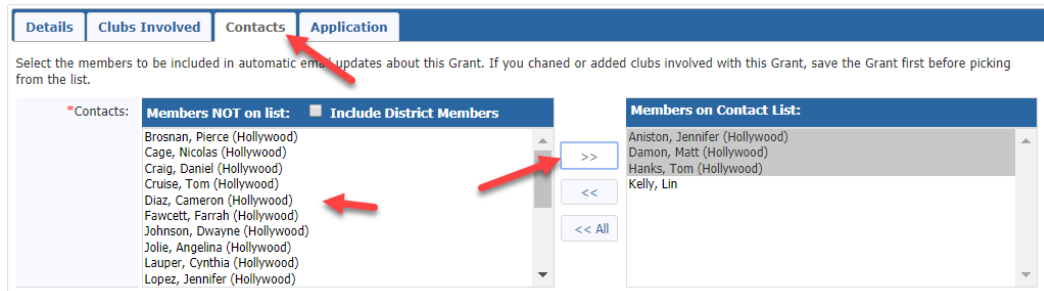
- Application
  - This page is the application itself. Some of this information is automatically transferred to the Final Report so watch your spelling and be very detailed here.

| Details | Clubs Involved | Contacts | **Application** |

Fill out the detailed grant application form below.

Grant Timeframe

*Start Date:
*Completion Date:

Address To Mail Grant Payment

*Name:
*Address:
*City:
*State:
*Zipcode:

Project Definition

*Describe the project objectives.

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

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

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

If the project involves a cooperating organization, please provide the name of the organization and attach a letter of participation in the documents section.

Club Statement Agreement

*This document is the ELECTRONIC APPLICATION defined in Section 2(d)(3) of the Memorandum ofUnderstanding (MOU) provided by the Rotary District for Clubs participating in the District Grant Program.It is an agreement between the Club and District 7770 explaining what measures the Club will undertake toensure proper implementation of District Grant activities and management of Rotary Foundation Grants Funds.By authorizing this document, the Club agrees it will comply with all Foundation requirements contained within the MOU executed during Future Vision Grants Management Seminars. Club MUST submit a Closing Report within 60 days of project completion.

☐ Yes, I Understand and accept the terms of the Club Statement Agreement.

Trustee Guidelines & Matching Grant Awards Terms & Conditions

*By signing this grant request, I confirm that our Rotary Club is requesting a District Grant in the amount above will be spent in accordance with Trustee approved guidelines and the Terms and Conditions of Matching Grant Awards. All of the information contained herein is true and accurate.
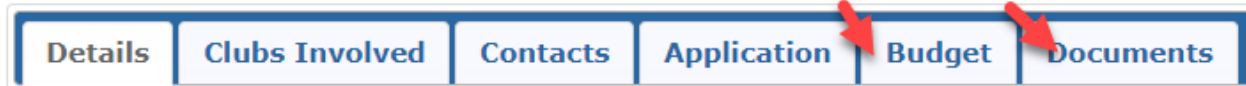
☐ Yes, I Understand and accept the terms and conditions.

- Once you have completed all four tabs, click on Save – You now have a draft grant

Save

- Once you click on "save", two new tabs will now appear on the top of the page, Budget & Documents.

Details	Clubs Involved	Contacts	Application	Budget	Documents

- Add your Income Items. Click on Add Income Source

Income Items   Add Income Source

Action	Item Name		Club		DDF	Amount		Created		Modified	
There is NO income source defined. Add the DDF amount being requested and other funding Income sources above.											
	Income Total:	0 out of 1 club(s) contributed				**$0.00**		(DDF Request: **$0.00**, Other Funding: **$0.00**)			

- A pop-up box will appear
- Enter Description
- Once you put DDF Requested Amount or Requested DDF amount put the amount in and make sure you select the Funding Source. So in this case you will select DDF Requested.
- If your District requires our club to spend an amount equal to your request, enter that amount as additional income enter those items but for the Funding Source click on Other Club Funding

Budget Item Entry

Enter the Grant funding information below. Specify if the funding source is coming from requested DDF funds or part of the club contribution.

Description: DDF Requested Amount

Club: Hollywood (99969889) ▼

Amount: 2,000

Funding Source: ● DDF Requested ○ Other Club Funding

The available DDF funding is shown below:

Club	DDF Alloc	DDF Used*	DDF Avail
Hollywood	0.00	0.00	0.00

* DDF Used reflects "funded" Grants, does not include Grants applications in progress

Cancel   Add

- Once you have your income added it will look something like this:

Details	Clubs Involved	Contacts	Application	Budget	Documents

Income Items   Add Income Source

Action	Item Name		Club		DDF	Amount		Created		Modified	
✎✗	DDF Requested Funds		Hollywood		✔	$2,000.00		Kelly, Lin 02/11/18 12:12 PM			
✎✗	Club Fund Raiser		Hollywood			$2,000.00		Kelly, Lin 02/11/18 12:13 PM			
	Income Total:	1 out of 1 club(s) contributed				**$4,000.00**		(DDF Request: **$2,000.00**, Other Funding: **$2,000.00**)			

- Expenditures should be itemized and include any estimated expenses for the project.
- Click on Add Expense

Expense Items

Action	Item Name ⬍	Club ⬍	Amount ⬍	Created ⬍	Modified ⬍
	Expense Total:		**$0.00**		

Add Expense

- Enter your description and amount, click on Add

Add Expense Item

Enter the Grant funding information below. Specify if the funding source is coming from requested DDF funds or part of the club contribution.

Description:	Stickers for Dictionaries
Club:	Hollywood (99969889) ▾
Amount:	150.00

Cancel   Add

- Continue to add your estimated expenses until expenses equal income sources.
- So, your budget should look something like this

Income Items

Add Income Source

Action	Item Name ⬍	Club ⬍	DDF	Amount ⬍	Created ⬍	Modified ⬍
✏✖	DDF Requested Funds	Hollywood	✔	$2,000.00	Kelly, Lin 02/11/18 12:12 PM	
✏✖	Club Fund Raiser	Hollywood		$2,000.00	Kelly, Lin 02/11/18 12:13 PM	
	Income Total:	1 out of 1 club(s) contributed		**$4,000.00**	(DDF Request: **$2,000.00**, Other Funding: **$2,000.00**)	

Expense Items

Add Expense

Action	Item Name ⬍	Club ⬍	Amount ⬍	Created ⬍	Modified ⬍
✏✖	Purchase of Dictionaries	Hollywood	$3,600.00	Kelly, Lin 02/11/18 12:21 PM	Kelly, Lin 02/11/18 12:25 PM
✏✖	Stickers for Dictionaries	Hollywood	$150.00	Kelly, Lin 02/11/18 12:24 PM	
✏✖	Juice and Cookies for students	Hollywood	$250.00	Kelly, Lin 02/11/18 12:24 PM	
	Expense Total:		**$4,000.00**		

Budget Summary

Description ⬍	Amount ⬍
Total Income (DDF+Club Funding):	$4,000.00
Expenses Items:	($4,000.00)
Cash Flow (Income - Expense):	**$0.00**

- If you have any letters of commitments, copies of quotes and other documentation, please upload them under the Document Tab. Signed MOU's can also be uploaded here.

- Click on the Documents Tab

| Details | Clubs Involved | Contacts | Application | Budget | Documents |

- Add documents by clicking on the upload file or add a folder and then upload files in the folder.
- You can also use the existing folders Documents and Images if you wish.
- To have the best results for the Final Report, upload your receipts and images as jpg or png.
- You can also add pdfs, excel, and word documents.
- When you name files please do not put in any special characters or you could incur a problem with opening the file.
- Also note the Grant Application is saved as an html file as your work through the process.

| Details | Clubs Involved | Contacts | Application | Budget | Documents |

The documents tab allows for management of all documents related to this grant.
🆕 To VIEW a file, click on the file name. The "View" link under the Action column has been removed for consistency in the User Interface.
DO NOT upload files with file names containing special characters (e.g., ",';:*%$@!). Rename your file locally and then upload it.

Upload File   Add Folder

Navigation: Home   D:\Rotary\SecureAccounts\9969\99969889\Grants\5071\

Action	Type	File Name	Modified	Size	Attributes
	📁	**Backup**	2018-02-11 11:59:41	0 KB	
ᴬʙ ✖	📁	**Documents**	2018-02-11 11:59:41	0 KB	
ᴬʙ ✖	📁	**Images**	2018-02-11 11:59:41	0 KB	
ᴬʙ ↩ ✖	📄	GrantApplication.html	2018-02-11 11:59:41	10 KB	
3 Directories | 1 File			Directory Space Used:	10 KB	

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

Select File: Browse_   No file selected.

Option: ☐ Replace file?

Cancel   Upload File

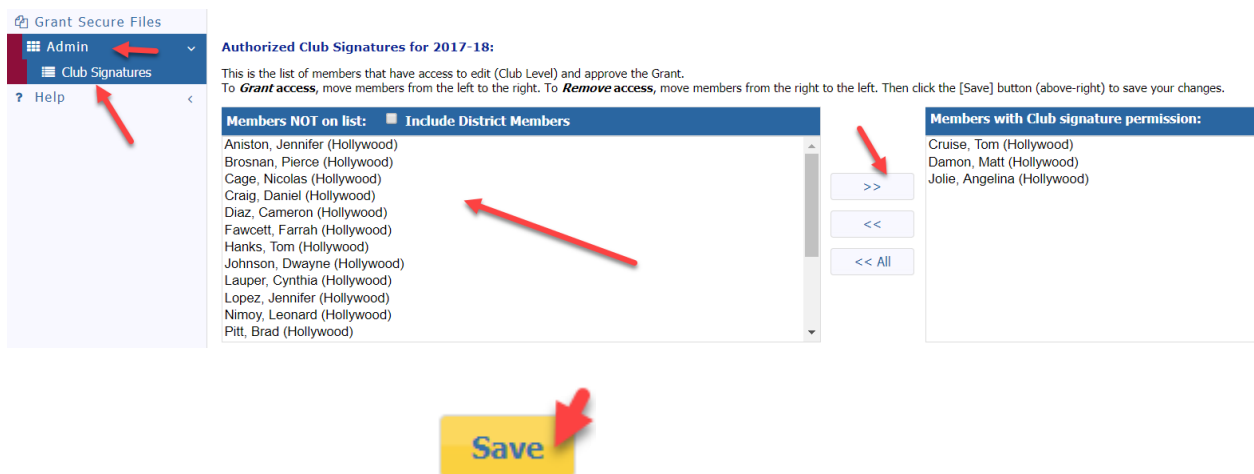- At this point, SAVE your grant. You can never save too often!

Save

- Once you complete your budget and add documents you will see two additional tabs – "Activity Log" and "Signatures.
- You can click on "Activity Log" to see what has been completed and "Signatures" to see where you are in the signing process. Once your grant is approved you will see the "Interim Report and the "Final Report" tabs. In most cases Districts do not require an Interim Report. Your District will advise you. The "Final Report" button will be used when you complete your project.

- Double check all your work before you collect the club signatures. You can always delete the grant at this point.

SIGNING & SUBMITTING A GRANT

- The District designates how many signatures from each club are needed. In this example, we are going to use two signatures required. If other clubs are involved with your grant, you need two signatures from each club.
- **The signers must be on the club signature list. Probably the President of your club will click on Admin on left menu bar and then Club Signatures.** Select the individuals from the left column and move them over to the right column. Then click on save.
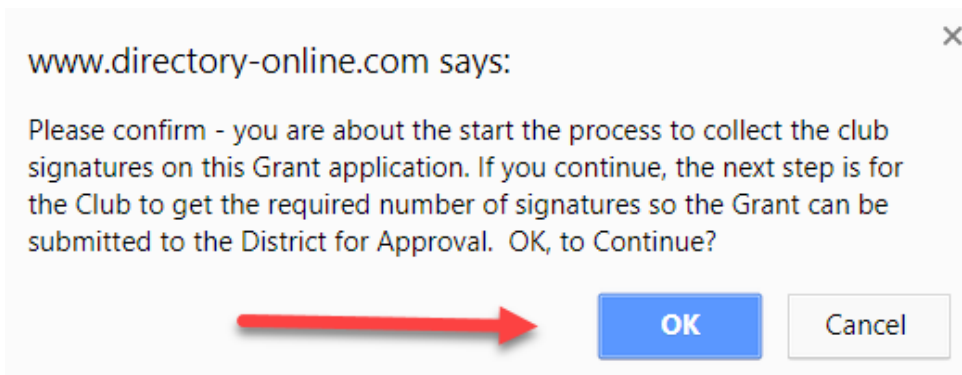
- Signer number one will click on edit grant (the pencil)

Club Process

☐	Actio	Project Name	⬧	Proj No	⬧	Lead Club Name	⬧	Status	⬧
☐	✏️ 📝	Test Grant		5071		Hollywood		Draft	
No Grants: 1									

- He/she will click on "Club: Collect Club Signatures"

Club: Collect Grant Signatures   Save

- The following message will appear

www.directory-online.com says: ✕

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?

OK   Cancel

- He/she will click OK. Two new buttons appear on the top right. "Club: Sign Grant Application" and "Revert to Draft".

Club: Sign Grant Application   Revert To Draft
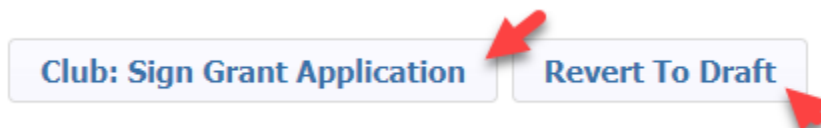
- Signer number one will now click on "Club: Sign Grant Application".

- A new box pops up – they will click on sign grant

Grant Signatures

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

Signed By	Club	Date

Sign Grant   Cancel

- The second signer is now ready to sign the grant application.
- Click on the edit pencil in front of the grant
- Click on "Club: Sign Grant Application" on top right
- The signature box will pop up, they will see the first signer's name in the box. They now will click on "Sign Grant"

Grant Signatures

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

Signed By	Club	Date
Damon, Matt	Hollywood	02/11/2018 01:10 PM

Sign Grant   Cancel

- The second signer will now click on the button "Submit Grant for District Approval"

Revert To Draft   Submit Grant for District Approval

Club: Sign Grant Application

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

District Review and Approval

	Action	Project Name	Proj No	Lead Club Name	Status
☐	✎ ✗ 📝	Test Grant	5071	Hollywood	Submitted Grant for District Approval

- 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.
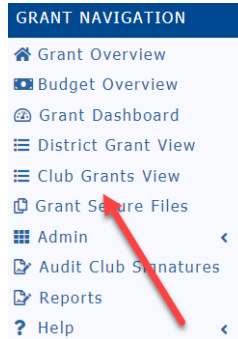
GRANT FINAL REPORT

COMPLETING THE FINAL REPORT

- Some Districts require an Interim Report. If your District requires one follow the same procedure.
- Once you have completed the project you must complete an on-line Final Report
- Go to the District Database
- Click on the My Club

- Click on the Club Grants Icon

Club Grants

- Click on Club Grants View on left side menu

GRANT NAVIGATION
- Grant Overview
- Budget Overview
- Grant Dashboard
- District Grant View
- Club Grants View
- Grant Secure Files
- Admin ‹
- Audit Club Signatures
- Reports
- ? Help ‹

- Click on the edit button (pencil) of the grant you wish to complete.

Approved

	Action	Project Name	Proj No	Lead Club Name	Status
☐	✏️ 📝	Test Project	4407	Bank Masters - Test Hollywood (*)	Approved Grant

No Grants: 1

- The grant status must say "Approved Grant" otherwise the Final Report will not appear
- First, click on the budget tab and make sure you replace the information with actual funds and expenses. You must itemize each receipt and copies of the receipts must be uploaded in the documents.

Details	Contacts	Application	Budget	Documents	Activity Log	Signatures	Interim Report	Final Report

- Scan photos of the project and rotary involvement, all receipts and copies of any checks you may have disbursed and save them as "jpg" or "png" files and upload them to the Documents tab.

Details	Contacts	Application	Budget	Documents	Activity Log	Signatures	Interim Report	Final Report

The documents tab allows for management of all documents related to this grant.
NEW To VIEW a file, click on the file name. The "View" link under the Action column has been removed for consistency in the User Interface.

- Click on the Final Report Tab

Details	Contacts	Application	Budget	Documents	Activity Log	Signatures	Interim Report	Final Report

We did not find an existing Final Club Report report to edit. A NEW Final Club Report report can be found below:

- Some Districts will only use the Final Report
- Complete items 2, 4, 5 and 6. Items 1 and 3 are filled in automatically. You cannot leave any of this information blank.
- Your photos and receipts will automatically appear under the photo and receipt section if you saved them under documents as a "jpg" or "png" file.
- The Final Report must be completed by one of the two individuals in the club who prepared the grant request and can only be signed by the Club Signees.
- When you are finished with the Final Report, click on the "Save Final Report" to save your work.

🔒 Grant Status: **Approved Grant** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. The Club needs to complete an Interim and/or Final report as required and submit for Club signatures and then District approval.

[Save FINAL Report]

- The two individuals designated as club signees will need to sign the "Final Report"
- After you save the final report the club signees are ready to sign it. The first Club Signer will click on the edit button, click on Final Report and click on "Club – Collect Final Signatures"

[Club: Collect FINAL Signatures]   [Save FINAL Report]

- A new button, "Club: Sign Final Report" will appear on the top right. Signer will click on the box.

Club: Sign Final Report

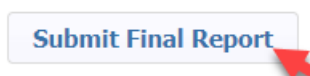A new box will appear, click on sign grant

Grant Signatures

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

Signed By	Club	Date

Sign Grant | Cancel

- The second signer of the Final Report will now go to the database and click on the pencil to edit the grant. Click on the Final Report tab and they will click on the "Club: Sign Final Report" button.

Club: Sign Final Report

- The sign grant box will pop up. You will see the signature of the first signee - click on "Sign Grant"

Grant Signatures

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

Signed By	Club	Date
Damon, Matt	Hollywood	02/11/2018 02:11 PM

Sign Grant | Cancel

- The second signer will now click on "Submit Final Report"

Submit Final Report

- The status of your grant will now be changed to "Submitted final report for District Approval"

	Action	Project Name	Proj No	Lead Club Name	Status
For District Review					
☐	✏ ✖ 📝	Hollywood Literacy Project	4389	Hollywood	Submitted Final Report for District Approval

- Depending on the District the Final Report will be reviewed, audited and/or approved.

GRANT FINAL REPORT
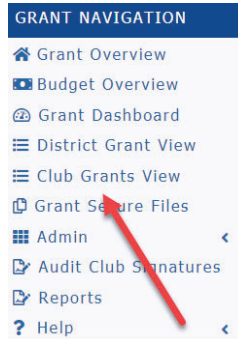
<u>COMPLETING THE FINAL REPORT</u>

- Some Districts require an Interim Report. If your District requires one follow the same procedure.
- Once you have completed the project you must complete an on-line Final Report
- Go to the District Database
- Click on the My Club

- Click on the Club Grants Icon
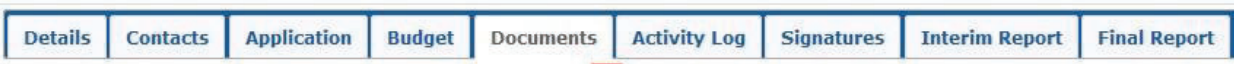

Club Grants

- Click on Club Grants View on left side menu

- Click on the edit button (pencil) of the grant you wish to complete.

Approved							
☐	**Action**	**Project Name**	⬍	**Proj No**	⬍	**Lead Club Name**	⬍	**Status**
☐	🖉 🗐	Test Project		4407		Bank Masters - Test Hollywood (*)		Approved Grant
No Grants: 1							

- The grant status must say "Approved Grant" otherwise the Final Report will not appear
- First, click on the budget tab and make sure you replace the information with actual funds and expenses. You must itemize each receipt and copies of the receipts must be uploaded in the documents.

Details	Contacts	Application	Budget	Documents	Activity Log	Signatures	Interim Report	Final Report

- Scan photos of the project and rotary involvement, all receipts and copies of any checks you may have disbursed and save them as "jpg" or "png" files and upload them to the Documents tab.

Details	Contacts	Application	Budget	Documents	Activity Log	Signatures	Interim Report	Final Report

The documents tab allows for management of all documents related to this grant.

NEW To VIEW a file, click on the file name. The "View" link under the Action column has been removed for consistency in the User Interface.

- Click on the Final Report Tab

Details	Contacts	Application	Budget	Documents	Activity Log	Signatures	Interim Report	Final Report

We did not find an existing **Final Club Report** report to edit. A NEW Final Club Report report can be found below.

- Some Districts will only use the Final Report
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- Your photos and receipts will automatically appear under the photo and receipt section if you saved them under documents as a "jpg" or "png" file.
- The Final Report must be completed by one of the two individuals in the club who prepared the grant request and can only be signed by the Club Signees.
- When you are finished with the Final Report, click on the "Save Final Report" to save your work.

Grant Status: **Approved Grant**   This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. The Club needs to complete an Interim and/or Final report as required and submit for Club signatures and then District approval.

Save FINAL Report

- The two individuals designated as club signees will need to sign the "Final Report"
- After you save the final report the club signees are ready to sign it. The first Club Signer will click on the edit button, click on Final Report and click on "Club – Collect Final Signatures"

Club: Collect FINAL Signatures   **Save FINAL Report**

- A new button, "Club: Sign Final Report" will appear on the top right. Signer will click on the box.

Club: Sign Final Report

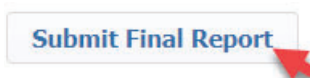A new box will appear, click on sign grant

Grant Signatures

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

Signed By	Club	Date

Sign Grant   Cancel

- The second signer of the Final Report will now go to the database and click on the pencil to edit the grant. Click on the Final Report tab and they will click on the "Club: Sign Final Report" button.

Club: Sign Final Report

- The sign grant box will pop up. You will see the signature of the first signee - click on "Sign Grant"

Grant Signatures

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

Signed By	Club	Date
Damon, Matt	Hollywood	02/11/2018 02:11 PM

Sign Grant   Cancel

- The second signer will now click on "Submit Final Report"

Submit Final Report

- The status of your grant will now be changed to "Submitted final report for District Approval"

- Depending on the District the Final Report will be reviewed, audited and/or approved.

Rotary District 6200
District Grant Resources
2024-2025 Grant Cycle

[Terms and conditions for Rotary Foundation district grants and global grants](https://my.rotary.org/en/document/terms-and-conditions-rotary-foundation-district-grants-and-global-grants-grants-awarded)
(https://my.rotary.org/en/document/terms-and-conditions-rotary-foundation-district-grants-and-global-grants-grants-awarded)

Club Memorandum of Understanding
    [Club Qualification Memorandum of Understanding](https://my-cms.rotary.org/en/document/club-memorandum-understanding)
    (https://my-cms.rotary.org/en/document/club-memorandum-understanding)

    [Club Qualification Memorandum of Understanding Worksheet](https://my-cms.rotary.org/en/document/club-qualification-memorandum-understanding-worksheet)
    (https://my-cms.rotary.org/en/document/club-qualification-memorandum-understanding-worksheet)

    [Club Memorandum of Understanding Resources](file:///C:/Users/gland/Downloads/club_qualification_mou_resources_en.pdf)
    (file:///C:/Users/gland/Downloads/club_qualification_mou_resources_en.pdf)

    [Club Memorandum of Understanding Frequently Asked Questions](https://my-cms.rotary.org/en/document/club-qualification-rotary-grants-frequently-asked-questions)
    (https://my-cms.rotary.org/en/document/club-qualification-rotary-grants-frequently-asked-questions)

[Cooperating Organization Memorandum of Understanding](https://my.rotary.org/en/document/cooperating-organization-memorandum-understanding)
(https://my.rotary.org/en/document/cooperating-organization-memorandum-understanding)

[Guidelines for Rotary Foundation-funded project signage](https://my.rotary.org/en/document/guidelines-rotary-foundation-funded-project-signage)
(https://my.rotary.org/en/document/guidelines-rotary-foundation-funded-project-signage)

[Six steps to sustainability](https://my.rotary.org/en/document/six-steps-sustainability)
(https://my.rotary.org/en/document/six-steps-sustainability)

[The Rotary Foundation online Grant Management Seminar](https://learn.rotary.org/members/learn/learning_plan/view/101/grant-management-seminar)
(https://learn.rotary.org/members/learn/learning_plan/view/101/grant-management-seminar)

[Slides from 2020-2021 District 6200 Grant Management Seminar](https://rotary6200.org/district-documents/?pagename=district-documents&folder=Grants%20Management%20Seminars&folder2=PDFs%20of%20Modules)
(https://rotary6200.org/district-documents/?pagename=district-documents&folder=Grants%20Management%20Seminars&folder2=PDFs%20of%20Modules)