Rotary Foundation
District 6540 District Grants
2025-26

Questions?
Contact Nanci Zehner
rotariannanci@gmail.com
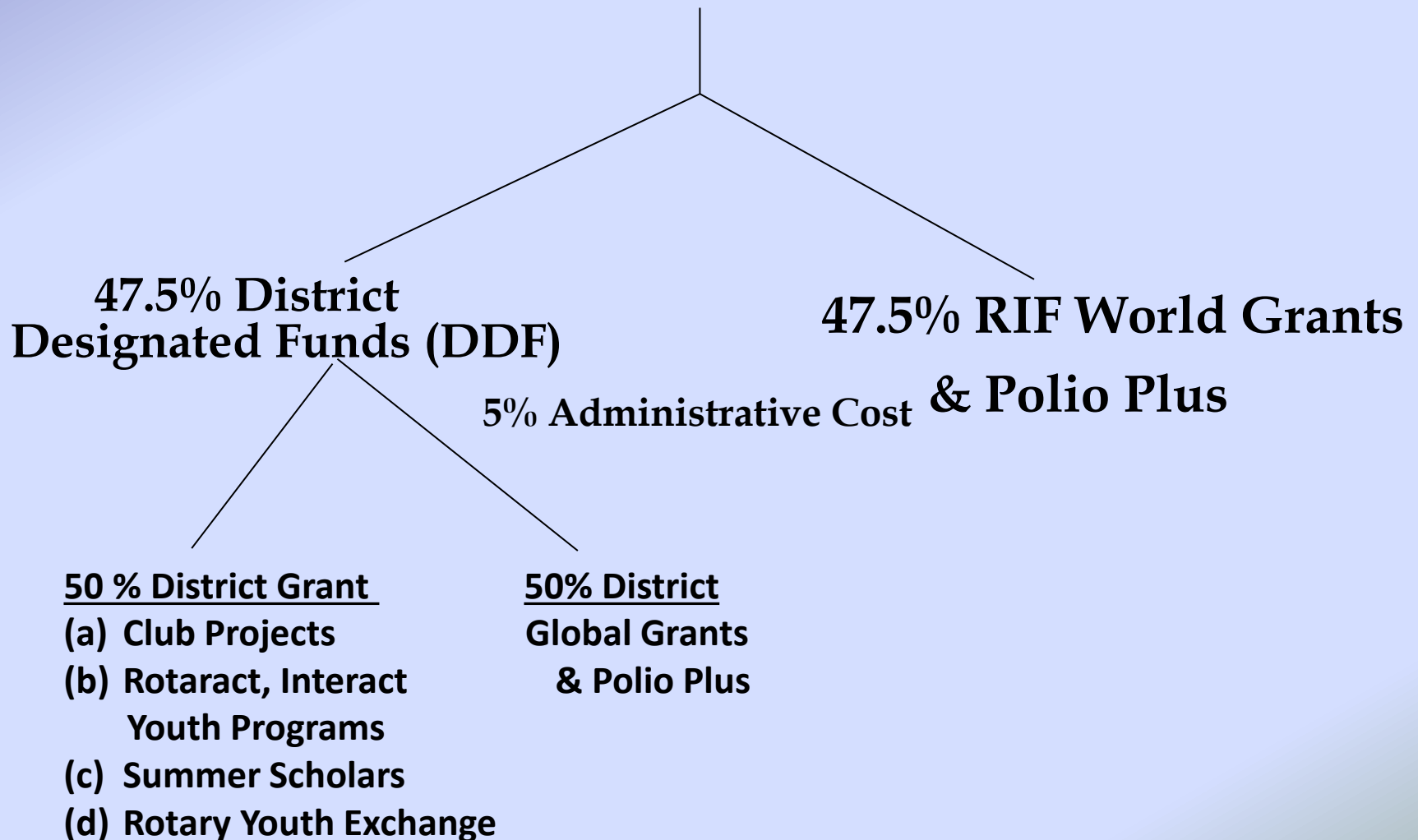574-360-3201

What Are District Grants

- Rotary Foundation Funds.
  ==These $$$ are not from dues, but from donations to the Annual Fund-Share==
- Each District sets its own rules for participation
- Projects are smaller and completed in a shorter timeframe (3-8 months)
- Projects (hopefully) will involve the active participation of the local Rotary Club
- Can be done in conjunction with another organization or club (see Multiple Clubs Guidelines)

Annual Fund-Share (3 years ago invested by RIF)

47.5% District Designated Funds (DDF)

5% Administrative Cost

47.5% RIF World Grants & Polio Plus

50 % District Grant
(a) Club Projects
(b) Rotaract, Interact
    Youth Programs
(c) Summer Scholars
(d) Rotary Youth Exchange

50% District
Global Grants
& Polio Plus

Key Points

- Max funding from District is $3,000. Actual amount based on club's per capita giving.
  - Per Capita > $100 = 100%
  - Per Capita $75-$100 = 90%
  - Per Capita $50-$75 = 80%
- Club must contribute at least 25% of the funding for the project.
  - Example: Funding from District is $3,000. Club funding must be at least $1,000 resulting in a project cost of $4,000.
- District grants operate as a reimbursement upon receipt of Final Report and expense report.

District Grant Cycle

Application Window – March 1 thru April 30

Application Review – As they are submitted, no decisions on funding until May

Preliminary Approval – May

Final Approval from RIF – June, 2025

Project Execution – July, 2025 through May, 2026

Final Report – When completed, no later than June 24, 2026

Payment to Club – Upon Approval of Final Report

Application Process

- Project must fall under one of the Foundation's 7 Areas of Focus (**Pick ONE**)
  - Economic Development
  - Education
  - Environment
  - Health
  - Saving Mothers and Children
  - Peace and Conflict Resolution
  - Water
  - Community Development

Application Review

- The Grants Committee reviews, asks questions, or requests revisions & gives preliminary OK

- We often have more requests than $ available – we will reduce request to match what we have

- Clubs that Give More Generously to the Foundation have Better Chance of Full Funding

Examples: Eligible Activities

- Conducting educational seminars
- Repair of existing buildings
- New construction in parks or public areas
- Purchase of equipment for organizations
- Food backpack programs
- Scholarships (no payments to individuals)
- Town Welcome Signs
- International projects

Examples: Ineligible Activities

- Purchase of Land or buildings
- Fundraising activities
- Expenses related to Rotary activities-conferences, anniversary celebrations, etc.
- <u>Unrestricted</u> cash donations to an agency
- Activities for an expense already paid
- Cost of Rotary Signage over $500
- Construction where money can be made (i.e., a business like a concession stand)
- Rotary cannot own any equipment purchased

ELIGIBLE PROJECTS	INELIGIBLE PROJECTS
Revolving loans/microcredit	Establishment of a foundation, permanent trust, or long-term interest-bearing account
Short-term rent or lease of buildings	Purchase of land or buildings
Construction of infrastructure such as service roads, wells, reservoirs, dams, bridges, latrines, toilet blocks, water supplies, and other similar structures	Construction or renovation of any structure in which individuals live, work, or engage in any gainful activity. This includes buildings, containers, mobile homes, or structures where individuals carry out any type of activity such as manufacturing, processing, maintenance, or storage, including provision of new services or upgrade of facilities
Purchase of equipment or appliances	Provision of plumbing or electrification inside buildings
Short-term and/or contracted labor for project implementation	Salaries for individuals working for another organization
Administrative expenses for project activities	Operating or administrative expenses of another organization
Primary and secondary education, tuition, transportation	Postsecondary education activities, research, or personal or professional development
Domestic travel	International travel (except Volunteer Service and 3-H Grants)
Detailed, itemized expenses	Contingencies, miscellaneous expenses
Assistance to land mine victims	Land mine removal
Publicity expenses such as newspaper fees, or printing of posters, brochures, or fliers to inform the community of an available service	Rotary signage (In excess of $500.00)
Vaccines and immunizations, if the project is consistent with the criteria, procedures, and policies of the PolioPlus program and World Health Organization	Transportation of vaccines or immunizations by hand over national borders
New Rotary-sponsored projects not already in progress or completed	Projects already undertaken and in progress, existing projects, activities primarily sponsored by a non-Rotary organization, or projects already completed
Maternal and prenatal health and education	Purchase and distribution of birth control devices and ultrasound equipment for use in sex determination
Budgeted and itemized humanitarian goods	Unspecified or cash donations to beneficiaries or cooperating organizations
Humanitarian or service activities benefiting a community in need	Fundraising activities, expenses related to Rotary events such as district conferences or anniversary celebrations or entertainment activities that do not include a humanitarian aspect
Secular, nonreligious activities that benefit a community in need	Projects that support purely religious functions at churches and other places of worship

Eligible Clubs

- Clubs must be current with RI and District dues
- Had at least 1 member attend training
- Because these funds come directly from the Rotary Foundation, Annual Fund Share giving plays a Role in decision-making
- Clubs with a three-year average giving of at least $50 per capita to the AF share are eligible to receive district grants – club presidents receive a copy of average giving each year
- Any club formed in the last five years will be exempt from the average giving requirement and will be eligible to apply for a district grant

Coordinate with Other Clubs

- Project too big for your club? Ask for Help
- Multiple clubs can submit grants for the same project
- Takes extra planning & coordination
- Financing gets more complicated
- Please talk to the Grant Committee <u>first</u> if you plan to submit a joint grant.
- Successful Multi Club Projects in past years:
  - Habitat for Humanity Playground—4 Clubs
  - Playground Equipment—2 clubs
  - Mobility Cycles—2 clubs

Plan Your Project

- ▣ Get two club members committed to project
  - ▪ Application – Signers/Contacts
- ▣ Plan the scope of activities
  - ▪ Application - Project Objectives
  - ▪ Application - Humanitarian Efforts
- ▣ Find ways to get Rotarians actively involved
  - ▪ Application – Active Rotarian Involvement
- ▣ Get cost and time estimates
  - ▪ Application – Budget Tab
- ▣ Coordinate with any municipal or other entities
  - ▪ Application – Cooperating Organization(s)
- ▣ Make a plan for Publicity
  - ▪ Application – Publicity Plan
- ▣ Have Contingency Plans if we can't fund your entire request

Conduct Your Project

- Don't Start before getting final approval
- Don't start before July 1
- Don't spend any money before July 1
- Save your receipts!!! Invoices <u>are not</u> receipts. Must show payment has been made, with copies of checks or credit card receipts.
- Try to run as many expenses through the club rather than individual members
- Do Fundraising if grant is less than expected
- If project goes over budget, can we get more Grant money? NO!

What if Things Change

- We want all projects completed by June 24, 2026
- Municipal Timeframes get Changed
- Key individual on project leaves
- Fundraising Falls Short
- CONTACT US EARLY IF THERE'S A PROBLEM
- We will work to try and accommodate changes
- May need to substitute another project
- May have to cancel grant

Email 2-3Pictures with Report

Getting Your Grant Funds

- District Grants operate as a reimbursement

- Be timely in preparing your final report

- Funds will be direct-deposited to Club's checking account in 2025-26. When completing the application, please enter your Treasurer's contact information in the section **Contact Person for Grant Payment.**

- Rotary allows only one District Grant year to be open at a time – meaning we can't get funds for the 2025-26 grant year if 2024-25 projects are still open. Your problems become all our problems.

Common Mistakes

- Income and Expenses don't match
- Buying Equipment, but no Rotary participation
- Incomplete set of receipts
- District Grant funds can only supply <u>75% of Project Cost. Clubs must fund at least 25%.</u>
- Starting the project too early – Wait until after July 1
- Providing **way too much detail** about project, both in the application and final report
- Make Grant Request for Round Amounts, i.e. $950 not $947.65. Final Reports should be exact.
- All applications must be submitted through DACdb.

Guidelines and Resources

- Grant Applications are now located on the My Club tab in DACdb

- Go under the **My Club** tab at the top of the DACdb page and click on the **Club Grants icon** to start the application process

- Please review the **Grants Overview** section before you start writing your 2025-26 grant!

- NOTE: A club officer **MUST** enter signatures before starting the Grant Application creation process

Creating Grant Application

- Click on *Club Grants View*
- Select *New Club Grant Request*
- Complete *Details*.
- CLICK ON SAVE!
- Add Contacts – We are asking for 3, preferably 4 contacts to be listed. You will be contacted if there are less than 3.
- Complete the application
  - List Contact Information for Club Treasurer under Address to Mail Grant Payment
- Click on both checkboxes at the bottom of the application
- CLICK ON SAVE!

Creating Grant Application

- Complete Budget Tab
  - Income Source #1 - District Funds (DDF)
  - Income Source #2 – Club Contribution (at least 25% of project total)
  - Budget Expense – General expenses categories
- CLICK ON SAVE!
- Click on *Collect Grant Signatures*
- If you are a signer, click on *Sign Grant Application*
- Second signer signs
- Submit Application for District Review