ROTARY FOUNDATION DISTRICT 6540 DISTRICT GRANTS 2023-24

Presenter
Sharon A. Kish
Valparaiso Rotary Club
District 6540 Grants Co-Chair
skish33@gmail.com
219-508-1516

The slides of this Presentation
are available
at
www.rotary6540.org
in the Downloads Section
A recording of this presentation will
Be uploaded to YouTube
Under Rotary District 6540

Rotary Foundation Grants

- Rotary Foundation Makes Two Types of Grants

  - **Global Grants** are for Large International Projects that involve the cooperation of Two or More Clubs and Districts from around the World (Minimum Budget is $30,000) – RI staff supervise grant

  - **District Grants** are intended to support the projects and efforts of local Rotary clubs in smaller sized projects (Max Grant in D6540 is $3,000) – District 6540 Rotarians supervise projects

Where Do the $$ Come From?

- It is a partial return of Contributions to the Rotary Foundation Annual Fund-Share from 3 Years Ago

- 50% comes back to District 6540 & 50% goes into the RI World Fund and is for global grants

- Of the returned funds, 50% is eligible to fund District Grants

- The other 50% is available to support Global Grant projects of our clubs and Polio Plus

- In an Average Year, we will have about $68,000 available for District Grant supported activities

What Are District Grants

- Rotary Foundation (NOT District) 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 (3-6 months)

- Projects (hopefully) will involve the active participation of the local Rotary Club

- Can be done in conjunction with another organization or club

What Do District Grants Support

- In addition to Club Projects, Grant Funds Support:

    - Interact, Rotaract, Earlyact
    - Rotary Youth Exchange
    - Summer Scholars – Scholarship Program
    - Rotaract Clubs can now apply for a District Grant in partnership with a Club

District Grant Cycle

Application Window – January 1 thru March 31

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

Preliminary Approval – May

Final Approval from RI – June

Project Execution – July through May

Final Report – When completed, no later than June 24

Payment to Club – Upon Approval of Final Report

Application Process

- Project must fall under one of the Foundation's 7 Areas of Focus
  - Water/Sanitation/Hygiene; Maternal & Child Health; Education & Literacy; Peace Building & Conflict Prevention; Disease Prevention; Community & Economic Development; Environment
- 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 $500.00
- Construction where money can be made (i.e., a business like a concession stand)
- Rotary cannot own any equipment purchased

Guidelines and Resources

- There are two important resources on the district website: www.rotary6540.org

1. Guidelines: Some do's and don'ts

2. Terms and Conditions for Rotary Foundation District Grants

- Please review before your start writing your 2023-24 grant!

Ineligible Clubs

- Clubs not current with RI or District dues are ineligible
- Because these funds come directly from the Rotary Foundation, Foundation giving plays a Role in decision-making
- Any Club with three year average giving of less than $50 per capita will not be 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 Projects in past years:
  - Habitat for Humanity Playground—4 Clubs
  - Playground Equipment—2 clubs
  - Zambia Water Truck – 4 Clubs

Plan Your Project

- Get two club members committed to project
- Plan the scope of activities
- Find ways to get Rotarians actively involved
- Get cost and time estimates
- Coordinate with any municipal or other entities
- Make a plan for Publicity
- Have Contingency Plans if we can't fund your entire request

Online E-Application

- Your Club Name (drop down box)
- Club Mailing Address
- Primary and Secondary Contacts Information
- 1a. Project Title
- 1b. Project Description
- 1c. Project Beneficiary
- 1d. Community Needs
- 1e. Area of Focus
- 1f. Estimated Project Start and Completion Dates

Application

- 2. Participating Organizations
- 3. Project Budget & Financing (use template)
- 4. Purchase of Equipment, Materials, Supplies
- 5. Conflict of Interest Statement
- 6. Publicity
- 7. Reports
- 8. Sponsorship and Authorization
- 9. Completion Checklist

Financial Template

ROTARY INTERNATIONAL DISTRICT 6540					
District Grant Finance form		Submitted By Club:			
		Name:			
		Address:			
		City:			State & Zipcode:
Grant Budget Breakdown	Use second tab if required				

	Item to be purchased	Name of supplier	Cost ($US or identify other)
			0
			0
			0
			0
			0
			0
	Sub Total - Detail Page 2		0
	Totals		0

	Funding Sources		Amount
1	Your Club:		0
2			0
3			0
4			0
5			0
6			0
7			0
8			0
9			0
10			0
11			0
12			0
13			0
	Sub Total		0
		Amount requested from District 6540 District Grant	0
		(Not to exceed $3,000.00) Cannot be more than75% of Budget	
	Total		0
		The Box to the right box should be green bfore you submit your grant	0

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 24th
- Municipal Timeframes get Changed
- Key individual on project leaves
- COVID Issues still affecting supply chains
- 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

Prepare Your Final Report

DESCRIBE WHAT WAS DONE	SHOW WHAT WAS SPENT	EMAIL COPIES OF YOUR RECEIPTS
WHEN TREASURER WRITES A CHECK USE MEMO AREA	MAKE SURE YOUR NUMBERS MATCH	SIGN THE REPORT

REVIEW AND SUBMIT THE FINAL REPORT TO SKISH33@GMAIL.COM

Individual Project Report 2023-24

Return this completed form to your Rotary District
Grants Chair, Sharon Kish skish33@gmail Do not send this form directly to TRF.

Rotary Club: _____
Mailing Address: _____
Project Title: _____
Progress report ☐   Final report ☐

Project Description

1. Describe the project. What was done, when, and where did project activities take place? If this is a progress report, what remains to be done?

2. How many people benefited from this project? _____

3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?

4. How many Rotarians participated in the project? _____

5. What did they do? Please give at least two examples, not including financial support provided to the project.

6. If a cooperating organization was involved, what was its role?

Financial Report (District must retain receipts of all expenditures for at least five years)

Currency Used: _____ Exchange Rate: _____ = 1 USD

7. Income

Sources of Income	Currency	Amount
1. District Simplified Grant funds received from the District		
2. Other funding (specify)		
3.		
Total Project Income		

8. Expenditures (please be specific and add lines as needed)

Budget Items	Name of Supplier	Currency	Amount
1.			
2.			
3.			
4.			
5.			
Total Project Expenditures			

(Note: Income must equal expenses)

Certifying Signature

By signing this report, I confirm that to the best of my knowledge these District Simplified Grant funds were spent only for eligible items in accordance with Trustee-approved guidelines, and that all of the information contained herein is true and accurate. I also understand that all photographs submitted in connection with this report will become the property of RI and will not be returned. I warrant that I own all rights in the photographs, including copyright, and hereby grant RI and TRF a royalty free irrevocable license to use the photographs now or at any time in the future, throughout the world in any manner it so chooses and in any medium now known or later developed. This includes the right to modify the photograph(s) as necessary in RI's sole discretion. This also includes, without limitation, use on or in the web sites, magazines, brochures, pamphlets, exhibitions and any other promotional materials of RI and TRF.

Certifying Signature _____ Date: _____
Print name, Rotary title, and club _____

⋯⋯⋯

To be completed by the Rotary District Grants Committee Chair:
District Simplified Grant # _____   Individual Project Report # _____

Email 2-3Pictures with Report

Getting Your Grant Funds

- We operate District Grants as a reimbursement

- Be timely in preparing your final report

- Funds will be direct-deposited to Club's checking account in 2023-24

- Rotary allows only one District Grant year to be open at a time – meaning we can't get funds for the 2023-24 grant year if 2022-23 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</u>
- Starting 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. $950.00 not $947.65. Final Reports should be exact.
- No handwritten applications or reports please

QUESTIONS ???

Sharon Kish
District Grants Chair
skish33@gmail.com
219-508-1516

The slides of this Presentation will be
available at
www.rotary6540.org
in the Downloads Section
A recording of this presentation will
Be uploaded to YouTube
Under Rotary District 6540

Thank you for Participating!!!