

DISTRICT 6710 GRANT GUIDELINES

1. The purpose of these guidelines is to encourage Rotary clubs and Rotarians in District 6710 to carry out local and international humanitarian service projects and educational initiatives. These guidelines are set forth to ensure stewardship and accountability for Rotary Foundation funds entrusted to D6710 Rotarians and to establish financial guidelines for oversight of Rotary Foundation funds.
2. Where a conflict exists or develops between D6710 guidelines and the policies, bylaws or rules of The Rotary Foundation (TRF) or of Rotary International (RI), the TRF or RI policy will apply.
3. All qualified* clubs are encouraged to submit an application in the DACdb Grants Module for *each* project proposed for the identified Rotary year between June 30 and August 31. **Clubs submitting multiple applications will rank them in order of priority.** The applications identified as first priority from the clubs will be reviewed by the District Grant Subcommittee as a group, prior to consideration of lower ranked application proposals. The Subcommittee will give first preference to qualified first priority applications submitted. If funds are still available, second priority applications will be reviewed. If there are still funds available after this step, third priority applications will be reviewed, and the process will be repeated until no further funds are available or there are no more valid applications.

The District Grant Subcommittee will give preference to applications from qualified clubs that:

- have projects which conform to District 6710 parameters for a District Grant;
- support the Rotary Foundation by donating to the Foundation's Annual Fund – SHARE program at higher per-capita levels;
- have significant, hands-on Rotarian involvement in the project;
- are proposing a new project different in kind from any the club has done in prior years;
- are current in all grant reporting;
- have a significant positive public relations plan; and
- present sustainable projects that have more than a short-term impact on their communities.

Clubs will be notified of approved applications by the District Grants Subcommittee Chair as soon after September 15 as possible.

*See "How to Qualify Your Club" on page 3.

4. In addition proposed projects:
 - a) Must adhere to the *Terms and Conditions for Rotary Foundation District Grants and Global Grants*. These documents can be found on the Rotary International web site.
 - b) Must promote Rotary Awareness in the affected community;
 - c) Must require active Rotarian involvement;
 - d) Must benefit at least six individuals except in the case of scholarships;
 - e) Must adhere to the fund management and stewardship guidelines as set out in the Club Memorandum of Understanding (MOU);
 - f) Must be short term in nature and completed within the current Rotary year.
 - g) May be carried out in any country including non-Rotary countries, with the exception of Cuba, Iran, North Korea, and any other countries precluded by TRF.
5. The District Rotary Foundation Committee will determine annually if it will offer any District Sponsored Programs and, if so, the Committee will establish the criteria for each. Examples of District Sponsored Programs include:
 - a) District Scholarships

- b) District Vocational Teams
- c) District Rotary Youth Leadership Awards (RYLA) programs
- d) District Grants for Attendance at Project Fairs

6. Funding of District Grants:

- a) District 6710 clubs will be held accountable for the fund management and stewardship guidelines as specified by the Club Memorandum of Understanding (MOU) and are responsible for providing the required reports within the timeframes specified. **District Designated Funds (DDF) will be disbursed when all required reports have been received and approved by the District Grants Subcommittee.**
- b) District Match: Clubs with over \$100 per capita giving to the Annual Fund Share (AFS) over the prior two years will be eligible for a match of up to 1.5:1. Clubs with per capita giving to the Annual Fund Share of less than \$75 will be eligible for a match of 0.75:1. All other District Grants will be eligible for a 1:1 match ratio.
- c) The District DDF match will be based on the first \$2,000 the club commits to the project, with a maximum district match of \$3,000 per project to eligible clubs. See part b above for match details.

Club Per Capita AFS Giving	Club Contribution	Maximum District Match (DDF)
Average Annual Fund Share Donation of prior two Rotary Years		
Over \$100	\$2,000	\$3,000
\$75 to \$100	\$2,000	\$2,000
Under \$75	\$2,000	\$1,500

- d) If a club's actual expenditure on a project is less than the amount forecast in the application, the District (DDF) match will be reduced to maintain the target ratio. Example: if your club is eligible for a 1:1 match, and your application calls for a \$2,000 club contribution, but the actual contribution is only \$1,800, then the District (DDF) match will also be reduced from \$2,000 to \$1,800.
- e) Bank Account: TRF requires that use of DDF be managed by a club in a separate and specified bank account. D6710 has waived this requirement for District Grants only, as noted in the D6710 Addendum to the MOU.
- f) Final Report: The project must be completed and the final report submitted by May 31st of the Rotary Year (unless an extension is requested and granted) or within 30 days of completion of the project. No further grant applications will be accepted if the final report is delinquent. The absolute final deadline for Reports is July 31st.

7. District Grants can be used for local or international projects.

Restrictions on Projects:

- ✓ The project must be used for a new club project to be completed within the Rotary Year.
- ✓ The project cannot be used as the basis to fund a Global Grant. Funds may be used for Global Grant assessments.
- ✓ Funds cannot be used for new construction, except as allowed by TRF guidelines.
- ✓ Funds cannot be used in support of fundraising efforts.

- ✓ Funds cannot be used for expenses related to Rotary events, such as conventions, conferences or entertainment activities. They **may** be used for youth programs such as RYLA, Interact, or Rotaract.
- ✓ Funds may not be used for cash contributions, unless in support of volunteer work being done by Rotarians in conjunction with another organization.
- ✓ Funds may not directly benefit a Rotarian, an employee of a club, district or other Rotary entity or of Rotary International.

8. The District Grants Subcommittee consists of the District Grants Subcommittee Chair, the District Governor, the Governor-Elect, the Governor-Nominee, the District Rotary Foundation Chair (DRFC) and up to five D6710 Rotarians appointed by the DRFC to three-year terms.

9. The District Rotary Foundation Committee reserves the authority to make exceptions to the policies laid out herein.

SAMPLE BUSINESS & FUNDING CYCLE OF DISTRICT GRANTS **A Six-Month Process**

Prior to the Rotary Year: Qualifying and Planning

How to Qualify Your Club:

1. Clubs currently not qualified must designate at least two club members to attend a Grant Management Seminar or complete the Seminar in My Rotary's Learning Center. Several seminars will be offered prior to the start of the next Rotary year.
2. Clubs currently qualified must send at least one representative to a Grants Management Seminar or complete the Seminar in My Rotary's Learning Center.
3. Execute (sign) both a Memorandum of Understanding (MOU) and a D6710 Addendum to the MOU between the club and D6710 and submit them to the District Rotary Foundation Chair no later than June 30th. **The current DRFC is Ralph Young → ralphyoung594@gmail.com.**
4. Be current on your club's Rotary International and District 6710 dues, and be in good standing with the District 6710, Rotary International, and The Rotary Foundation.
5. Be current on all tax returns for the Rotary Club and any associated Club Foundation.
6. Have established and reported an annual giving goal for the current year via Rotary Club Central, and have identified a Foundation Committee Chair for your club.
7. Be current on all Rotary Grant reporting requirements.

Clubs are encouraged to appoint a Club Rotary Foundation Chair to a three-year term. Qualification must be renewed annually.

Plan Projects and Apply for District Grants

Between June 1st and August 31st: Apply on DACdb's Grants Module for each project or program you wish to be matched with the District Block Grant in the Rotary year commencing July 1. The minimum District award for each grant is \$250, the maximum \$3,000. Clubs with multiple applications will rank them in order of priority.

In the Rotary Year: Implementation

As soon after September 15th as possible, clubs will be notified of District Grant Application decisions. If your club has not been notified by October 1, contact the District Grants Subcommittee Chair. The District Rotary Foundation Committee will seek to include uncommitted contingency funds in the District Block Grant. These additional contingency funds, if available, will be used to enable one-time unique projects to meet previously unforeseeable needs. These matching funds will also be available to meet unanticipated additions to existing district grant projects currently underway. All contingency expenditures require approval by the District Grants Subcommittee and The Rotary Foundation.

Prompt reporting of a change in the scope of a project or the completion of a project, with complete documentation of expenditures, is required before a club receives the funds committed to in the District Grant. If a project scope has been changed, submit an Interim Report on DACdb. The Final Report is due 30 days after the completion of the project, or by May 31, unless an extension has been requested and approved.

INSTRUCTIONS FOR SUBMITTING A DISTRICT GRANT APPLICATION

1. District Grant Application in the DACdb Grant Module must be completed on-line, approved by two club officers, and submitted for approval by the District Grants Subcommittee **between June 1 and August 31st**. District Grants are available between \$250 and \$3,000. See item 6c, above, for the schedule of matches available. If there are more than one application per club, they must be ranked in order of priority. Grants submitted cooperatively between two or more clubs may combine the \$1500 to \$3,000 limit available to each club, up to a maximum of three clubs. Thus, two clubs may seek a combined grant up to \$6,000, three clubs up to \$9,000. Active Rotarian involvement in project implementation will be expected from all participating clubs.

3. The District Grants Subcommittee will place applications received between June 1 and August 31st in separate categories determined by the priority ranking assigned by its club.

a) **Category One** will consist of all applications ranked first priority by clubs submitting more than one and considered as a group before any of the others. Funding will be earmarked for all the proposals in Category One that are approved. A Club that submits only one grant application therefore will be considered as Category One.

b) **Category Two** will consist of all applications ranked as second priority by the submitting club. Funding will be earmarked for all proposals in Category Two before lower-priority applications are considered. Additional grant requests will be considered subject to funds availability and club participation in the same manner: third-priority projects will be considered together, then fourth-priority, and so forth. In each case, exhaustion of the funds available will prevent consideration of lower-priority projects.

c) If there are more applications than funds available, the District Grant Subcommittee will evaluate them based on the listed criteria in item #4, using the evaluation matrix on the final page of this document. Grants of less than a full match may be offered at the discretion of the

committee, if valid applications in the lowest priority exceed the funds available in that category.

4. Clubs will be notified as soon as possible after September 15 whether their application(s) have been accepted and the amount of District funds allocated. Funds for grant projects will be committed by D6710 after the District 6710 Block Grant has been received from TRF. If you have not received notification about your request by October 1, please contact the District Grants Subcommittee Chair.
5. If an approved application is withdrawn, the District Grant funds earmarked for the project will go into the District contingency pool of dollars.
6. Grant amounts committed represent the maximum reimbursement the club can expect from the District for each project. If the total amount spent on the project is less than the original budget, **the District reimbursement will be reduced accordingly**. The club must “front” all monies spent on the project; the District grant is a reimbursement to the club, based on appropriate documentation (invoices and receipts) provided to the District.
7. The Rotary Foundation permits the District to set aside up to 20% of the total amount of DDF available for Grants as a contingency – in case of errors in receipt of applications, increases in project costs, or discovery of project opportunities that a) could not have been known before August 31 of the Rotary Year and b) represent unique, one-time opportunities to be of service. If you believe your club needs access to this fund, contact the District Grants Subcommittee Chair or District Rotary Foundation Chair.

District Grant Application Evaluation

Project: _____ Club: _____ Score: _____

Scoring			
Rotarian Involvement			
1 pt	3 pts	5 pts	7 pts
Only one or two members involved in the grant.	Several (3-5) members directly involved, others assist with PR, grant management, etc.	More than 5 members are actively involved; plus Interact, Rotaract, and/or Family members	At least 50% of Club members will be actively involved, plus Family, Interactors, and/or Rotaractors.
Per-Capita Support of the Rotary Foundation			
1 pt	4 pts	7 pts	10 pts
2-year average giving less than \$50 per member.	2-year average giving between \$50 and \$75 per member	2-year average giving between \$75 and \$100 per member	2-year average giving over \$100 per member
Public Relations Plan			
1 pt	3 pts	5 pts	7 pts
Little or no PR provided (e.g., only one press release to local newspaper)	Newspaper, social media, website	Newspaper, social media, website, sign (if applicable); frequent outreach to public during project	Has PR committee established for the project throughout its duration. Newspaper, radio, tv, social media, website, signs & more
Project new to club			
1 pt	3 pts	5 pts	7 pts
Club has done same project for more than 2 years	Club has introduced significant changes to prior project	Club is reproducing a project done by a club in a different community.	Club has put significant effort into researching a new project with important impact for the community.

Addendum – Managing Disaster Grants in DACdb

1. The purpose of this guideline is to outline how District 6710 will manage disaster relief/recovery grant projects through DACdb. These projects are funded by disaster relief donations to District 6710 from clubs in the district, clubs in this country, and from around the world.
2. These projects are separate and distinct from The Rotary Foundation (TRF) Disaster Relief projects. District 6710 shall follow the applicable ***Terms and Conditions for Rotary Disaster Response Grants***. The application, funding, and payment process shall not be applicable to the District 6710 process.
3. When entering a disaster relief project into DACdb, follow the process for entering any district grant. Make sure to check the **Disaster Relief** box in the Areas of Focus section.
4. If there is a Cooperating Organization involved, make sure to execute a Memo of Understanding (MOU) with the organization to outline how the project will be executed and what each organization's responsibilities will be.
5. On the Budget screen all the income funds will come from Other Club Funding (District Disaster Fund) not District Designated Funds (DDF).
6. Limit the expense items to general categories as best you can. A detailed itemization of expense items can be uploaded to DACdb in the Documents section.
7. Make sure that the Budget is balanced and that Income = Expenses.
8. Under the Documents tab, upload a copy of the MOU if applicable and other documentation for the project.
9. Once the project is entered, click on the **Club: Collect Club Signatures** box to authorize the grant application. Two (2) club approvals are required. The last signer for the club should assign the project to the district for approval. Three (3) approvals are required by the District Grant sub-committee. Members of the District 6710 Disaster Recovery Committee will be added to the approval list for District Grants.
10. Once the District approves the grant project in DACdb, the District Foundation Chair will request that the Treasurer prepare a check made out to the club. The check will be sent to the District Foundation Chair for a second signature and the District Foundation Chair will forward the check to the club.
11. When the project has been completed, the club will be responsible for preparing a Final Report in DACdb and uploading verification of expenditures outlined in the budget. Failure to submit a Final Report could result in District Grant funding being withheld the next District Grant year.
12. The District Grant Sub-Committee will approve all Final Reports in DACdb.

Addendum – Super Match Criteria

In order to recognize clubs with Rotarians that make significant contributions to the Annual Fund in any year, a Super Match category has been established. The Super Match criteria would be a 3:1 DDF reimbursement to any club district grant project up to a maximum of \$6,000 per project. The Super Match would be applied to District Grant applications submitted for projects 3 years after the contribution to the Annual Fund was made and have come back to the district from TRF.

The criteria for receiving Super Match DDF would be when clubs exceed \$1,000 per member giving to the Annual Fund in any Rotary year.

The Super Match would be applied to a maximum of two projects for clubs with over 100 members and one project for clubs with under 100 members.

The Super Match criteria for clubs under 100 members would be \$4,000 per project.

Here's an example.

In the 2022-2023 Rotary Year, a club with 140 members contributed \$283,387 to the Annual Fund or \$2,024 per member. Because these funds will come back to the district as DDF in the 2025-2026 Rotary Year, the club would qualify for the Super Match category for two projects for a maximum of \$6,000 per project that year.

If a small club were to qualify with 6 members, they would have to contribute more than \$6,000 to the Annual Fund to average greater than \$1,000 per member. They would qualify for one project to receive a Super Match of up to \$4,000 for one district grant project. Because 50% of the Annual Fund Share donations come back to the District for District Grants, a worst-case scenario would involve a small club receiving \$1,000 more in DDF than the amount that was contributed and returned. The breakeven point for the district will be a club with 8 members donating \$1,000 for each member. \$8,000 will go to the Annual Fund Share with \$4,000 being returned to the district in DDF funding three years later.