



## **Rotary District 7305 District Grant Application Document Package for 2023/2024**

Dear Fellow Rotarians,

We are pleased to report that a large number of clubs met the “Every Rotarian, Every Year” contribution level of \$100 per member in the last Rotary year. This is important for Rotary, important for the work we do, and qualifies a record number of clubs to receive district grants.

In the June 2021 “Rotarian,” Rotary Foundation Trustee Chair K. R. Ravindra discusses some of the challenges facing The Rotary Foundation and makes the point that as the demand for global grants grow, funding policies need to be adjusted in a prudent effort to balance demand with resources, so that more districts can participate. We have to do the same thing with our district grants.

We have about the same funding for grants this year than last year. Our goal is the same as Trustee Ravindra’s: To adjust funding policies in a prudent effort to balance demand with resources so that all qualified clubs can participate. To meet this demand, we are making these changes:

1. The reimbursement rate will be up to a flat 50%. This may be adjusted in accordance with demand
2. The maximum project size that we will participate in is \$10,000. Projects can be as large as a club can fund, but the district grant program will only recognize the first \$10,000 and apply the 50% reimbursement rate up to that figure. In short, unless otherwise advised, the maximum reimbursement we will be allowing is \$5,000. Again, this may be adjusted in accordance with demand
3. Clubs will be limited to participating in a single project using district grant funding. A club can undertake a project on its own or partner with another (or more than one) qualified club and apply for a joint district grant. When clubs take on projects jointly, they can combine their district grants towards a single project, i.e. two clubs in a joint project would be eligible for \$10,000 in district grants, three clubs \$15,000.
4. Training and certification will be given at various times throughout the district. A member of the club must complete the training and sign the Memorandum of Understanding (MOU) each year to be eligible for grants through The Rotary Foundation. These files and certifications will be kept on file with the District 7305 District Grants Committee

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## About District Grants

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District grants fund relatively small-scale, short-term activities that address community needs, locally or globally. The Rotary Foundation designates a fixed amount of money that each District can use for this purpose based on the amount of income generated from their Annual Fund and Endowment earnings. Your contributions to The Rotary Foundation play a major role in making these grants possible.

While the district grants committee manages the process, the rules and regulations are set by The Rotary Foundation. We are simply their agents and report to them on every individual grant application and are responsible to them to ensure that the projects are fulfilled as outlined in their approved grant applications.

Clubs need to be qualified in order to participate in the district grant program by virtue of their support of The Rotary Foundation and the completion of a training program by at least one member of the club. Applying clubs must have their District and International dues paid on a current basis and they must have no delinquent open final reports for previous Rotary funding of any type.

Projects funded by a district grant can neither incur nor commit to any costs before a written, formal stamp of approval is issued in the form of a final award agreement letter that is signed and returned to the district grants committee. Failing to return that signed form nullifies the grant offer. Similarly, we can only approve the payment of a grant after the club submits the reports, receipts, and accompanying paperwork to substantiate the funding stream of the project. All of this is archived in anticipation of a performance audit.

When the approved applications for grants total more than the available funding, grant offers are reduced strategically without prejudice or favoritism.

A district grant is a reimbursement-model grant, the applying club must be prepared to underwrite the entire cost of the project and upon conclusion, file a final report with full documentation which then generates payment of the District's share of the cost. Proposed projects may be for any dollar amount but the reimbursement level of each grant is topped off at the stated award level set in the final award letter.

For the 2023/2024 year, applications must be submitted no later than Thu, August 10<sup>th</sup>, 2023. The application is a .pdf fillable form and must be submitted electronically using .pdf technology. Handwritten, typed or scanned forms will be rejected out-of-hand. The district grants committee will offer assistance if needed.

Project time lines: By the time the applications are received and reviewed locally and then forwarded to Evanston for approval, at the earliest it will be late in September or early October before their approval will be received. At the other end of the process, projects must be completed and reported by June 30, 2024. The available eight-month span precludes undertaking summer projects.

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## About Funded Projects

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The kinds of projects that are funded by district grants are largely at the discretion of individual clubs but must fall within guidelines established by TRF and District 7305. For the most part, we're looking for new projects rather than repetition. Should you wish to repeat a previous project, your interests would be best served by checking with the committee before applying. (Some projects are considered District projects involving multiple clubs and are exempt from this requirement.)

Proposals that essentially pass grant money on to a third party without Rotarians having a real part in the project are less likely to be funded. As defined by RI, these are supposed to be Rotary Club projects which is why the final report will specifically ask how your club members were engaged in the project.

At best, only a small portion of a project's funding may be used for cash awards of any kind. An example of permissible use would be small awards at a spelling bee.

The following stipulations come from The Rotary Foundation:

- ✓ Grants must respect the wishes of the receiving community and strive to understand and appreciate their traditions and culture.
- ✓ Grants require the direct involvement of Rotarians to:
  - ✓ Access community needs and develop a project plan.
  - ✓ Establish a committee of at least two Rotarians to oversee the expenditure of funds.
  - ✓ Oversee grant funds.
  - ✓ Implement the project.
  - ✓ Provide evidence of community involvement and ownership.
  - ✓ Organize meetings with local service providers, local officials, etc. Promote the project in the local media.
- ✓ Projects must be initiated by the Rotary club making the application.
- ✓ Grant funds cannot be used for:
  - ✓ Construction or renovation of buildings where people will live or work.
  - ✓ Salaries, stipends, or honorariums.
  - ✓ Operating expenses of another organization.
  - ✓ Personal or professional development.
  - ✓ Reimbursement to clubs for projects started and/or completed before written approval.
  - ✓ District 7305 does not allow for the use of district grant funds for scholarships of any kind.

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## About Accountability & Grant Acceptance

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Accountability begins when applying for a grant. We expect clubs to be forthright in what their proposed project will entail, how it will benefit the community and the level of involvement that club members will have in the process.

Once the district grants committee makes a written offer to fund a grant, the 'deal' is not done until the written award form is signed and returned. The dollar figure that is on the acceptance form is the maximum that the club will be reimbursed regardless of the amount that was asked for in the proposal. The Club President needs to sign the acceptance paperwork and return it to the committee - generally, a photo of the signed document or an emailed scan.

**Without that final, written acceptance of the written award offer by the club President or Project Chair, there is no grant.**

The Rotary Foundation imposes strict reporting deadlines on the District so we too must impose strict reporting deadlines for our clubs. The final, complete report that triggers payment of the grant must be received on a timely basis as set forth by the district grant committee. If your project proposal indicates that the project will be over on December 15<sup>th</sup> and the committee specifies that the final report is due on or before February 1<sup>st</sup>, we expect to have the report in hand on February 1st. Please note, projects must be completed and reported by June 30, 2024.

Deadlines can be altered based on circumstances, but communication with the committee ahead of the fact is vital. Even if the project is not completed, the final report based on the status at the latest date is needed.

Should a club not be able to completely document its expenses or fails to file a report by our deadline, the grant might have to be canceled, leaving the club with the full responsibility of whatever expenses have been incurred.

Now, on to the application itself . . .

## Application Section: The Project

Sponsoring Club:		
Project Name:		
Projected Project Budget:		
Requested Grant Amount:		<i>The maximum amount you may ask for is up to 50% of the projected project budget. The final reimbursement will be no more than 50% of amount actually spent and accounted for.</i>
Project Chair:		
	Email:	
	Phones:	
	Address:	
Project Co-Chair:		
	Email:	
	Phones:	
	Address:	
Grant training member:		To qualify for a District Grant, a member of the club must take part in the grant training. The trained member can, but does not need to be the chair of the grant.

## Application Section: Co-Sponsoring Club

Co-sponsoring clubs must be qualified to apply for a district grant on their own. The total of requested grants for the project should be entered above. For the sake of clarity, specify in this block the amount of the total that this club is applying for as its portion of the total. Repeat in the notes section for any additional clubs.		
Club:		
Project Chair for this club:		
	Email:	
	Phones:	
	Address:	
Club Grant Portion:		
Grant training member:		

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## Application Section: Other Participating Organizations

If non-Rotary organizations are participating in this project, enter their names and submit separate details about their involvement along with correspondence confirming that organization's commitment.

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## Application Section: Project Details

### Proposed Project:

Present a brief overview of what the project's goals are, who it will reach, and what it will accomplish.

Your description is limited to what will fit in the entry field.

<p><b>Implementation Plan:</b></p> <p>In general terms, tell us how this project will be implemented.</p>					
<p><b>Ownership:</b></p> <p>Who will be the final owner of whatever results from this project?</p>	<p>[Note: It cannot be a Rotary Club, a Rotarian, or any entity controlled by the Rotary Club or its members.]</p>				
<p><b>Expenditure Plan:</b></p> <p>Give us an idea of the major items that you will be spending money on.</p>	<table border="1"> <thead> <tr> <th data-bbox="573 663 1154 716">Item Description</th> <th data-bbox="1154 663 1430 716">\$ Budget</th> </tr> </thead> <tbody> <tr> <td data-bbox="573 716 1154 915"></td> <td data-bbox="1154 716 1430 915"></td> </tr> </tbody> </table>	Item Description	\$ Budget		
Item Description	\$ Budget				
<p><b>Revenue Plan:</b></p> <p>Give us an idea of the major sources of income to fund this project..</p>	<table border="1"> <thead> <tr> <th data-bbox="573 915 1154 968">Item Description</th> <th data-bbox="1154 915 1430 968">\$ Budget</th> </tr> </thead> <tbody> <tr> <td data-bbox="573 968 1154 1167"></td> <td data-bbox="1154 968 1430 1167"></td> </tr> </tbody> </table>	Item Description	\$ Budget		
Item Description	\$ Budget				
<p><b>Start/Complete Dates:</b></p>	<p>Understanding that you can not start this project before you receive a final award letter, when do you foresee starting?.</p> <p>When do you foresee completing this project?</p>				
<p><b>Rotarian Involvement:</b></p> <p>How Rotary members will be directly involved in this project - how many, how often and doing what?</p>					

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## Application Section: Club Commitment & Memo of Understanding

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The President of the sponsoring Club is required to agree to the terms and conditions of the Rotary District 7305 District Grants program and attest that all information contained in this application is true and accurate, and that to the best of their knowledge this application meets the criteria as presented. It is also agreed that the final reports for this project will be submitted on a timely basis as established by the Grants Committee and it is understood that late reporting may be penalized by a reduction in the grant award. If reported beyond the final cutoff date, the grant may be entirely rescinded leaving the full financial responsibility to the club.

Furthermore, the Club agrees that it has reviewed the Rotary Memorandum of Understanding (MOU) and as the President of the Rotary Club, certifies that the club will adhere to the requirements listed in the MOU and will notify Rotary District 7305 of any changes to club policies and procedures related to these requirements.

Rotary Club:	
Club President for 2023/24:	
Electronic Signature:	
Date:	
Agreement:	Yes, I agree to all terms and conditions as noted

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## Application Section: Notations

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- Other than correspondence from “other participating organizations,” please withhold additional paperwork as the entries should be clear enough to convey what you want to communicate.
- To contact the Committee for assistance via email or with a telephone call, email the request to [jldklink59@gmail.com](mailto:jldklink59@gmail.com)
- When you download the application package, immediately rename the file to something that makes it identifiable as being from your club, i.e. braddock2324application.pdf. Be sure to save the application form again after the data entries have been made, print a copy for your records, and email the completed form to us at [jldklink59@gmail.com](mailto:jldklink59@gmail.com).
- Important: Be sure you receive an emailed confirmation of your submitted application within 48 hours of submission. If you don't receive one, it's likely the committee never received it and your submission will not be included in the final list.