

# DISTRICT 7600

## GRANTS MANAGEMENT SEMINAR

2020-2021

What is a District Grant?

Rotary



Rotary Opens  
Opportunities

# WELCOME

- ▶ DGE JUDY COCHERELL
- ▶ *DRFC STEPHEN BEER*
- ▶ *THE GMS TRAINING TEAM:*
  - ▶ *Rudy Garcia*
  - ▶ *Shel Douglas*
  - ▶ *Kevin Yeargin*
  - ▶ *Carol Woodward*

# ***THE ROTARY FOUNDATION GRANT MODEL***

- ▶ GLOBAL GRANTS
  - ▶ ***HUMANITARIAN GRANTS***
  - ▶ ***VOCATIONAL TRAINING TEAMS (VTT)***
  - ▶ ***SCHOLARS***
- ▶ DISTRICT GRANTS



# What is a District Grant?

- Small scale, short-term activities that address needs in your communities and abroad
- Same areas of focus as global grants
- In D7600, limit is \$5,000 per club or a five club aggregate of \$25,000 unless including Rotaract &/ or Interact Clubs (more on that later)

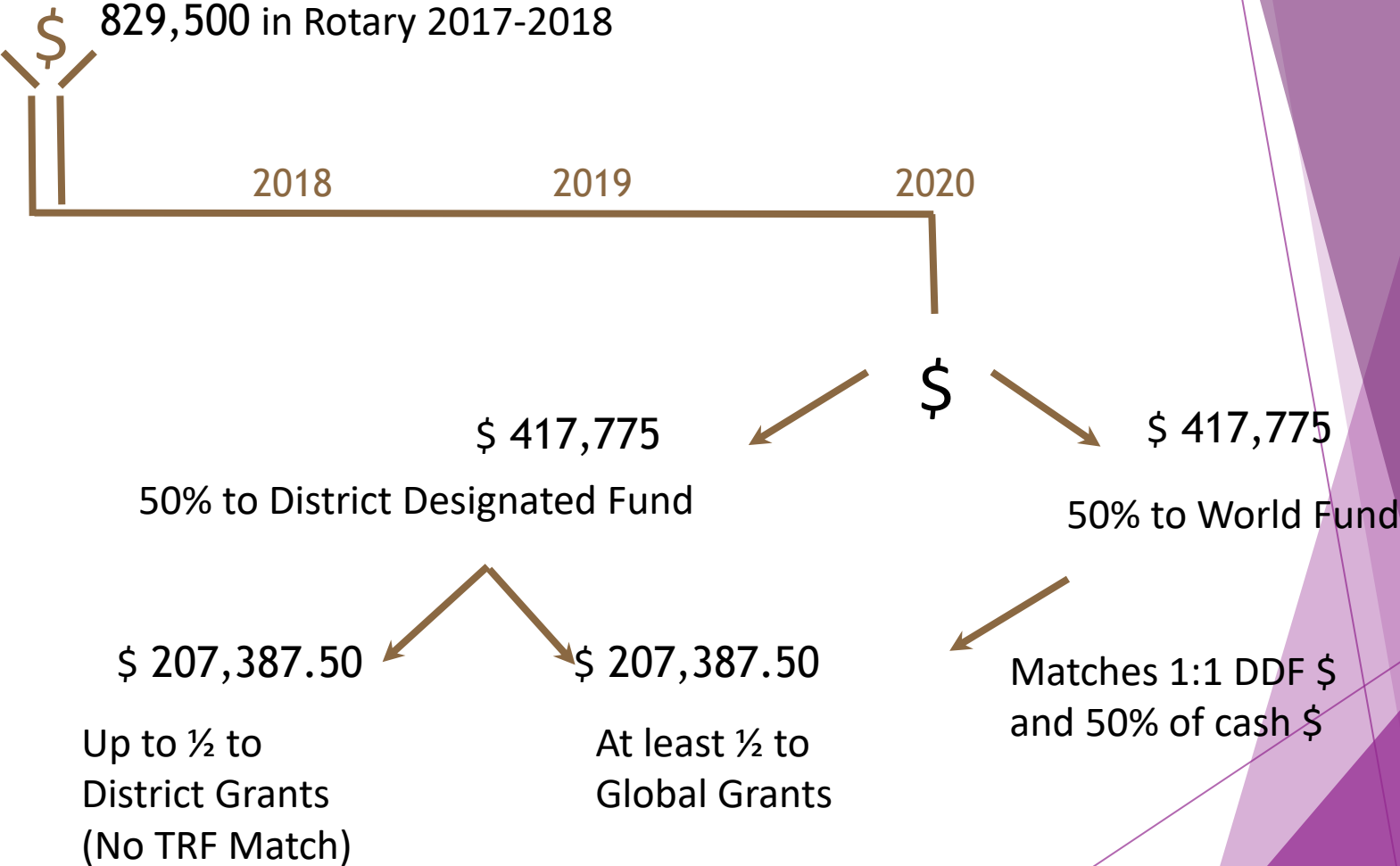
# Where Does the District Designated Funds (“DDF”) Come From?

- The DDF comes from the money the District contributed to the Rotary Foundation (TRF) three years ago (2016-17)
- 50% of the District’s contributions made three years ago are returned to District 7600 as DDF
- Up to 50% of the DDF can be allocated by District 7600 for District Grants

# What it Looks Like for the 2020-2021 Rotary Year

- During the 2017-2018 Rotary Year, District 7600 contributed \$829,550.00 to The Rotary Foundation
- Consequently, District 7600 will have access to DDF in the amount of \$417,775.00
- Therefore, District 7600 will be able to fund District Grants in the approximate amount of \$207,387.50 (an increase of \$53,950.23 from 2019-2020)

# Foundation Donation Flow



# New in 2020-2021 Rotary Year

## COVID-19 EMERGENCY GRANT

- **COVID-19** must appear in the grant's title
- Apply for a grant through the grants module on DACdb
- Grant must be approved by Foundation Team **BEFORE** Club spends their money
- COVID-19 Grants will be reviewed by the Foundation Team immediately upon submission
- Grants must include some active involvement of Rotarians and should include a public image component



# New in 2020-2021 Rotary Year

## COVID-19 EMERGENCY GRANT

- Must accommodate immediate community needs
- The Foundation is waving the requirement that clubs wait until the District Grant has been approved and funds are received. Clubs can spend the money now and receive reimbursement later this year *but wait until it is approved to spend \$\$\$\$*
- All of the requirements for the normal grant apply, except for early initiation of the project. So, for example, the maximum funds available for a club is \$5000. (Note: The \$5000 can be parceled into more than one grant. If a club uses its maximum of \$5000 for a COVID-19 grant, it will not be allowed to apply for a regular grant, too.)

# How Does a District get access to the DDF?

- The District solicits applications from the Clubs
- The Clubs submit the applications for District Grants no later than May 15<sup>th</sup>
- The District Rotary Grants Committee approves all or part of the submitted grants
- The District creates a Spending Plan that must be approved by TRF
- Once approved by TRF, the District Grant funds are released to the District as a block
- District 7600 disperses the funds pursuant to the approved Spending Plan

# What Each Club Must Do to Obtain a District Grant

- Each Club must execute a Memorandum of Understanding (“MOU”) AND upload the executed MOU(s) to DACdb
- The 2020-2021 Club President (current PE) must submit the club’s 2020-2021 Foundation Goals in Rotary Club Central by May 1, 2020

# What Each Club Must Do to Obtain a District Grant

- **Have at least one club member attend a Grants Management Seminar (“GMS”)**
- **Develop a project based on an identified “Community Need”**
- **Use the Grants Module in DACdb to apply for the Grant**

# District Grants Dos and Don'ts

- Do plan a budget :
  - \$5,000 limit per club/10% match
  - \$25,000 for joint projects/5 RC max (unless including Rotaract/ Interact Clubs)
  - Use Zero-based budgets and be sure to include estimates/documentation of requested expenses
- A primary emphasis this year will be on meeting community needs resulting from COVID 19 across the Rotary six areas of focus
- Do document how the project is sustainable or sustaining

# District Grants Dos and Don'ts

- *Do not* start the regular District Project before TRF approves the District Spending Plan- generally around August 1<sup>st</sup>
- Do complete final reports and maintain records for five (5) years
- Publicity, publicity, publicity! Do have a plan
- No repeat projects!

# District Grants: NEW in 2020-2021

- *Do CONSIDER PARTNERING with a Rotaract Club or Interact Club*
  - *\$2500 limit per Rotaract Club (2 Club max per project)*
  - *\$1500 limit per Interact Club (unlimited per project)*
  - *10% match required*
  - *All Clubs must be in good standing with RI RC & Rotaract Club must complete MOU RC must complete GSM; strongly encourage Rotaract to complete GMS*
  - *Lead RC completes Grant Module in DACdb*
  - *All Rotary Clubs have Foundation goals in by May 1<sup>st</sup>*

# Conflict of Interest Policy

- ▶ A conflict of interest occurs when someone is in a position to make or influence a decision about a grant or award that could benefit them, an immediate family member, a business partner, or an entity in which they, an immediate family member, or a business partner has a significant financial interest or in which any of them is a trustee, director, or officer.
- ▶ All actual or potential conflicts of interest need to be disclosed in your grant application. If you're not sure if there's a potential conflict, you should disclose it.



# The TOP 5 “TAKE-AWAYS”:

- ▶ **No “MOU” – No Deal!**
- ▶ **NO GMS-NO DEAL! ATTEND A GRANT MANAGEMENT SEMINAR**
- ▶ **GOALS NOT ENTERED BY MAY 1? NO DEAL!**
- ▶ **The application deadline is a hard deadline and it is fast approaching!!**
- ▶ **Pave the way for your successor by timely completing all reports for 20-2019-2020 grants – DUE MAY 1, 2020!**

**WAIT... WHAT??  
MY CLUB'S  
FOUNDATION GOALS  
MUST BE ENTERED BY  
MAY 1<sup>st</sup>**

**HOW DO WE DO THAT?**

# How to Report your Foundation Goals on My Rotary



Welcome to Rotary Club Central, the online tool for setting goals and tracking progress. Explore data and trends related to your club's goals on this page, and use the tabs to manage goals, project activities, and more. **Please note: data reported outside Rotary Club Central, including data reported in My Rotary, will be delayed for at least 24 hours.**

**District 7600**

### Membership Trends

Year	2014-15	2015-16	2016-17	2017-18	2018-19
July 1	2.8k	2.78k	2.75k	2.71k	2.69k

### Gender Trends

	2014-15	2015-16	2016-17	2017-18	2018-19
Female	653	665	645	670	673
Male	2.07k	2.08k	2.04k	2.01k	1.95k
Unreported	1	1	0	2	2

# How to Report your Foundation Goals on My Rotary



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The screenshot shows the My Rotary Goal Center interface. On the left is a dark sidebar with navigation options: Dashboard, Goal Center (highlighted), Global View, Service Activities, Resources, Reports, Club Ratings, Contact Us, and My Rotary. Below these are settings for Language. The main content area is titled 'Goal Center' and includes a club selection dropdown menu (circled in red) and a search bar. A yellow callout box points to the dropdown menu with the text 'Find your club in the drop down list'. Below the search bar, the current year '2018-19' is displayed with navigation arrows (circled in red), with a yellow callout box stating 'Make sure the appropriate year is listed'. An 'EDIT' button is highlighted with a red arrow and a yellow callout box that says 'Click edit to see the list of Foundation Goals'. The main content area displays a progress bar for '5 OF 27 ACHIEVEMENT' and a table of foundation goals.

	ACHIEVEMENT (USD)	OF	GOAL (USD)
<b>Annual Fund contributions</b> ▶ Show goal details and history	965		1,700
	As Of 26-Feb-19		
<b>PolioPlus Fund contributions</b> ▶ Show goal details and history	0		200
	As Of 26-Feb-19		

# Foundation Goals on My Rotary- DUE by **MAY 1st**



May 1st is the due date for clubs participating in grants

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Rotary Club Central

2019-20 County Goals

SAVE

	ACHIEVEMENT (USD)	OF	GOAL (USD)
<b>Annual Fund contributions</b> Show goal details and history	0		1,500
As Of 18-Sep-18			
<b>PolioPlus Fund contributions</b> Show goal details and history	0		2,000
As Of 18-Sep-18			
<b>Major gifts</b> Show goal details and history	0	✓ OF	0
As Of 18-Sep-18			
<b>Bequest Society members</b> Show goal details and history	0	OF	1
As Of 18-Sep-18			
<b>Benefactors</b> Show goal details and history	0	OF	1
As Of 18-Sep-18			

Identify your club goals for all 5 Foundation Goals

Be sure to Save

A large, light gray watermark of the Rotary International logo is centered on the page. The logo consists of a gear-like wheel with the word "ROTARY" at the top and "INTERNATIONAL" at the bottom. The text "QUESTIONS???" is overlaid on the center of the logo.

**QUESTIONS???**

A large, light gray watermark of the Rotary International gear logo is centered in the background. The gear has 24 teeth, and the words "ROTARY" and "INTERNATIONAL" are inscribed in the upper and lower arcs of the gear's inner ring, respectively. The background is white with purple geometric shapes on the right side.

Thank you for completing our  
1<sup>st</sup> ZOOM GMS training.  
Be on the lookout for a Survey  
Monkey to help us improve.