

DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL

D – DISTRICT GRANTS



The District Grants Subcommittee (DGS) manages, promotes and encourages implementation of the Rotary Foundation district grant. The subcommittee helps clubs participate in educational, vocational, and humanitarian activities utilizing district grant funds.

FUNDED FROM DDF

District grants are funded solely by DDF generated from a district's Annual Fund giving from three years prior, including Permanent Fund SHARE earnings. Districts can request up to 50 percent of their DDF each year. Any unused district grant funds are returned to the Foundation and credited back to the district's DDF balance. DDF will continue to rollover to a district's balance for the following year. Rollover DDF will not be used in the calculation of the district grant amount.

CAN BE UP TO 50% OF DDF

Districts can request up to 50 percent of their District Designated Fund (DDF) in one annual grant. Districts are responsible for administering the activities undertaken with these funds. They may disperse these grant funds at their discretion for district or club sponsored activities. In addition:

- All activities funded with district grant funds must adhere to the eligibility requirements set forth in the terms and conditions for Rotary Foundation grants.
- Districts must be qualified by the Foundation to receive district grant funds.

TYPES OF ACTIVITIES

Districts may support a broad range of activities with their district grant funds. Examples of potential district grant activities include:

- Local or international service projects as well as service travel or disaster recovery efforts
- Vocational training teams:
 - No partnership or international requirements
 - No restrictions on team size or length of training
 - Teams travel to either conduct or receive training
- Scholarships:
 - No restrictions on the level (secondary, university, or graduate), length, location (local or international), or area of study
 - No restrictions on the dollar amount for the scholarships

DISTRICT POLICIES AND PROCEDURES

The District Grants Subcommittee will recommend to the DGE the amount of DBG funding to request from the forthcoming year's DDF. The recommendation will be made no later than the May 15th proceeding the DGEs DG year.

The DGS will develop that recommendation in the following order.

1. The subcommittee will accept Club Project Grant (CPG) applications through May 1. The subcommittee will review and accept all applications that meet CPG qualifying criteria between May 1 and May 15.
2. If the amount of approved CPG applications does not exceed 50% of DDF the subcommittee will review any other proposals made to utilize district grant funds on a district wide basis. For example, 4-Way Speech Contest Scholarships, Vocational Training Exchange Teams, or other intra-district or inter-district projects. All such proposals considered must benefit the district as a whole and not benefit any individual club.
3. The District Grant application will be made online as soon as possible after May 15 to facilitate the receipt of funds on July 1.

CLUB PROJECT GRANTS

Club project grants are funded from the District Grant funds received from the Rotary Foundation. They are a tool for Rotary districts to support Rotary clubs within the district to implement short-term humanitarian projects that benefit the community. Rotary clubs can work collaboratively to implement a project. A project can be implemented within the district or can be implemented in another country. Clubs can use these grants to fund scholarships, support vocational teams, sponsor volunteer service, provide disaster recovery assistance, and carry out community and international service projects.

Club Project Grant Application Requirements

In addition to the requirements set out in the Rotary Foundation's *Terms and Conditions for Rotary Foundation District Grants and Global Grants* Club Project Grant applications must meet the following district specified requirements to be approved for funding.

- Clubs applying for Club Project Grants must be "qualified".
- CPG applicants can request club project funding from the District Grant funds in an amount up to 25% of the club's 2013-14 Annual Fund giving.
- CPG applicants cash contributions to the club project must match or exceed the amount of funding requested from the District Grant funds. Volunteer labor cannot be used towards satisfying this requirement.
- CPG projects must be humanitarian in nature and address one or more of the six Rotary Foundation Areas of Focus. The project cannot be simply a pass through of funds to another charitable entity.
- CPG projects must have direct involvement of Rotarians by:
 - Assessment of community needs and development of a project plan
 - Establishment of a committee of at least three Rotarians to oversee the expenditure of funds.
 - Oversight of grant funds
 - Maintain clear and accurate accounting of grant funds
 - Involvement in the implementation of the project.
 - Provision of evidence of community involvement and ownership
 - Organization of meetings with local service providers, local officials, and/or recipients
 - Promotion of projects in the local media
 - Reporting of project status and expenditure of funds to District 5830 – District Grants Committee. All supporting documentation and expenditures of the District Grant project

- must be kept by the club for period of five years after project completion and acceptance of the final report by the District Grants Subcommittee.
- CPG applications must be typed, signed and mailed or emailed (*in PDF or WORD format*) to the District Grants Subcommittee by May 1.
 - Applications should be submitted single-sided and unbound.
 - Handwritten applications will not be accepted.
 - Signatures are not required if the application is submitted via email with both signatories email addresses in the email address line.
 - Attachments should be used if space is not sufficient. Applications submitted by email will be considered signed if the email addresses of signatories are included in the cc: line of the message.
- CPG applications must include a detailed budget.

How and When To Apply

Applications will be received and reviewed during the following dates in any one Rotary year:

- For the Rotary year beginning July 1, 2016, the following dates shall apply:
 - January 1, 2016 to May 1, 2016 –club to prepare and submit its application paperwork to the District Grant Committee as directed below via e-mail or mail.
 - May 1, 2016 to May 15, 2016 – District Grant Committee will review submitted applications, contact the submitting club for clarification if necessary and award approved grants by May 15, 2016.
- Awards will be distributed by the District Treasurer within two weeks of the receipt of the District Grant funds from the Rotary Foundation.
- The Club Project Grant Application Package is available online at www.rotary5830.org.

Reporting Requirements

A final report is due within ***one month*** of the completion of the project to the District Grants Subcommittee. If the project is incomplete at January 15, 2017 an interim report is required. The project must be completed on or before May 1, 2017 and the final report must be received and accepted on or before June 1, 2017.

An interim report should provide the status of the project and projected completion date and actual and future expenditures against budget.

The final report is to provide photographs, media coverage and actual expenditure against budget. The club must submit receipts (matched against budget items) and an accounting of all expenditure of grant funds. Grant funds not used must be returned to the district. *All supporting documentation and expenditures of the Club Project Grant project must be kept by the club for period of seven years of project completion and acceptance of the final report by the District Grants Subcommittee.*

The Club Project Grant Report form is available online at www.rotary5830.org.

Failure to follow CPG requirements, failure to complete CPG projects or failure to file required CPG reports may disqualify the club from applying for future CPG and/or necessitate the repayment of CPG funds received.

TRF POLICIES AND PROCEDURES

District grants include no funding from the World Fund of the Rotary Foundation. As a result, the Rotary

Foundation demands less control over the qualification requirements, the application process and forms, and the grant management and reporting requirements than for global grants.

The descriptions of these requirements for Rotary year 2016-17 are listed below and shown in the next pages of this section.

5830 - 2016-17 Maximum CPG Request Amount

5830 - 2016-17 Club Project Grant Application – Requirements

TRF FORMS AND INSTRUCTIONS

The Rotary Foundation and District 5830 forms and instructions to be used for Rotary year 2016-17 are listed below and shown in the next pages of this section.

5830 - 2016-17 Club Project Grant Application

5830 - 2016-17 Club Project Grant Funding Transmittal Letter

5830 - 2016-17 Club Project Grant Interim Report

5830 - 2016-17 Club Project Grant Final Report