

2023-2024 Grant Management Seminar

**Barbara Kiernan
Grants Subcommittee Chair**

WELCOME

- Stewardship – Tereee Bergman, PDG
- District Grants – Kristi Halvorson, PDG
- Global Grants Overview – Barbara Kiernan & Pat Patton



Stewardship

Teree Bergman, PDG
2023-24 Stewardship Chair

Stewardship Elements

- Determine club eligibility for grants
- Ensure that clubs document their activities
- Ensure that records are retained



Qualification Requirements

- Clubs qualify annually
- Two members attend Grant Management Seminar
- Submit signed MOU
- Current on RI and District Dues
- Club president attended PETS

Learning Objectives

- What is meant by District Designated Funds
- How to qualify for Foundation grants
- How to properly manage a grant project

District Designated Funds

Credit at TRF that District 5500 controls

Can be used for:

- Global Grant Contributions
- District Grants
- Peace Centers
- PolioPlus

District Designated Funds, Cont.

- DDF comes from contributions from D5500 to Annual Fund 3 years earlier
- Usually around \$150,000, less this year
- 5% goes to administration
- 47.5% goes to District Grants (block grant cash)
- 47.5% D5500 can allocate to global grants, Peace Centers, PolioPlus

Qualification Requirements for 2023-2024

1. Two club members must attend and complete a Grant Management Seminar or have taken the online Grant Management Webinar. This includes the contact person for a District Grant
2. Your club president and president elect must sign a MOU. (For District Grants, the MOU signatures will be part of the District Grant Application).
3. Your club must be current in both D5500 and Rotary International dues.
4. Your club's president elect must have attended PETS.
5. Your club must have appointed a Rotary Foundation chair

Memorandum of Understanding Contents

- Club Qualification
- Club Officer Responsibilities
- Financial Management Plan
- Bank Account Requirements
- Document Retention
- Reporting Misuse of Grant Funds
- District 5500 Addendum

Memorandum of Understanding Contents

Go to the Qualification Webpage and download and fill out the District Addendum and sign the MOU.

E-mail the completed form to Stewardship Chair Teree Bergman at: stewardship@rotaryd5500.org

DISTRICT 5500 GRANT CLUB PRESIDENT CERTIFICATION FORM
2023-2024

Rotary club:

Club President Initials

Our club agrees to all the terms of the attached Club Qualification Memorandum of Understanding (MOU)

Two members of our Club have viewed the Grant Management Seminar in its entirety. Those members are:

1.

2.

Name of our club's designated Rotary Foundation Chair is:

The undersigned President confirms that all information contained in the District Grant Application:

Is true and accurate to the best of their knowledge;

That the club has agreed to undertake this project as an activity of the Rotary club;

That the club will comply with the required reporting and financial responsibilities outlined in this Application and The Rotary Foundation's Terms and Conditions for Rotary Foundation District Grants;

That a complete Final Report will be provided within 60 days of project completion and not later than May 1st. In the event the project is not completed by May 1st, a Progress Report will be filed along with a written request for an extension to a date certain.

Date:

Club President:

E-mail:

CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING
THE ROTARY FOUNDATION

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds

1. Club Qualification

To participate in Rotary Foundation global and packaged grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF) and to send at least one club member to the district's grant management seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in Rotary Foundation district grants. By completing these requirements, the club becomes qualified and eligible to participate in the TRF grant program.

A. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.

B. To maintain qualified status, the club must comply with this MOU, any additional district requirements, and all applicable TRF policies.

C. The club is responsible for the use of funds for club-sponsored grants, regardless of who controls the funds.

D. Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes.

E. The club must cooperate with any financial, grant, or operational audits.

2. Club Officer Responsibilities

The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants. Club officer responsibilities include:

A. Appointing at least one club member to implement, manage, and maintain club qualification

B. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices

C. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest

1

Accountability

- Proper financial management
 - Who can authorize expenditures?
- Document expenditures
 - **Keep receipts!**
- Inventory assets
- Separate records for grant monies



District Grants

2023-24 DISTRICT GRANT SUBCOMMITTEE

District Grant Co-Chair: Aleta Doroudian (Catalina)

District Grant Co-Chair: Audrey Toululian (Catalina)

**District Grant Subcommittee Member: Linda Howard
(Saddlebrooke)**

Contact Information: District Grant Webpage

Google: D5500 district grants

What is a District Grant?

- Small-scale, short-term club projects;
- Club must be qualified to participate (MOU and Grant Management training);
- Any District Grant from the prior year must have the Final Report approved;
- Must have active Club and Rotarian involvement in planning and execution of a project;
- Can be used for local or international projects;

What is a District Grant?

- Requires Rotary promotion of some sort on the project.
- Clubs are limited to one District Grant at a time.
- May not be used to fund vocational training teams, microcredit, or scholarships.
- May not simply write a club check to another organization.

What's CHANGING in 2023-24?

- Grants range from \$250 to \$4,000 in the first round, \$250 to \$2,000 in the second round.
- A new application process: apply online at D5500 in member section of ClubRunner.
 - All correspondence and notifications through ClubRunner
- Grant funds may be used to fund a prior project if the beneficiaries are new.
- Application deadline is extended to from July 1, 2023 to July 31, 2023.

What's CHANGING in 2023-24?

- **All** receipts for expenditures must be collected and retained.
- Faster process in getting checks to clubs after approval.
- The requirement of sustainability and needing to be in one of the 7 Areas of Focus is encouraged but not required.
- Although an international club may assist in a District Grant project, your club is the planner, driver and executor of the project.
- Extra documentation is required for an international project (form in ClubRunner & District Grant Webpage).

What's CHANGING in 2023-24?

- Primary Contact of a grant must have attended a Grant Management Seminar (can be considered one of the required two club members).
- We encourage Rotary clubs to use a competitive bidding process when selecting a major supplier if an item costs over \$2,000.

Timeline of Annual Fund Contributions

$\frac{1}{4}$ of Annual Fund comes back for District Grants

2020-2021

Year 1

**Contributions
to the Annual Fund**

2021-22

Year 2

**Funds
Invested**

2022-23

Year 3

**Funds
Invested**

2023-24

Back to D5500

**District Grant
Funds**

2023-24: \$49,775

Parts of a District Grant

Key Areas on the Application:

- Project Description
- **Start and Stop Dates**
- Rotarian Participation
- Club Contact
- **Cooperating Organization Letter/Email**
- **Budget** (Sources of Funds & List of Items to Buy)
- Details on any Rotary Promotion

First Round: JULY 2023

Second Round: SEPTEMBER 2023

Applications - How to Apply on Clubrunner?

**Complete instructions, a 10 minute video and FAQ will be
on District Grant webpage
Google: D5500 District Grants**



Grants[▶ View Club Grants](#)[▶ Submit a Grant Request](#)**Help**[▶ Grants Module](#)

Submit a Grant Request

Please enter the basic information relating to your Grant Request below.

If you are submitting a grant request on behalf of multiple clubs, you only need to submit this form once, and there must be one main sponsoring club. Enter the estimate budget requested at this stage; you will be able to refine this number later on in the application process once this initial request has been submitted and reviewed.

Note that you will need to be a certified member in order to submit a request. If you do not have the proper access, please contact the District Grants committee.

Project Details

Project Name: *

Please select the year this project will be completed. Once selected, the year cannot be changed.

Project Year: -- Select Year -- *

Country: United States ▾

State: Select State ▾

Zip Code:

City:

Description: *

Estimated Budget:

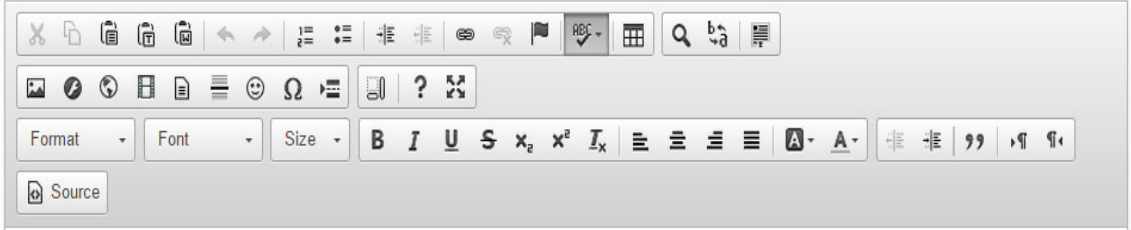
[Cancel](#)[Submit](#)

Grant Application

Detail **Application** Budget Documents Project Overview Individual Project Report Activity Log

▼ General Description

Describe the project and the problem or need it will address, including the intended beneficiaries and how the project will benefit the community in need. Provide the estimated length of time needed to complete the project. [Edit Help Text](#)



Source

**THE DISTRICT GRANT SUBCOMMITTEE
WILL BE AVAILABLE TO HELP YOU AND
ANSWER ANY QUESTIONS.**

Grant Application

Community Assessment & Impact

Describe how the benefiting community has been determined and what impact will be made by this project after grant funding has been fully expended. [Edit Help Text](#)

This is where you input the details of your grant.

body

Update

Community Assessment & Impact

Sustainability

Cooperating Organizations

Implementation Plan

Complete, but brief is good. Make sure you update as you move to another section.

Budget

Expenses must match Income

[Details](#) [Application](#) [Budget](#) [Documents](#) [Project Overview](#) [Individual Project Report](#) [Activity Log](#)

Expected Expenses

List all anticipated expenses for this project, including those that will be funded outside of the District grant portion.

Description	Supplier	Local Amount	Currency	Tax	Total	Amount
Sand, gravel, plants, shrubs	Local suppliers - donations	\$600.00	CAD	\$0.00	\$600.00	\$487.80
Construction material for Gazebo, Planters, Benches & delivery exchange rate 1.23	Sunbury Cedar, Surrey	\$5,338.07	CAD	\$0.00	\$5,338.07	\$4,339.87
					Total:	\$4,827.67

Expected Income

List all anticipated income for this project, including funds that will be contributed by the club, other partners and the District grant portion.

Description	Funding Source	Amount	%
Local suppliers, club member donations	Club/Other	\$487.80	10.10 %
Coquitlam Sunrise	Club/Other	\$2,339.87	48.47 %
District 5050	District Grant	\$2,000.00	41.43 %
		Total:	\$4,827.67 100.00 %



Documents Tab

Project Total Budget: \$4,000.00
Project Total Financing: \$4,000.00
Requested Grant Amount: \$2,000.00

[Cancel Grant](#)

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived

Click on any of the tabs below to access and update the various sections of this Grant application. [Edit Help Text](#)

[Details](#) [Application](#) [Budget](#) **[Documents](#)** [Project Overview](#) [Individual Project Report](#) [Activity Log](#)

Project Documents

Attach all related documents and files. [Edit Help Text](#)

Search: [Go](#) [Add Folder](#) [Add](#) [Add Multiple](#) [Download All](#)

Documents and folders are sequenced alphabetically. Drag and drop to change the document and folder structures.

Collapse All	Expand All		
Name	Uploaded On	Uploaded By	Actions
Collapse All			
Expand All			

Additional documentation and quotes are uploaded here, and any photos and receipts upon completion.

Project Completion Tab

Documents

▸ District Grant Documents

Settings & Customization

▸ Edit Notifications

▸ Message Templates

▸ Settings

Help

▸ Grants Module

Details

Application

Budget

Document

Project Overview

Individual Project Report

Activity Log

Click on the Print button to obtain a hard copy of this Grant application and all associated information.

☐ Include activity log

Print

PROJECT DESCRIPTION

This is a General description of the Grant project. Outline in detail the humanitarian need your project will address, the intent of the project, how the project will be implemented, and how Rotarians will be directly involved in the project. Note that the Estimated budget is only the initial grant request amount; to outline details on the various budget items, including those from other funding sources, go to the Budget tab.

Grant Project: School Kitchens

Primary Sponsoring Club: Rotary Club of Coquitlam Sunrise

Contact: Fitzpatrick, Jim

Date Submitted: Nov 05, 2013 at 5:29 PM

Project Total Budget: \$13,000.00

Grant Budget: \$13,000.00

Project Expected Income: \$13,000.00

Grant Expected Income: \$3,750.00

This will produce a PDF you can print, so you can share the application with your club

Individual Project Report Tab: FINAL REPORT

Click on any of the tabs below to access and update the various sections of this Grant application. 

Details Application Budget Documents Project Overview **Individual Project Report** Activity Log

Print

Submit

Project Description

Has your President posted your club Foundation giving goals on the RI website? Please enter your answer above the report questions below.

12 Month Progress report: please date and enter in the section below by moving the final report questions down a little UPDATE

FINAL REPORT Summary questions are below--Fill in and UPDATE to save



12-MONTH REPORT--In a brief paragraph explain the project progress at this time.

FINAL REPORT QUESTIONS:

1. Describe the project. What was done, when, and where did the project activities take place?

Financial Report: FINAL REPORT

Financial Report

All sources of income. Add income items as needed.

Date	Description	Funding Source	Amount	%	
Nov 06, 2017	CHECK 1083 SENT TO CLUB	District Grant	-\$2,000.00	47.53 %	<input type="button" value="v"/>
Aug 11, 2017	Coquitlam Sunrise	Club/Other	-\$2,208.04	52.47 %	<input type="button" value="v"/>
Total:			\$4,208.04	100.00 %	

All expense items. Please be specific and add lines as needed.

Description	Supplier	Local Amount	Currency	Tax	Total	Amount
Gazebo structure Exchange Rate 1.23 (.81300813)	Costco	\$1,287.99	CAD	\$0.00	\$1,287.99	\$1,047.15
Flowers, plants & landscape fabric Exchange Rate 1.23 (.81300813)	Amsterdam Greenhouses, Rona	\$918.05	CAD	\$0.00	\$918.05	\$746.38
Patio Furniture, ground compactor, supplies Exchange rate 1.23 (.81300813)	Home Depot	\$849.81	CAD	\$0.00	\$849.81	\$690.90
Rocks, sand, gravel, bark mulch, bricks Exchange rate 1.23 (.81300813)	Meadows Garden Supply	\$685.52	CAD	\$0.00	\$685.52	\$557.33
Landscape desgin, truck and tool usage, on site assistance,fuel Exchange Rate 1.23 (.81300813)	Green Designs Landscaping	\$595.99	CAD	\$0.00	\$595.99	\$484.54
Bronze Project Plaque	National Awards	\$354.65	USD	\$0.00	\$354.65	\$354.65
Garden Decorations Exchange rate 1.23 (.81300813)	Pier 1, Walmart, triple Tree, Art Knapp	\$402.32	CAD	\$0.00	\$402.32	\$327.09
Total:						\$4,208.04

Document Tab: FINAL REPORT

Expense receipts must be uploaded to Documents for the Final Report to be complete.

Project Total Budget: \$4,000.00
Project Total Financing: \$4,000.00
Requested Grant Amount: \$2,000.00

[Cancel Grant](#)

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived

Click on any of the tabs below to access and update the various sections of this Grant application. [Edit Help Text](#)

[Details](#) [Application](#) [Budget](#) **[Documents](#)** [Project Overview](#) [Individual Project Report](#) [Activity Log](#)

Project Documents

Attach all related documents and files. [Edit Help Text](#)

Search: [Go](#) [Add Folder](#) [Add](#) [Add Multiple](#) [Download All](#)

Documents and folders are sequenced alphabetically. Drag and drop to change the document and folder structures.

[Collapse All](#) [Expand All](#)

Name	Uploaded On	Uploaded By	Actions
Collapse All Expand All			

District Grants Final Report

Final Report due by **May 1, 2024** or within 60 days of project completion

NOTE: If the project is not completed by the 1 May deadline then a Progress Report must be submitted including all information as of that date and the anticipated project completion date.

Activity Log Tab

Name and Date is recorded for all activity on the District Grant

Project Total Budget: \$4,000.00
Project Total Financing: \$4,000.00
Requested Grant Amount: \$2,000.00

[Cancel Grant](#)

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[Collapse All](#) [Expand All](#)

Name	Uploaded On	Uploaded By	Actions
Collapse All Expand All			

Applications - How are they Approved?

- First, each Grant Request is reviewed to ensure it meets District Policy;
- District Grant Subcommittee will evaluate each Application;
- If District Grants funds are sufficient, then all applications will be approved.
- If funds are insufficient, projects will be fully or partially funded depending on:
 - contributions the 2 prior years to the Annual Fund
 - compliance of District Grant policies in prior years
- Spending Plan is approved and submitted to RI by August 15.
- District Grant checks should be sent out to clubs before September 1st.

Global Grants

Barbara Kiernan

2023-24 Grants Subcommittee Chair

Eugene Medina

2023-24 Global Grant Chair

Pat Patton

2023-24 District International Service Chair

Global Grants

L d g f d l w s y x x z u u t w y f w l j a s y j w s f y t s f d
f h y n n j x % n m x z x y f r s f g g j l a j f x z w f g g j %
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Types of Global Grants

- Humanitarian projects
 - may include micro-finance
- Vocational Training Teams
 - which are groups of professionals who travel abroad either to teach local professionals about their field or to learn more about it themselves.

NEW IN DISTRICT 5500:

GRANT DEVELOPMENT TEAM

Global Grant Process

You and Your **Club** Must:

- Qualify every year
 - Sign the MOU & attend Grant Management Seminar
- Actively engage with the benefiting community
 - Zoom, messaging, visits
- Partner with a club in another country
- Develop a project plan that includes timelines, identifies participant responsibilities, has measurable outcomes, and includes a detailed budget

Global Grant Process

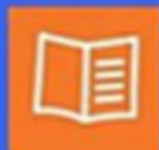
- Conduct a Community Assessment BEFORE applying and include the results in your application
 - A District Grant can be used to do a Community Needs Assessment
- Apply on-line using Rotary's GG template

**YOU ARE NOT ALONE!
THE GRANT DEVELOPMENT TEAM IS
AVAILABLE TO HELP YOU.**

All Global Grant Must:

- The Effort must be Sustainable:
 - Either a new funder or the effort to take it to the next level, or both.
- Originate from an assessment of community needs
- Fall within one of the seven Areas of Focus
- Cost between \$30,000 and \$400,000
- Have measurable outcomes
- Have records retained for five years
- Have a separate, properly identified bank account
 - In the USA or in the Global Grant host country

Basic Education
& Literacy



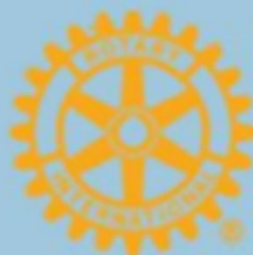
Maternal &
Child Health



Peace & Conflict
Prevention / Resolution



The
Rotary
Foundation



Water &
Sanitation



Support the
Environment



Community & Economic
Development



Disease Prevention
& Treatment

**Areas
of Focus**

Vocational Training Teams

Must have a mission, often skill or knowledge transfer

- Can give training OR can receive training

Can include more than one Rotarian

More than one trip per project is allowed

Logistics up to the Club

No restrictions on age of participants

Must align with one or more areas of focus and have a measurable, long-lasting impact

Teams must have ≥ 2 members with ≥ 2 years of professional experience in area of focus and Rotarian leader with expertise in area of focus.

Lifecycle of a Global Grant

1. DRAFT

- Community Assessment
- Contact Grants Subcommittee Chair (Barbara Kiernan to reserve DDF
- Contact your RI liaison - extremely helpful throughout grant and reporting cycles
- Get to know your primary contact in the Host Club

2. AUTHORIZATION

- This takes time to get all the authorizations
- Avoid submitting in June or July

Lifecycle of a Global Grant

3. SUBMITTAL

- Online in the Grant Center at rotary.org

4. APPROVALS

- Will probably involve repeated questions from experts at RI
- Will make changes, not etched in stone

Grant Development Team can help:

Brainstorm ideas

Think of measures to document progress

Solve problems

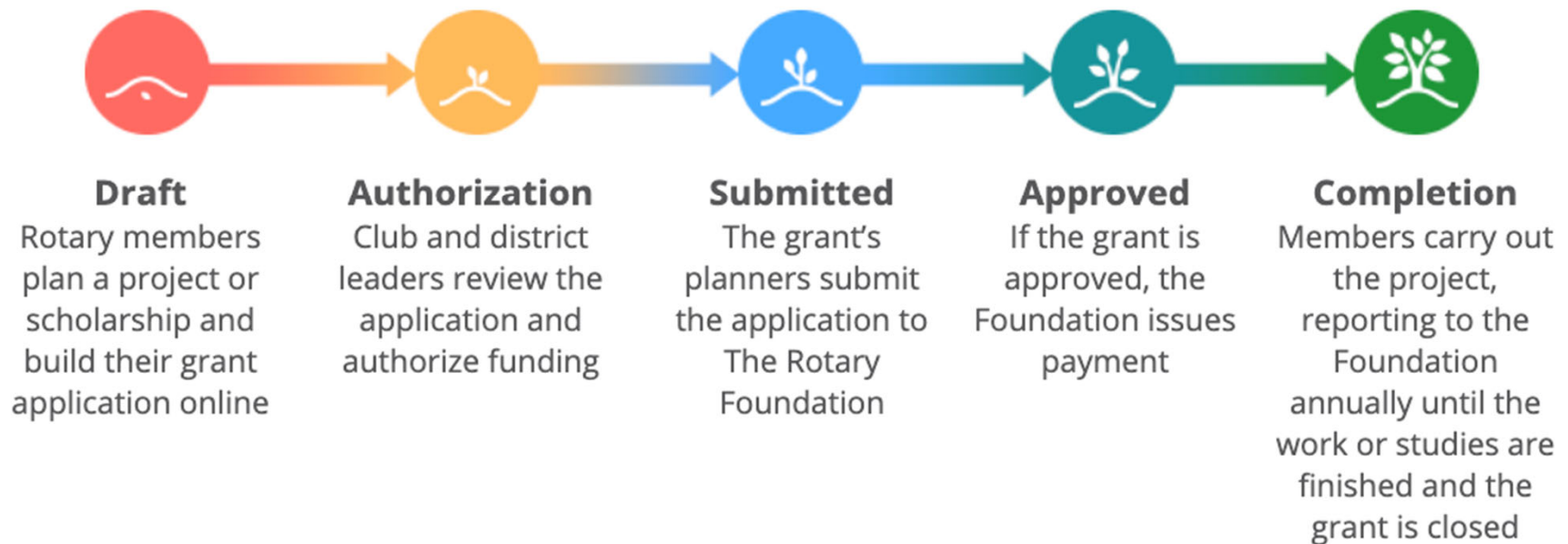
Consider options

It's a pool of Rotarians who have been there before!



Lifecycle of a Global Grant

The lifecycle of a Rotary grant



D5500 Goal with DDF

Fund all grants with DDF (District Designated Funds)

1. How to do this:
 - a. Clubs give funds raised for grant to D5500 for RI Annual Fund
 - b. D5500 gets 50% of this donation back from RI to use as DDF
 - c. D5500 then replaces your donated funds with DDF.
 - d. RI (World Fund) then matches your DDF at 80%:

So every DDF dollar = \$1.80 for project

2. Why avoid cash donations?
 - a. RI will not match cash
 - b. RI charges 5% to administer them

Not a good deal!

Global grants have a minimum budget of \$30,000 and a maximum World Fund award of \$400,000. There is no minimum World Fund match.

Review of Global Grant Submission & Funding

- Global Grant applications can be submitted throughout the Rotary year (July 1 through June 30 – best to avoid change of Rotary year in July).
- Global Grants applications will be approved on a rolling basis throughout the Rotary year.
- Global Grant applicants must submit a Global Grant DDF Request Form to the Grants Subcommittee Chair (Barbara Kiernan – barbarakiernan@cox.net).

Timeline for Reporting

- Progress reports due within 12 months of first payment – and every 12 months thereafter throughout terms of grant
- Grant recipients need to keep daily logs, progress notes on Standard Measures, justification for changes from the original proposal.
- Final report due within two months of completion

Remember:

YOU ARE NOT ALONE!

THE GRANT DEVELOPMENT TEAM IS
AVAILABLE TO HELP YOU.

What does it Take?

Time

- Planning and Fund Raising – 12-18 months
- Grant writing – 2-3 months
- Foundation Review and Approval – 1-2 months
- Project execution – to be determined

Commitment

- Primary Contacts from Host & International Clubs
- Committee of three in each club
- Anticipation of a fun and meaningful international effort!

Resources Available to You

D5500 Global Grant Webpage will have all the resources and links.

Google: D5500 global grants

- Rotary's *A Guide to Global Grants*
- Rotary's *Terms and Conditions for DGs and GGs*
- Rotary's *Area of Focus Policy Statements*

