GRANT MANAGEMENT TRAINING

DISTRICT 5150

JANUARY 11 AND FEBRUARY 22, 2020
TOGETHER WE ARE ROTARY

Rotary International

Established 1905
501c-4 – Board of Directors

Support Clubs and Charter Clubs
Promote Membership
Collect Dues
Set Policies, Admin

The Rotary Foundation

Established 1917
501c-3 – Board of Trustees

Raise Funds for Programs and Projects
Manage Funds
Collect Donations
Set Terms /Conditions for Grants
OUR MISSION – OUR FOUNDATION

To enable Rotarians to advance world understanding, goodwill and peace through ... the improvement of health, the support of education, and the alleviation of poverty
PURPOSE OF OUR SESSION TODAY

To show YOU how to access Our Rotary Foundation funds to benefit your communities at home and around the world
GRANT MANAGEMENT TRAINING GOALS

- Understand how to manage a Rotary Foundation funded grant
- Learn stewardship expectations
- Prepare Clubs to implement the MOU
- Qualify Clubs to receive grant funds 2020-21
DOING GOOD IN THE WORLD
Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves.
GIVING – GRANTS – VIBRANT CLUBS

We Are People of Action
GUIDING DOCUMENTS

TRF Grant Terms and Conditions

Memorandum of Understanding

District 5150 Grant Policies

Guide to Global Grants

Where can you find these?
GUIDING PRINCIPLES

- Projects relate to TRF mission
- Active participation of Rotarians
- No spending prior to approval
- Implement the plan just as approved
- Adhere to US and host area Laws
- Proper Stewardship
GUIDING PRINCIPLES

- Sensitivity to host area
- Proper use of Rotary Marks
- Include proper signage
- Follow Privacy Requirements
WHAT GRANTS CANNOT FUND

- Continuous or excessive support of any one beneficiary
- Purchase of land or buildings
- Project signage >$1000
- Public Relations initiatives
- Contribution to another TRF grant
WHAT GRANTS CANNOT FUND

- Unrestricted cash donations to a beneficiary or cooperating organization
- Activities for which the expense has already been incurred
- Fundraising Activities
- Operating expenses of another organization
Ensures that projects
- Have proper financial controls
- Adhere to technical standards
- Meet the needs of participants
- Fulfill objectives
- Safeguard funds
STEWARDSHIP

- Rotarian supervision
- Responsible management and oversight
- Proper use of funds
- Financial records review
- Reporting any irregularities
- Timely submission of reports
Which are characteristics of ALL Foundation-Funded Grants? Select all that are true.

A. Includes Active Rotarian participation  
B. Aligns with The Rotary Foundation mission  
C. Allows unrestricted cash donations to a beneficiary organization  
D. No spending prior to approval  
E. Rotarians must manage project and project funds
FUNDING BASICS
FUNDING BASICS

- PolioPlus
- Annual Fund
- Endowment Fund

3-Year SHARE

Year 1 Gifts → Income helps pay Operating costs
Year 2 Gifts → Year 3 Gifts
Year 4 Gifts

Projects

Earnings
50% of Donations to Annual Fund come back to District Each Year

3 Year Cycle

50% District Designated Funds (DDF)

District Grants

Global Grants
Donations to Polio, Peace Centers

50% World Fund

Global Grants
Peace Centers
Polio+
Fair Share DDF Allocation Calculation

prior 3 years
Club’s AF Donations ÷ Total D5150 AF Donations = %

X Available District DDF for year

= Club Fair Share DDF
Fair Share DDF Allocation

**Hypothetical**

- **2017-2020 Club’s AF Donations**: $30,775
- **2017-2020 D5150 AF Donations**: $1,384,871

\[ \text{Fair Share DDF} = 2.22\% \]

\[ \times \ \$256,605 \text{ Available DDF 2020-21} \]

\[ = \$5702.35 \text{ Club Fair Share DDF} \]
QUALIFICATION
DISTRICT QUALIFICATION

- The Governor, Governor Elect, and District Foundation Chair must complete an online process to review, answer questions and agree to the District MOU
- The District must ensure that Grant Management Training is available to all clubs
- Clubs must be Qualified to receive grant funds*
THE CLUB MEMORANDUM OF UNDERSTANDING
Agreement between the club and district and acknowledges that the club will undertake the proper implementation of grant activities and proper management of Foundation grant funds.

An Important Legal Document
MEMORANDUM OF UNDERSTANDING

- **Club Officer Responsibilities**
  - Implement, manage, and maintain club qualification
  - Ensure proper stewardship
  - Ensure no actual or perceived conflict of interest
MEMORANDUM OF UNDERSTANDING

- Financial Management
  - Standard set of accounts with detailed ledger
  - Disburse grant funds as appropriate
  - Use checks or credit cards
  - Maintain segregation of duties
  - Establish an inventory system
MEMORANDUM OF UNDERSTANDING

- **Bank Account Requirements**
  - Separate account*
  - Account name should identify grant
  - Have 2 Rotarians signatories
  - Be low- or non-interest bearing
  - Plan for transfer of custody if signatories change
MEMORANDUM OF UNDERSTANDING

- **Report on Use of Grant Funds**
  - Complete
  - Accurate
  - On Time
MEMORANDUM OF UNDERSTANDING

• **Document Retention**
  - Provide access to documents for transparency
  - Retain for a minimum of five years or longer if local law requires
  - Make copies
  - What to keep?
MEMORANDUM OF UNDERSTANDING

• Reporting Misuse of Grant Funds
The club must report any potential and real misuse or mismanagement of grant funds to the District’s Stewardship Chair:
William Gilmore  wg-arch@outlook.com
This is the Club’s responsibility.

For Global Grants, both Sponsor Clubs are responsible regardless of which Club has received the funds.
Authorization and Agreement

- Clubs must be qualified for both District and Global Grant participation
- 2020-21 Club President and President Elect sign*
- 2020-21 Club President and one other have attended GMT
2020-21 Club President and President Elect (or alternate) and Club TRF Chair must take and pass Rotary Foundation Basics by 3/21/20
Annual Fund goal in RCC by 4/1/20
Club must be in “Good Standing”
  - Financial
  - Reporting
  - Tax Returns
Clubs must be qualified by April 1, 2020 in order to receive DDF for either a District or Global Grant in 2020-21
TERMS OF QUALIFICATION

- Valid for one year
- Qualification must be maintained for life of GG
- Club responsible for grant funds
- Disclose conflicts of interest
- Cooperate with all audits
- Use grant funds properly
- Implement the Club MOU, including D5150 Addendum
MEMORANDUM OF UNDERSTANDING

- Read the MOU carefully
- Share with your Board
- Sign it with a clear mind and heart
- Apply for and implement district and global grants
- Make the world a better place
RECAP T or F

- The MOU is a serious document with specific club and officer responsibilities.  T
- The MOU holds Rotarians to the highest ethical standards.  T
- The MOU requires organization and transparency.  T
- The best way to get your PE to sign is to cover up the writing and tell him/her you just want an autograph.  F
TYPES OF GRANTS
ROTDARY FOUNDATION GRANTS

- District grants
- Global grants
ROTARY FOUNDATION GRANTS

District Disaster Relief Grants

Programs of Scale Grants
ROTARY FOUNDATION GRANTS

- District Grants
  - Humanitarian Projects
  - District Scholars
  - Vocational Training Teams

- Global Grants
  - Humanitarian Projects
  - Global Scholars
  - Vocational Training Teams
DISTRICT GRANTS – WHAT ARE THEY?

- Managed by District
- Local or International projects
- Shorter term, smaller-scale projects
- Humanitarian Service*, Vocational Training Teams (VTTs), Scholarships
- Aligned with TRF mission
DISTRICT GRANTS – OTHER POSSIBILITIES

- Community Needs Assessment
- Project Fairs

https://my.rotary.org/en/exchange-ideas/project-fairs
DISTRICT SCHOLARSHIPS

- Any level, length of time, location or area of study
- May be used for vocational training
- No Rotarians or lineal descendants of Rotarians; No employees of Rotary Clubs, Districts, RI or organizations that partner with TRF
DISTRICT VOCATIONAL TRAINING TEAMS

- Activities support mission of TRF
- May be Rotarians or non-Rotarians
- No age restrictions
GLOBAL GRANTS – WHAT ARE THEY?

- International – partners in 2 countries
- Larger, long-term projects
- Minimum budget $30,000
- Support specified Area of Focus Goals
- Responsive to real needs
- Sustainable
- Measurable Outcomes
- Humanitarian- VTTs- Scholars
GLOBAL SCHOLARSHIPS

- Graduate Level Studies
- Area of Focus
- Must study abroad
- International and Host Sponsors
- May be 1-4 years
- No Rotarians or lineal descendants etc.

GLOBAL GRANT SCHOLARSHIP SUPPLEMENT

The Rotary Foundation funds scholarships with global grants and district grants. This supplement focuses on global grant scholarships. For information about district grant scholarships, clubs should contact their district Rotary Foundation committee, and districts should refer to Lead Your District: Rotary Foundation Committee and District Grants Scholarship Best Practices.

OVERVIEW

Through global grants, Rotarians can support future leaders in fields related to the areas of focus:
- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

Global grant scholarships fund graduate-level coursework or research for one to four academic years. A key feature of global grants is the partnership between the district or club in the study location (host sponsor) and the district or club in the scholar’s home country (international sponsor). Both sponsors must be qualified before they can submit an application.

FINDING AND INTERVIEWING ELIGIBLE CANDIDATES

Global grant scholars plan to pursue a career in an area of focus, and their graduate-level educational goals should support this career interest. Pursuing a career in an area of focus means the scholar has a long-term commitment to measurable, sustainable change. Be sure that a candidate’s previous work or volunteer experience, academic program, and career plans are strongly aligned with one of the areas of focus.
GLOBAL VOCATIONAL TRAINING TEAMS

- Must align with one of more Areas of Focus
- Rotarian leader with expertise, knowledge of Rotary
- At least two members with at least two years professional experience within Area of Focus
- Length of visit determined by sponsors
DISTRICT OR GLOBAL GRANT?
<table>
<thead>
<tr>
<th>PARAMETERS</th>
<th>DISTRICT GRANT</th>
<th>GLOBAL GRANT</th>
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<tbody>
<tr>
<td>DURATION</td>
<td>1 Year (approx.)</td>
<td>1/ 2+ Years</td>
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<td>PURPOSE</td>
<td>HUMANITARIAN PROJECTS SCHOLARSHIPS VOCATIONAL TRAINING TEAMS</td>
<td>HUMANITARIAN PROJECTS SCHOLARSHIPS VOCATIONAL TRAINING TEAMS</td>
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<tr>
<td>AREA OF FOCUS</td>
<td>Not Required by TRF</td>
<td>YES and Within Specific TRF Policy Guidelines</td>
</tr>
<tr>
<td>HOST PARTNER</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>LOCATION</td>
<td>LOCAL OR INTERNATIONAL</td>
<td>INTERNATIONAL</td>
</tr>
<tr>
<td>ACTIVE ROTARIAN INVOLVEMENT</td>
<td>YES</td>
<td>YES</td>
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</table>
MAKING A SUSTAINABLE IMPACT
Giving a community the skills and knowledge to maintain project outcomes for the long term, after grant funds have been expended.
INVEST IN PEOPLE

MAKE A SUSTAINABLE IMPACT

- Start with the community
- Encourage local ownership
- Provide training
- Buy local
- Find local funding
- Measure your success
COMMUNITY NEEDS ASSESSMENT

- Examines strengths, weaknesses, needs, assets
- Helps to identify relevant opportunities for projects
COMMUNITY NEEDS ASSESSMENT

COMMUNITY ASSESSMENT TOOLS
A resource for Rotary projects

- Community meeting
- Focus group
- Survey
- Asset inventory
- Interview
- Community mapping
RECOMMENDED STAKEHOLDERS

**Peace and conflict prevention/ resolution**
- Victims of violence, refugees, or internally displaced people
- Perpetrators of violence
- Factions that are at odds with each other
- Civil society organizations
- Schools and educational institutions
- Local government and law enforcement authorities

When you're assessing sensitive populations such as trauma victims or communities in conflict, it is crucial that you work directly with individuals or organizations that understand the dynamics of the situation. These collaborations will ensure that the assessments are conducted appropriately, with the best possible outcome.

**Water and sanitation**
- Community leaders, particularly women
- Ministries of water, sanitation, or environment
- Ministries of education, along with students, teachers, headmasters, and parent associations (WASH in

**Basic education and literacy**
- Teachers
- Parents
- Students
- Youth who do not attend school
- School administrators
- School management committees
- Ministries of education
- Adult education institutes
- Vocational training institutes
- Community and technical colleges
- Libraries and librarians

**Disease prevention and treatment & maternal and child health**
- Individual health care recipients:
  - Pregnant women
  - At-risk children
  - Adults at risk for noncommunicable and communicable diseases
  - At-risk aging population

**Economic and community development**
- Local government authorities
- Women’s groups
- Government extension services
- Job research centers
- Entrepreneurs
- Ministries of trade, agriculture, social services, women’s empowerment, and vocational services
- Farmers
- Unemployed youth and adults
- Business owners
- Banks
- Cooperatives (agricultural, savings and loan, etc.)

**Access and continuum of care structures:**
- Prevention, primary care, and referral systems
- Transportation providers
- Hospitals
- Follow-up and rehabilitation services
- Chronic care support and palliative/hospice care systems
GLOBAL GRANTS COMMUNITY ASSESSMENT RESULTS

Use this form to report community assessment findings to The Rotary Foundation when you apply for a global grant.

Assessing the strengths, weaknesses, needs, and assets of the community you plan to help is an essential first step in designing an effective and sustainable global grant project. See Community Assessment Tools for full instructions and helpful tips.

This form will help you report the results of your community assessment, and it’s required when you apply for any humanitarian or vocational training team grant. Complete a separate form for each beneficiary community (e.g., school, health care system, or village), using information that is both current and specific to each community. Remember, you can’t use global grant funds to cover the cost of doing an assessment, but you can use district grant funds.

Beneficiary community or institution

Click or tap here to enter text.

Groups in the community that would receive a clear, direct, and immediate benefit from the project

Click or tap here to enter text.

Beneficiaries’ demographic information, if relevant to the project

Click or tap here to enter text.

Who conducted the assessment? (check all that apply)

- Host sponsor members
- International sponsor members
- A cooperating organization
SELECT PROJECT

- Base project on community’s needs
- Assess resources of your Club and potential partners
- Talk to the community
- Maximize Public Image opportunities

Community meeting  Focus group  Asset inventory  Community mapping
AREAS OF FOCUS

- Promoting Peace
- Fighting Disease
- Providing Clean Water
- Saving Mothers and Children
- Supporting Education
- Growing Local Economies
Review Areas of Focus Policy

Design project based on Area of Focus

Ensure project relates to goals of chosen Area(s) of Focus
GUIDELINES FOR FUNDING AND IDEAS!

PEACE AND CONFLICT PREVENTION/RESOLUTION GUIDELINES FOR GLOBAL GRANT FUNDING

Rotary is dedicated to six areas of focus to build international relationships, improve lives, and create a better world. Through global grants, awarded by The Rotary Foundation, clubs and districts participate in strategy-focused, high-impact activities in these areas.

All global grant activities are required to align with the goals of an area of focus. For peace and conflict prevention/resolution, the goals are:

1. Train leaders, including potential youth leaders, to prevent and mediate conflict
2. Support peacebuilding in communities and regions affected by conflict
3. Support studies related to peace and conflict prevention/resolution for career-minded professionals

Use this document as a guide when applying for a global grant. You’ll learn how to make your proposal as sustainable, what information is required for specific project types, and where to find additional support.

When considering projects in peace and conflict prevention/resolution, pay special attention to populations at risk of, or recovering from, violent conflict. This approach, called conflict sensitivity, requires you to look at specific dynamics within a community that can help heal it or risk further dividing it.

A. Elements of Sustainability


ENGLISH (EN)

5. DOMESTIC VIOLENCE AND HUMAN TRAFFICKING PROGRAMS

In recent years, Rotary has seen a growing interest in global grant projects that address domestic violence and human trafficking. Both areas have the potential to be strong conflict prevention/resolution. Some examples of how Rotarians might work in these areas include:

- Providing psychosocial support for victims of domestic violence or trafficked individuals
- Working with existing programs to expand their ability to assist these populations
- Skills training for domestic violence victims or trafficked persons to reintegrate into home communities or communities where they now reside
- Prevention and advocacy campaigns related to both domestic violence and human trafficking

Ensure these advocacy campaigns are well coordinated with existing organizations and municipal governments.

6. ADDITIONAL IDEAS FOR PEACEBUILDING PROJECTS

Some examples of less common but acceptable projects in the peacebuilding and conflict resolution fields include:

- Security-based projects. Community-based policing is an approach that brings together the police, civil society, and local communities to work together to develop solutions to local security issues.
- Socioeconomic initiatives. Community-based approaches to economic development have been adopted for conflict-prone regions. By forming cooperatives that bring together groups from different areas that may have previously been in conflict, these projects can foster social capital and cooperation across divides and build the foundation for reintegration and reconciliation.
RECAP: What Makes A Project Sustainable?

A. Includes Training  
B. Begins with a Community Needs Assessment  
C. Is designed by the international sponsor club  
D. Uses technology and materials appropriate/available in the local community  
E. Includes ongoing monitoring and evaluation  
F. Is supported by beneficiary contributions  

T: True  
F: False
PARTNER TO MAXIMIZE IMPACT
PROJECTS AND PARTNERS

- RI Convention
- Project fairs
- Other Clubs / Districts
- Rotary Showcase
- Rotary Ideas
- Facebook
- International travel
- Rotary events – VTTs – Scholars - RYE
- www.matchinggrants.org
Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves. Read more on our strategic plan >
ROTARY IDEAS – ROTARY SHOWCASE

Exchange Ideas  Take Action  Learning & Reference  Manage  The Rotary Foundation  News & Media  Member Center

Give
Ways to Give
Planned Giving
Donor Recognition

End Polio

Develop Projects
Lifecycle of a Project
Rotary Club Central
Rotary Ideas
Rotary Showcase

Apply for Grants
Grant Center
District Grants
Global Grants
Qualification
Grant Travel

Empower Leaders
Sponsor a Rotaract club
Sponsor an Interact club
Organize a RYLA Event
Create a Scholarship
Start an Exchange
Support Peace Centers
Join a Rotarian Action Group
Form a Rotary Fellowship
Organize a Rotary Community Corps
Motorcycle library for underdeveloped village
Mandalamekar, one of underdeveloped village in Tasikmalaya, West Java Indonesia, has four elementary schools and all of them didn't have a school library or public library. To serve the community needs, providing mobile library such as motorcycle library is the best solution.

MAMMOGRAPHY SYSTEM FOR ABA AND ENVIRONS BY R.C. EZIUKWU ABA
Cancer is one of the world's deadliest diseases today. A good number of Aba residents die annually from the scourge, specifically, breast cancer. Most of the deaths recorded are due to late detection of the disease. This project will

Mount Holly Community Garden Center
The Mount Holly Rotary Club is partnering with the Mount Holly Community Garden to build a butterfly garden, educational workshop area, and pergola.
# ROLE OF PARTNERS – Global Grant

## Host sponsor
- Initiates the project
- Conducts a community assessment
- Manages project implementation and budget
- Provides local assistance and support to vocational training teams and scholars during their time abroad
- Receives project funds

## International sponsor
- Provides financial assistance, technical support, and other guidance
- Performs project tasks that can be done remotely, as well as participating in service during site visits
- Prepares any vocational training teams or scholars for travel and study abroad

## Both sponsors
- Must be qualified to participate in a global grant
- Develop a project plan
- Have project committees that collaborate with each other
- Partner with a cooperating organization (a nongovernmental organization, community group, or government entity) if needed
- Submit project reports in the Grant Center
Cooperating Organization MOU

- Parties to Agreement
- Purpose
- Understandings
- Responsibilities
- Conflict of Interest
- Signatures
MATCH THE PHRASE AND DESCRIPTION

- **COOP ORG**
  - Located outside the project country

- **INTL SPONSOR**
  - Located in/near community where project takes place

- **HOST SPONSOR**
  - Provides technical expertise, training, advocacy
PLAN YOUR PROJECT
PLAN YOUR PROJECT

- Address real community needs
- Have measurable goals and outcomes
- Ensure sustainability
- Use expert advice
- Involve participants and partners
- Have ongoing monitoring and evaluation
- Maintain proper stewardship of funds
Form a 3-person grant committee; 2-person for District grant
Assign roles
Make a detailed implementation plan
Incorporate a Public Image plan
Create a financial plan
Secure funding
Establish a document retention plan
Have a contingency plan
SET GOALS / MEASURABLE OUTCOMES

- Use your Community Assessment
- Gather baseline data
- Determine method of measurement
- Create Timeline
BEGIN WITH THE END IN MIND

GLOBAL GRANT MONITORING AND EVALUATION PLAN SUPPLEMENT

Global grant sponsors for humanitarian projects and vocational training teams must incorporate monitoring and evaluation measures within the area of focus section of the online grant application. This supplement contains The Rotary Foundation (TRF) standard measures for each area of focus as well as the standard terminology, definitions, and measurement methods. Following these standards helps ensure that the Foundation can track worldwide Rotarian efforts and accomplishments, and publish the results using the definitions used by other nonprofit organizations.

STEPS FOR MONITORING AND EVALUATION PLAN

1. Establish clear project goals.
2. Identify applicable Rotary Foundation standard measures.
3. Identify additional project-specific measures.*
4. Establish baseline data and the methods you’ll use to collect data.
5. Submit the plan as part of the online application.
6. Collect data during the project, and monitor progress.**
7. Evaluate data and submit results to the online project. Modify the documentation to include actual
CREATE A BUDGET

- Realistic
- Competitive bidding – required for significant expenses
- Reasonable prices/ Good quality
- Disclose conflicts of interest
CONFLICT OF INTEREST

- Exists when a Rotarian benefits financially or personally from a grant
- Benefit can be direct to a Rotarian or indirect to an associate of the Rotarian
CONFLICT OF INTEREST

Your Club is planning to renovate a community park. You conducted a competitive bidding process to select a landscaping contractor. The best bid was submitted by a company owned by one of your Club members.

Can this grant be funded? How to proceed?
GLOBAL GRANT FINANCING

- Minimum $30,000
- International sponsor provides 30% of funding
- Qualified Clubs allocate their Fair Share DDF
- DDF matched 100% by World Fund
- Rotarian and non-Rotarian cash contributions matched 50% by World Fund
SAMPLE BUDGET GLOBAL GRANT

- Clubs’ contribution = $10K
- 5% Club Cash ‘admin fee’ = $500
- Clubs’ Fair Share DDF = $10K
- TRF matches DDF 1/1 = $10K
- TRF matches Clubs .5/1 = $5K
- TOTAL PROJECT = $35.5K

(TRF minimum funding = $15K)

Note: Grant financing cannot be changed once approved
GLOBAL GRANT BUDGET NOTES

- May include up to 10% contingency
- May include up to 10% for project management
- May include up to 10% for measuring project outcomes
10 TIPS

10 WAYS TO IMPROVE YOUR GLOBAL GRANT APPLICATION

1. Conduct a thorough assessment of community needs and strengths

2. Based on needs assessment, identify the most appropriate area of focus

3. Provide a detailed project implementation plan that encompasses all aspects of the proposed project activity

4. Provide a detailed listing of the specific tasks that both the host and international Rotarians will carry out in conjunction with the project

5. Provide a detailed budget with vendor information and information about how these vendors were selected

6. Clearly explain specific sustainability components

7. Include DETAILED information for each training opportunity presented in application

8. Include MOUs for each cooperating organization

9. Include specific information related to measurement and evaluation

10. Complete the entire application
Qualified Clubs may **use their Fair Share Funding to support District Grant projects**

- If total requests exceed the District’s Block Grant Funds, Grant Allocation Group will allocate available DDF
- Clubs are guaranteed 50% of requested DDF allocation if project meets guidelines
A GOOD DISTRICT GRANT?

A. Purchasing the decorations and supplies for a fundraiser to support two students to RYLA
B. Working with the Senior Center to identify homes that need retrofitting for disabled access and then completing the work with Club members and other professionals
C. Donating $8,000 to the local homeless shelter to help outfit a new kitchen
Would this project be approved for a Global Grant?

Would this project be approved for a District Grant?
GLOBAL GRANTS – HOW TO APPLY?

- Online only
  www.rotary.org/myrotary
- Can be submitted at any time
- Consult with District re DDF
- District confirms Club is Qualified
- Allow at least 90 days prior to travel
GLOBAL GRANT FIRST STEPS

- Sign in to My Rotary
- Select Grant Center from TRF Tab Menu
Welcome to Rotary grants! As Rotary members, we contribute our skills, expertise, and resources to solve some of the world’s most serious problems. From providing clean water in local communities to promoting peace worldwide, Rotary grants can bring your project ideas to life.

Use the Rotary grants tool to apply for a grant, track its progress, report on it, and search for other grants in your district.

**Types of grants**
The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training teams. Here’s an overview:

- **Global grants** support large international projects with long-term, sustainable outcomes in one or more of Rotary’s areas of focus. They range from $15,000 to $200,000.
- **District grants** fund smaller-scale, short-term projects that address immediate needs in your community or abroad.

**The lifecycle of a Rotary grant**

1. **Draft**
   Rotary members plan a project or scholarship and build their grant application online.

2. **Authorization**
   Club and district leaders review the application and authorize funding.

3. **Submitted**
   The grant’s planners submit the application to The Rotary Foundation.

4. **Approved**
   If the grant is approved, the Foundation issues payment.

5. **Completion**
   Members carry out the project, reporting to the Foundation annually until the work or studies are finished and the grant is closed.

Grant Resources
- Questions about the grant process?
- We’re here to help, from getting you started to final steps.
- Application Supplement for Microcredit Projects
- Areas of Focus Policy Statements
- Community Assessment Results
- Cooperating Organization Memorandum of Understanding
- Global Grant Application Template
- Global Grant Calculator
- Global Grant Lifecycle
- Global Grant Monitoring and Evaluation Plan Supplement
- Global Grant Report Template
- Global Grant Scholarship Supplement
- Grant Travel
Grant Application
Saving Mothers and Children in Guinea

All fields are required unless noted as “optional”.

Step 1: Basic Information
Step 2: Committee Members

Who will serve on the grant’s Host committee?

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<thead>
<tr>
<th>Name</th>
<th>Club</th>
<th>District</th>
<th>Role</th>
</tr>
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Do any of the committee members have specific expertise or experience in the project area?

Tell us a little about your project. What is the project goal? What is the expected impact? How will the project be implemented?

Step 4: Areas of Focus
Which area of focus will this project support? Select at least one area. Note that we’ll ask you to set goals and answer questions for each area of focus you select.

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development
## GLOBAL GRANT 12 STEPS

All fields are required unless noted as "optional".

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<th>Step 1: Basic Information ✓</th>
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<tr>
<td>Step 2: Committee Members ✓</td>
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<td>Step 3: Project Overview ✓</td>
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<td>Step 4: Areas of Focus ✓</td>
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<td>Step 5: Measuring Success ✓</td>
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<td>Step 6: Location and Dates ✓</td>
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<td>Step 7: Participants ✓</td>
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<td>Step 8: Budget ✓</td>
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<tr>
<td>Step 9: Funding ✓</td>
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<td>Step 10: Sustainability ✓</td>
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Finalize & Submit

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<th>Step 11: Review and Lock</th>
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<td>Step 12: Authorizations</td>
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GLOBAL GRANT FIRST STEPS

Finalize & Submit

Step 11: Review and Lock
Step 12: Authorizations
YOUR AUTHORIZATIONS & LEGAL AGREEMENTS

Authorization

Getting your grant application authorized is the last step before submitting it to The Rotary Foundation. Review the information that has been entered in each step and then give your authorization below. Depending on your role, you may need to authorize the application more than once.

When you locked the application in step 11, an email was sent to club or district leaders who also need to authorize your application. In this step, you can see which of them have done so.

Primary contact authorizations

Application Authorization

By submitting this global grant application, we agree to the following:
1. All information included in this application is, to the best of our knowledge, true and accurate, and we intend to implement the activities as presented in this application.
2. The club/district agrees to undertake these activities as a club/district.
3. We will ensure that cash contributions (as detailed in the grant financing) will be forwarded to The Rotary Foundation (TRF) or sent directly to the global grant bank account after Trustee approval of the grant.
4. Credit is used if TRF grants are made for the specific project under this global grant.

Authorize now
GLOBAL GRANT LIFE CYCLE

**Application Phase**
If application arrives at TRF complete, time from receipt to approval of application is approximately 4 weeks.*

1. Grant application submitted online including legal authorization
   - Grant application submitted online including legal authorization
   - Missing information is supplied to staff

2. Staff reviews application
   - Staff reviews application

3. Applications are forwarded for a secondary review**
   - Applications are forwarded for a secondary review**

4. Sponsors receive notification of approval - announcement letter, and payment instructions
   - Sponsors receive notification of approval - announcement letter, and payment instructions

5. Sponsors provide bank account information and submit contributions
   - Sponsors provide bank account information and submit contributions

6. Grant payment is processed. Larger projects are normally paid in installments based on a spending plan.
   - Grant payment is processed. Larger projects are normally paid in installments based on a spending plan.

**Payment Phase**
From time that TRF receives bank account information and contributions, processing of payment takes approximately 2-4 weeks.*

7. Sponsors submit progress reports online every twelve months for the life of the grant. Final report is due within two months of project’s completion.
   - Sponsors submit progress reports online every twelve months for the life of the grant. Final report is due within two months of project’s completion.

8. Staff reviews report
   - Staff reviews report

9. Projects for which acceptable final reports are received are closed. Closure letter is sent to project partners.
   - Projects for which acceptable final reports are received are closed. Closure letter is sent to project partners.

**Reporting Phase**
Staff review reports in the order in which they are received within 8 weeks of receipt at TRF.*

---

* Timeframe may be longer during peak times.

** Applications requesting a match of more than $50,000 are reviewed by the Cadre. Applications requesting a match of more than $100,000 are reviewed by the Trustees.
# GLOBAL GRANT REVIEW

<table>
<thead>
<tr>
<th>World Fund Request Amount</th>
<th>Technical Review</th>
<th>Interim Site Visit</th>
<th>Advance Site Visit</th>
<th>Approval by Trustees</th>
</tr>
</thead>
<tbody>
<tr>
<td>$15,000-$50,000</td>
<td>(depends on technical complexity)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$50,001-$200,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$200,001-$400,000</td>
<td></td>
<td>Project audit</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*The review process may vary if your project includes directed gifts.*
GRANT CENTER HOW TO GUIDE

HOW TO USE THE GRANT CENTER

The Grant Center is the place to go for everything you need to do online for your Rotary Foundation grants, and it keeps all of Rotary’s grant-related resources handy for you. This guide will show you how to:

- Find the Grant Center
- Navigate the Grant Center
- Apply for a Global Grant
- Authorize a Global Grant Application (Club Presidents and District Leaders)
- Enter Global Grant Bank Account Information
- Report on a Global Grant
- Authorize a Global Grant Report
- Apply for a District Grant (District Leaders Only)
- Report on a District Grant (District Leaders Only)

Webinar:
https://vimeo.com/212329193
RESOURCES

GLOBAL GRANT APPLICATION TEMPLATE

The following pages outline the questions you will be asked on the online global grant application. You can use this document for planning purposes. Find the actual grant application at www.rotary.org/grants.

Step 1: Basic information

What’s the name of your project?

What type of project are you planning? (community project, vocational training, scholarship)

All global grants support projects within Rotary’s areas of focus.

Select the primary host and international contacts for this project.

The primary host contact lives in the country where the project, training, or study will take place. The primary international contact lives in another country. Each contact will be responsible for all grant-related correspondence and reporting to The Rotary Foundation.

Step 2: Committee members

The committee will include at least three members from the host sponsor and three members from the international sponsor.

Who will serve on the grant’s host committee?

Who will serve on the grant’s international committee?

Do any of these committee members have potential conflicts of interest? If so, please briefly explain.

A conflict of interest is a relationship through which an individual involved in a program grant or award causes benefit for such individual or such individual’s family, acquaintances, business interests, or an organization to which such individual is a trustee, director, or officer.

A GUIDE TO GLOBAL GRANTS

 Rotary

The Rotary Foundation
IMPLEMENT, MONITOR, EVALUATE
IMPLEMENT, MONITOR, EVALUATE

- Communicate!
- Follow project plan
- Monitor throughout
- Get pre-approval for changes
- Keep good records
- Evaluate to share and document success, improve future projects, replicate/scale
**KEEP**

- All grant correspondence
- Beneficiary documentation
- Cooperating organization MOUs and memoranda
- Vendor documentation
- Inventory
- Photos of project
REPORT, SHARE, CELEBRATE
GLOBAL GRANT REPORTS: Frequency

Progress reports
- Within 12 months of first payment
- Every 12 months through the life of the grant

Final report within 2 months of completion
GLOBAL GRANT REPORTS Include:

- How partners were involved
- Type of activity
- Evaluation of project goals
- How area of focus goals were met
- How funds were spent
- Number of beneficiaries and how they benefited
Handling of unused funds

- $>500 TRF must approve use for project-related expenses OR return to TRF and credited to World Fund
- $<500 may be used for activities that meet the global grant eligibility requirements and do not require pre-approval from TRF
RESOURCES
GRANTS – ASSISTANCE!

- District Grants Chair, Committee & Technical Resource Cadre
- District Rotary Foundation Chair & Committee
- District International Service Chair
- District website www.district5150.org
GRANTS – ASSISTANCE!

- TRF Technical Resource Cadre
- Assistant RRFC & RRFC
- TRF Grants Officer
- Areas of Focus Managers
- Rotarian Action Group
- www.rotary.org/myrotary
- www.zone2627.org/TRF Resources
- Colleagues
Big West Foundation Coordinators

**WHAT WE DO:** Our team of experienced Rotarians are here to help you reach your fundraising and grants goals. We are able to assist with any challenges you may have with The Rotary Foundation. We can provide you with easy access to useful resources, speakers, *million dollar dinners*, END POLIO NOW celebrations, fund-raisers and endowment and major gift opportunities.

**HOW WE CAN HELP:** We help with District and Global Grant applications and assist with Community Assessment plans. Let us help facilitate your District’s Strategic Plan to work with The Rotary Foundation. We offer help in training DRFC members and club Rotary Foundation Chairs. We can help in sharing best practices with our knowledge of how our Zone’s 30 Districts operate.

**KEY PROGRAMS** planned for 2019-20:

- Regional Annual Zone TRF Workshops
- 3 Webinars during the 2019-20 year

Meet the Big West Foundation Team, including our areas of expertise.

---

**TRF RESOURCES**

- TRF Resource Guide (Zones 26 & 27)
- TRF Centennial
- Annual Giving (Every Rotarian, Every Year)
- Contribution & Recognition
- Endowments, Major Gifts & Planned Giving
- Grants – Global and District Guides, Manuals & Reports
- Paul Harris Society
- PolioPlus (End Polio Now)
- Rotary Peace Centers
GRANTS – ASSISTANCE!

- Grant Management Training Videos
  - Overview and MOU
  - District Grants
  - Global Grants
DISTRICT GRANTS – HOW TO!
WHERE IS THE DISTRICT GRANT APPLICATION ON THE DISTRICT 5150 WEBSITE?
Welcome to The Rotary District 5150 Website

Rotary is a worldwide network of inspired individuals who translate their passions into relevant social causes to change lives in communities.

Made up of over 35,000 Rotary clubs around the world, Rotary International forms a global network of business, professional, and community leaders who volunteer their time and talents to serve communities locally and around the world – and form strong, lasting friendships in the process.
DISTRICT WEBSITE

The Rotary Foundation

- Donate
- The Rotary Foundation
- End Polio Now
- Global Scholars
- Rotary Grants
- Contribute
District/Global Grants

Grant Resources

District Grant Overview – 2019-2020

Rose C Stone Donor Advised Fund (DAF) for Clubs
STEP 1 of the District Grant process: Welcome!

You are now on your way to accessing available funding to do an amazing project or service during the 2020-2021 Rotary year. Carefully read this overview and then you’ll be ready to move to Step 2.

In order for District 5150 to continue qualifying to receive grant funding from The Rotary Foundation (TRF), each Club must understand and comply with TRF’s strict rules regarding the grant process. Those requirements are included in District 5150’s District Grant application. Click here for details about TRF’s rules.

As you read through the District Grant process, if you have questions or need assistance, please contact District Grants Coordinator Cyndy Simms at districtgrants5150@gmail.com or 909-544-9966.

Let’s begin…

Where does District Grant funding come from?

District Designated Funds (DDF) provide funding for District Grants and Global Grants. Each Club is allocated DDF annually by District 5150 based on the Club’s prior 3 years of donations to The Rotary Foundation’s (TRF) Annual Fund. Estimated DDF allocations for the coming Rotary year are sent to Club Presidents and President-Elects by the end of April each year.
STEP 2 of the District Grant process: Get Qualified before April 1


2) One of the following Club leaders must also attend one of the Grants Management and Memorandum of Understanding (MOU) training sessions sponsored by District 5150:
   a. President Nominee (preferable)
   b. International Chair
   c. Community Service Chair
   d. The Rotary Foundation (TRF) Chair

3) The signatures of the President-Elect and President Nominee are required on The Rotary Foundation (TRF) Memorandum of Understanding (MOU) and the District 5150 MOU Addendum. If the Club does not have a President Nominee by April 1, one of the Chairs (2b, 2c, 2d) who attended the Grants Management and MOU training session may sign in lieu of the President Nominee. Click here for copies of the TRF MOU and the District 5150 MOU.
4) The President-Elect, President Nominee (or one of the Chairs (2b, 2c, 2d) and The Rotary Foundation (TRF) Chair must have taken and passed the Rotary Foundation Basics Course in RI’s online Learning Center no later than March 21, 2020.

5) The Club President-Elect must enter goals into Rotary Club Central for The Rotary Foundation’s Annual Fund no later than April 1, 2020.

6) Qualification requirements must be completed by April 1, 2020 for the 2020-2021 Rotary Year and submitted to William Gilmore, District Stewardship Chair, at wg-arch@outlook.com

7) NOTE: You must complete Step 2 before advancing to Step 3.

In addition, the Club must be:
   a. Current on Rotary International and District 5150 dues
   b. In good standing with Rotary International and the District including membership reporting and financial obligations
   c. Compliant with State and Federal Tax reporting requirements
STEP 3 of the District Grant process: Compete the District Grant Application before June 1, 2020

1) Work with your Club or Board of Directors to determine DDF grant projects for your Club in 2020-2021.
2) Click on the District 5150 Grant application and follow the directions to complete the application.
3) Allow enough time to complete the application and secure the signatures of the 2019-2020 President-Elect and 2019-2020 President Nominee before June 1.
4) Completed on-line applications will automatically be emailed to Cyndy Simms, District 5150 Grants Coordinator. Applications must be received by June 1, 2020.
5) Need help? Contact District Grants Coordinator Cyndy Simms at districtgrants5150@gmail.com or 909-544-9966.

Seems obvious, but all information in the District Grant application must be true and accurate.
TIPS BEFORE YOU BEGIN…

• Review the application form
• Be sure you have the information required to complete the application
• If your Club applied for DDF funds last year, use a copy of last year’s application as a guide
• Confirm your 2020-21 Club President’s and President-Elect’s approval
Thank you for the good work your Club is about to do! Applications for DDF (District Designated Funds) are completed on-line and must be received by JUNE 1, 2020. See District Grant Policy 2020-2021 (link) and TRF "Terms and Conditions for Rotary Foundation District Grant Projects" (link) for reference, as needed. If you have questions about this application, please contact District Grants Coordinator Cyndy Simms at districtgrants5150@gmail.com or 909-544-9966. Thank you for applying!

LEAD CLUB NAME *

Foster City

If Multi-Club Project, List Names of Supporting Clubs

PROJECT NAME *

3rd Grade Dictionary Project

Briefly describe the project and what the project will do. *

Distribute dictionaries to 3rd grade students at Audubon, Brewer Island, and Foster City elementary schools

Start Date *

2020-12-01
Estimated Completion Date

- 2021-01-31

District Grants require active involvement of Rotarians to:
- Assess community needs
- Develop a project plan
- Establish a committee of 2+ Rotarians to oversee expenditure of funds and implementation of the project
- Promote the project in local media
- Submit required reports on time

Number of Rotarians that will participate in this project?

- 20

Describe active participation by Rotarians (non-financial). Provide at least two (2) examples of active participation.

- Place Rotary labels in the front of each dictionary and distribute dictionaries to 3rd grade students

Number of non-Rotarians that will benefit from this project?

- 400

Who is the relevant community and how will the project improve their lives?

- 3rd grade students, their parents, and teachers will see students using improved dictionary skills

What are the expected long-term community impacts?

- Students will be better writers, spellers, and readers
Is this a Dictionary Project? *

- Yes
- No

If yes, how many dictionaries will be distributed?

400

Is this a RYLA Project? *

- Yes
- No

If yes, how many students will be sponsored?

Will the project address any of the 6 Areas of Focus? If YES, which Area(s)? *

- No
- Peace and Conflict Prevention/Resolution
- Disease Prevention and Treatment
- Water and Sanitation
- Maternal and Child Health
- Basic Education and Literacy
- Economic and Community Development
How will the project meet the goals of that Area of Focus? *

Students will become better writers, spellers, and readers

Describe how the general public will know that this is a Rotary-sponsored project? Provide examples. *

Articles in the Islander newspaper and school district newsletters

Is a cooperating organization involved in the project? *

☑ Yes

☐ No

If YES, what is the name of the organization(s) and what role does it play in the project?

San Mateo-Foster City School District gives approval for the dictionary project

CLUB PRIMARY CONTACT NAME *

Rich Mozzini

Club Primary Contact Rotary Position *

Dictionary Project chairperson

Club Primary Contact Email Address *

rmozzini@sanbrunocable.com

Club Primary Contact Phone Number *

650-555-5555
CLUB SECONDARY CONTACT NAME *

Mary Lou Griffin

Club Secondary Contact Rotary Position *

Club President 2020-2021

Club Secondary Contact Email Address *

marylougriffin1@yahoo.com

Club Secondary Contact Phone Number *

650-555-5555
ITEMIZED BUDGET

The ITEMIZED BUDGET must specify INCOME (District Grant funds - DDF, Club funds, other funds) and EXPENDITURES (costs of equipment, furniture items, gasoline, meals, lodging, training, number of dictionaries, etc.). Supporting documentation may be requested. Receipts are required for the Final Report.

INCOME

DISTRICT GRANT FUNDS (DDF) REQUESTED UP TO $_______OF DDF AVAILABLE *

4300

Club Funds

0

Other Funds - please specify source

0

TOTAL PROJECT INCOME *

4300
EXPECTED EXPENDITURES - provide specific costs *

400 dictionaries x $10.75 each

TOTAL PROJECT EXPENDITURES *

4300

If your Club does not receive the entire amount of DDF requested, can your Club fund the shortfall from its own funds? *

☑ Yes

☐ No

If NO, can the project be downsized to meet the amount of the District Grant and Club contribution to the project?

☐ Yes

☐ No
REQUIRED AUTHORIZATION
As President of this Rotary Club for 2020-2021, I affirm that the Club has voted to undertake this project as an activity of the Club.

2020-2021 PRESIDENT NAME *

Mary Lou Griffin

Signature *

Date: Monday, 6 January 2020 (EST)
Name:

[Signature]

Date *

2020-03-15

2021-2022 PRESIDENT NAME (2020-2021 PRESIDENT-ELECT) *

Curtis Chen

Signature *

Date: Monday, 6 January 2020 (EST)
Name:

[Signature]
Date *

2020-03-16

ALTERNATE NAME (if 2020-2021 President-Elect is unknown)

ALTERNATE ROTARY POSITION

☐ Club Rotary Foundation (TRF) Chair

☐ Community Service Chair

☐ International Service Chair

Signature

Date: Monday, 6 January 2020 (EST)
Name:

CONTINUE →

* indicates required fields
## Rotary District 5150 District Grant Application 2020-2021

**Step 2 of 2: Confirm**

If the information below is correct, press Confirm to complete your form submission. Otherwise, press Modify.

<table>
<thead>
<tr>
<th>LEAD CLUB NAME</th>
<th>Foster City</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>If Multi-Club Project, List Names of Supporting Clubs</strong></td>
<td></td>
</tr>
<tr>
<td><strong>PROJECT NAME</strong></td>
<td>3rd Grade Dictionary Project</td>
</tr>
<tr>
<td><strong>Briefly describe the project and what the project will do.</strong></td>
<td>Distribute dictionaries to 3rd grade students at Audubon, Brewer Island, and Foster City elementary schools</td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
<td>Tuesday December 01, 2020</td>
</tr>
<tr>
<td><strong>Estimated Completion Date</strong></td>
<td>Sunday January 31, 2021</td>
</tr>
<tr>
<td><strong>Number of Rotarians that will participate in this project?</strong></td>
<td>20</td>
</tr>
<tr>
<td><strong>Describe active participation by Rotarians (non-financial). Provide at least two (2) examples of active participation.</strong></td>
<td>Place labels in the front of the dictionaries and distribute the dictionaries to 3rd grade students</td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>--------</td>
</tr>
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<td>Yes</td>
<td>yes</td>
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<tr>
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</tr>
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<td>yes</td>
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<tr>
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</tr>
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</tr>
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<td>Disease Prevention and Treatment</td>
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<td>Water and Sanitation</td>
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</tr>
<tr>
<td>Maternal and Child Health</td>
<td>No</td>
</tr>
<tr>
<td>Basic Education and Literacy</td>
<td>yes</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----</td>
</tr>
<tr>
<td>Economic and Community Development</td>
<td>no</td>
</tr>
<tr>
<td>How will the project meet the goals of that Area of Focus?</td>
<td>Students will become better writers, spellers, and readers</td>
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<tr>
<td>Describe how the general public will know that this is a Rotary-sponsored project? Provide examples.</td>
<td>Articles in the Islander newspaper and in the school district newsletters</td>
</tr>
<tr>
<td>Yes</td>
<td>yes</td>
</tr>
<tr>
<td>No</td>
<td>no</td>
</tr>
<tr>
<td>If YES, what is the name of the organization(s) and what role does it play in the project?</td>
<td>San Mateo-Foster City School District gives approval to distribute the dictionaries</td>
</tr>
</tbody>
</table>

**CLUB PRIMARY CONTACT NAME**

Rich Mozinni

**Club Primary Contact Rotary Position**

Dictionary Project chairperson

**Club Primary Contact Email Address**

rmozzini@sanbrunocable.com

**Club Primary Contact Phone Number**

650-555-5555

**CLUB SECONDARY CONTACT NAME**

Mary Lou Griffin

**Club Secondary Contact Rotary Position**

Club President 2020-21

**Club Secondary Contact Email Address**

marylougriffin1@yahoo.com
<table>
<thead>
<tr>
<th>DISTRICT GRANT FUNDS (DDF) REQUESTED UP TO $     OF DDF AVAILABLE</th>
<th>4300</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club Funds</td>
<td>0</td>
</tr>
<tr>
<td>Other Funds - please specify source</td>
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</tr>
<tr>
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<td>yes</td>
</tr>
<tr>
<td>No</td>
<td>no</td>
</tr>
<tr>
<td>Yes</td>
<td>no</td>
</tr>
<tr>
<td>No</td>
<td>no</td>
</tr>
<tr>
<td>2020-2021 PRESIDENT NAME</td>
<td>Mary Lou Griffin</td>
</tr>
<tr>
<td>Signature</td>
<td>Mary Lou Griffin</td>
</tr>
<tr>
<td>Date</td>
<td>Tuesday January 07, 2020</td>
</tr>
<tr>
<td>2021-2022 PRESIDENT NAME (2020-2021 PRESIDENT-ELECT)</td>
<td>Curtis Chen</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Signature</td>
<td>Curtis Chen</td>
</tr>
<tr>
<td>Date</td>
<td>Tuesday January 07, 2020</td>
</tr>
<tr>
<td>ALTERNATE NAME (if 2020-2021 President-Elect is unknown)</td>
<td></td>
</tr>
<tr>
<td>Club Rotary Foundation (TRF) Chair</td>
<td>no</td>
</tr>
<tr>
<td>Community Service Chair</td>
<td>no</td>
</tr>
<tr>
<td>International Service Chair</td>
<td>no</td>
</tr>
<tr>
<td>Signature</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td></td>
</tr>
</tbody>
</table>

[CONFIRM Button]
WAIT…

BEFORE YOU HIT “CONFIRM”,

MAKE A COPY FOR YOUR FILES
Thank You

The form was submitted successfully. Thank you.

Reference number: 1D3WMDAF1DYPDFYVJCRR2PEY
STEP 4 of the District Grant process: Implement your Project!

Once your District Grant application is approved, you are ready to implement your project. **Do not begin** implementation of your project **until you have received written notification** from District Grants Coordinator Cyndy Simms that the application has been approved by the District 5150 Grants Committee and The Rotary Foundation. Notification usually occurs by September 1.

Remember:

- The Club must maintain a separate bank account for each District Grant over $2,000.

Once your project is finished, complete your Final/Interim Report online at [District Grant Final Report](#) on the District 5150 website.

1) The Final/Interim Report is due no later than May 1, 2021.
2) It is a good idea to complete the Final Report as soon as the project is finished. The Final Report can be submitted anytime prior to May 1, 2021.
3) If your project covers more than one Rotary Year (July 1st to June 30th), you must file an Interim Report for the first year of the project.
4) All District Grant projects must be completed by April 30 of the second Rotary Year of the project.
5) If the project spans a second Rotary Year, the Final Report must be submitted by May 1, 2022.

Once your project is finished, complete your Final/Interim Report online at [District Grant Final Report](#) on the District 5150 website.

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4) All District Grant projects must be completed by April 30 of the second Rotary Year of the project.
5) If the project spans a second Rotary Year, the Final Report must be submitted by May 1, 2022.
REMEMBER...

- **THE FINAL/INTERIM REPORT MUST INCLUDE RECEIPTS FOR THE PROJECT’S COSTS**

  ~**AND**~

- **SIGNATURES FROM BOTH THE 2020-2021 PRESIDENT AND PRESIDENT-ELECT**
REMINDER!

2019-2020
FINAL REPORT DUE
MAY 1, 2020
QUESTIONS?

Contact District Grants Coordinator
Cyndy Simms
districtgrants5150@gmail.com
909-544-9966
People with Passion,
People of Action,
can change the world
GRANT MANAGEMENT TRAINING for 2020-21

Congratulations!

Thank You!