Rotary District 5495
District Grant Funding Request Guidelines 2021-2022

The District Grant is a once per year block grant of funds from the Rotary Foundation to District 5495. Rotary Clubs in District 5495 can request funds from this block grant to support qualified local or international projects led by the club. The following are the guidelines, requirements, and process for clubs to request funding from this block grant:

1. All District Grant funding requests must meet The Rotary Foundation requirements for District Grant spending as defined in the document: **Terms and Conditions for Rotary Foundation District Grants and Global Grants** (https://my.rotary.org/en/document/terms-and-conditions-rotary-foundation-district-grants-and-global-grants)

2. Clubs must be "qualified" to manage Rotary Foundation funds before requesting funds from the District Grant. To be qualified, a club must:

    a) Agree to implement and sign the Rotary Foundation Memorandum of Understanding for clubs. This includes the implementation of a club financial management plan for administration of grant funds. Note: A separate bank account is only required for Global Grant funds and not required for District Grant funds. However, separate accounting of Rotary Foundation funds is mandatory in all cases.

    b) Appoint a Club Rotary Foundation Chair to a 3-year term.

    c) Have at least two members attend the District Foundation Grants Seminar annually. It is highly recommended that the President-Elect and Club Rotary Foundation Chair attend. Note: The Club can send as many participants as desired.   Training will be offered online during Spring 2021; no in-person sessions are scheduled.

    d) Be current on its RI and District dues, and in good standing with the District, Rotary International, and The Rotary Foundation.

    e) Be current on all required tax returns for the Rotary Club.

    f) Have established and reported an annual giving goal to the District Foundation Chair for the current year and for the next year by May first.

    g) Have contributed to the Rotary Foundation Annual Giving Fund in the previous year or the current year.

    h) Have, by January 1st of each year, reported its Club President-Elect to the District and to Rotary International.

    i) Be current on all Rotary Foundation Grant reports, including 2020-21 District Grant reports.

3. General Guidelines:

- Application deadline is May 31, 2021 for Grants awarded in the 2021-22 Rotary year.

- Projects which are excluded under section III of the **Terms and Conditions for Rotary Foundation District Grants and Global Grants** will not be approved.

- Projects must be completed, including expenditure of all funds and submission of the final report with all receipts for spending, prior to April 30, 2022.

- Funds can be requested for local or international projects. An international partner Rotary club is not required but it is recommended for international projects.

- Funds cannot be requested for any projects which have already been started. Grant funds cannot be used to reimburse funds which have already been expensed.

- Requests for funds are competitive and limited. It is anticipated that not all applications will be funded and that some requests may be partially funded. Clubs should not commit any funds to projects until they have been approved.

- Maximum grant amounts are determined by giving.
  - Clubs which have given something to the Rotary Foundation in the 2020-2021 or 2021-2022 Rotary year are eligible for $500 in grant funds.
  - Clubs which have reached $100 per capita giving to the Annual Fund in the 2020-2021 or 2021-2022 Rotary Year are eligible for a maximum of $2500 in grant funds.

- Larger grants may be made for projects funded and implemented by more than one District 5495 Club.

- Clubs will be expected to provide at least 1/3 of the funds used in a project. For example, on a $3,750 project, the club would provide $1,250 and funding from the District Grant would provide $2,500.

- Clubs may submit more than one project for consideration; however limited available grant funds may preclude the approval of more than one project. Clubs will not be awarded two projects unless there are available funds left after all other qualified club's first projects have been approved. If a club submits more than one application, it will be important to identify the project which is their first priority.
- Collaboration with other Rotary Clubs and civic organizations is encouraged.

4. Funding Decisions and Criteria for Approval

- Decisions on funding will be made by the District 5495 Rotary Foundation Committee.

- Projects which are sustainable are encouraged. The Rotary Foundation defines sustainability as the capacity for maintaining outcomes over the long term to serve the ongoing need of a community after grant funds have been expended. A sustainable project typically involves local community leaders in planning so that they are invested in the project's long-term success. Training and the exchange of information prepare

communities to maintain results and solve problems on their own, after the Rotary club's involvement has ended. Sustainable projects offer enduring value and a greater return on Rotary's investment of money and volunteer hours.

5. Application Process

   Applications should be made at Rotarygrants.org (instructions below)
   Please contact Rebecca Wilks with questions. info@drwilks.com

Website Instructions

Signing MOU
- From the Main Page, select "My Account."
- Under Administration Functions, Click on "Club Qualification"
- Click on your Club
- Start the Signature Process

Submitting a Project
- From the main page, click on "District Grants"
- Click on the "Submit Project" tab
- Read instructions carefully.
- Proceed to the application process by clicking on "Submit New Project"
  Complete the requested information. The project description should include the following information:
  a. Other Rotary Clubs involved in the project if it is a joint club project.
  b. A complete description of the project objectives including how the project will benefit the community and/or improve the lives of the less fortunate.
  c. Describe the non-financial participation by Rotarians in the project (i.e., specific Rotarian activities).
  d. Describe how the public will know this is a Rotary-Sponsored project. Please provide details, e.g., publicity in a newspaper, radio, television, display of the Rotary wheel.
  e. If the project involves a cooperating organization, please provide the name(s) of the organization(s).   By submitting this application, the Rotarian sponsors endorse the organization as reputable, responsible, registered with the project country, and acting within the laws of the project country.
  f. If your club is submitting multiple applications, please specify whether this is your first priority.
- Click "Save".
- The project will receive a unique project number and you will be taken to the Project Summary Page.
- If you do not already have an account for the website, a password will be emailed to you when you save your first project. Your login to the site is your email address and this

password. Please keep this information accessible for future use whenever you are using this website.

- Login to your account by clicking on "My Account"
- Select the project you just saved.
- Click on "Administration" button.
- Click on the "Documents" tab.
- Optional - Upload any other documents that would help to support the project proposal. Note: all files must be in pdf format.
- Click on the "History Logs" tab.
- Under the section titled: "Add People to the Distribution List / Give Administrative Access", add additional names that should sign the project or have access to the project. This needs to include the name of every club president involved in the project if it is a multi-club project.
- The project will be reviewed by a District committee member and if all information is complete, it will be published. Once published, you will be given an email notification.
- Once published, return to the website and login.
- Click on the "Administration" button.
- Click on the "Description" tab.
- Click on "Start "Club Signature Process"
  Check all users that need to sign the project: This must include all club presidents for every club involved in the project if it is a multi-club project. It also needs to include Rebecca Wilks, the District Grants Chair.

6. Reports
- Clubs receiving District Grant funds must provide a short final report of project outcomes to the District Grant Chair. The report can be found in the District Grant application addendum. Upload the completed and signed report in PDF format to the documents section of your grant page on Rotarygrants.org
- Scan receipts related to all project spending of District Grant funds into pdf format and include as attachments to the final report.
- Final grant report, including completed report form and receipts are due April 30, 2022. Failure to comply with reporting requirements will disqualify the club from future grant opportunities until the reports are submitted.

7. Timeline
a) The deadline for submitting funding requests for the 2021-2022 Rotary year is May 31st, 2021. Late applications will be considered only if funds are not completely allocated to projects whose applications were submitted and club qualification requirements met before the deadline.

b) The District Rotary Foundation Committee will meet as soon as practical after the deadline to develop a spending plan for District Grant funds.

c) A spending plan will be posted on the District 5495 website. Funding approval will not be final until the District Grant has been approved by The Rotary Foundation.

d) The District 5495 Grants Chair will apply for the District Grant using the approved District Spending Plan as soon as possible following the Committee's Resolution.

e) Funding for approved projects will be sent to clubs as soon as funds become available from The Rotary Foundation.