



District 5160

Making Grants Easy and Successful

Arne Gustafson, Grants Committee Chair



District 5160 2023/24 Grant Policy Document

- Additional Review for grants outside the District funded by DG DDF.
- Developing Criteria for Rotaract grants
- Draft application due May 24, 2023; Final application due June 24, 2023.

The Policy Document is on the District Website.

WHAT IS DDF AND WHERE DOES IT COME FROM?

- Half the funds contributed to the Annual Fund are returned to the District after 3 years.
 - ✓ 1/2 go to Global Grant matches (GG DDF)
 - ✓ 1/2 go to District Grant matches (DG DDF)

**We estimate there will be \$177,399
Available for DG DDF in 2023/24**

DISTRICT GRANTS DG DDF



WHAT CAN DISTRICT GRANTS BE USED FOR?

1. Projects that can benefit local communities.
2. Project Fairs.
3. Community Assessments for Global Grants.

WHAT CAN DISTRICT GRANTS BE USED FOR?

District Grants can also be used for projects outside the U.S. but they are not intended to be used as a substitute for Global Grants

- Explain why the project cannot be developed within the scope of a GG
- Contact Grant Committee Chair for guidance if there are questions.

WHAT CAN DISTRICT GRANTS BE USED FOR?

PLEASE REVIEW THE ROTARY FOUNDATION TERMS AND CONDITIONS DOCUMENT. IT INCLUDES ADDITIONAL IMPORTANT INFORMATION ABOUT WHAT GRANTS CAN AND CANNOT BE USED FOR.

<https://my.rotary.org/en/take-action/apply-grants/district-grants>



DISTRICT GRANT APPLICATION TIMELINE

1. DRAFT SUBMISSION IS DUE ON MAY 24, 2023
2. FEEDBACK PROVIDED IN EARLY JUNE
3. FINAL SUBMISSION JUNE 1 TO JUNE 24, 2023
4. GRANT REVIEW PANEL MEETS MID-JULY

DISTRICT GRANT APPLICATION TIMELINE

5. TRF APPROVES BLOCK GRANT TO DISTRICT

6. CLUBS ARE NOTIFIED – USUALLY IN AUGUST
OR EARLY SEPTEMBER

**DDF IS AWARDED AS A BLOCK GRANT – ALL
PROJECTS ARE APPROVED AND AWARDED AT
ONE TIME**

DISTRICT GRANT QUALIFICATION CRITERIA

1. Application adheres to the Terms and Conditions for Rotary International District Grants
2. Application meets qualification requirements of the Club MOU and Grant Training
3. Disclose potential conflicts of interest
4. Certify that primary and secondary contact have read District Grant Policy Document
5. Certify that the Club Board of Directors, Club President and Club President Elect have approved the grant request.
6. Submit Club MOU and enter Foundation Goals in My Rotary



DISTRICT GRANT EVALUATION CRITERIA

1. Completeness
2. Value to Community
3. Feasibility
4. Sustainability
5. Visibility
6. Community Support
7. Funding Sources

IMPORTANT THINGS TO REMEMBER

1. Grant funds cannot reimburse funds that have already been spent.
2. All costs must be paid from the grant; you cannot make a donation to another organization.
3. Grant funds cannot be used to fund ongoing operating expenses of another organization.

Read the Rotary Grants Terms and Conditions!



FUNDING OF DG DDF PROJECTS

1. Single club awards limited to \$10,000.
2. Additional \$5,000 with 2 or more participating clubs (Rotaract clubs qualify).
3. Every \$1 in DDF must be matched by \$0.50 in other funds.
4. Up to \$5,000 for Community Assessments.
5. Up to \$2,500 for Project Fairs.

LIMITS ON DG DDF AWARDS

- DG DDF has been over-subscribed the past two years. Review Panel may have to use its discretion to allocate funds.
 - a. Reject individual grants.
 - b. Reduce awards by arbitrary or pro rata amounts

YOU MUST ANSWER QUESTION 10 (c)
REDUCTION IN GRANT FUNDS

HELPFUL HINTS

1. Start the planning process now. You can initiate your application March 1st.
2. Form a committee to develop grant ideas.
3. Assign application preparation to one person.
4. Only the lead club should access the application.

HELPFUL HINTS

5. Make sure your project is ready for funding!!!! Earmarking money for future plans does not make a strong project.
6. Your application is not complete without:
 - The often neglected MOU - the contract between TRF and the Club
 - Your Club's Foundation Goals entered into RI Club Central

HELP!!!!!!

WHY CAN'T I ... I DON'T KNOW HOW TO...

- ✓ Did you (your president, grant leader) attend **Grant Training?**
- ✓ Did you **read our emails** ?
- ✓ Did you **go online** for help ?
- ✓ Did you contact a member of the **grants team** ?

I DON'T HAVE TIME IS NOT THE RIGHT RESPONSE

HELP!!!!



GRANT NAVIGATION

- Grant Overview
- Budget Overview
- Grant Dashboard
- District Grant View
- AREA 0 Grants
- Club Grants View
- Grant Secure Files
- Admin
- Help
 - Release Note -- Funding
 - Submitting a Club Grant
 - Email District for Help!
 - District Documentation
 - Club Documentation
 - Grant Setup

Getting Started Videos

- Grant 1 Video
- Grant 2 Video

District Grants [2022-23]

search..

Show Grant Round: All Grant Rounds [Change OrgYear](#)
 Show Deleted?

A summary is shown below of all grants submitted to the District. **Click on the Project Name to view** below.
 When more than one club is working on together on a Grant, the sponsor club is designated (*) below.
Click on \$ below, to fund the Club grant. This will open a dialog where the *Amount* and *Check No* can be entered.

Approved

<input type="checkbox"/>	Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
		2022-23 HRC Engineering Club Project	13649	Alamo Albany Berkeley Hercules (*) Pinole	Approved Grant	5,000.00	5,000.00	3,500.00	8,500.00
No Grants: 1						5,000.00	5,000.00	3,500.00	8,500.00

District Review and Approval

<input type="checkbox"/>	Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
		AED's For Key Paradise Facilities	13642	Paradise	Submitted Grant for District Approval	0.00	3,160.00	4,120.00	7,280.00
		Antioch Middle Schools First Tee	14152	Antioch (*) Delta (Antioch)	Submitted Grant for District Approval	0.00	5,162.50	6,087.50	11,250.00



HELP!!!!

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 - Grant 2 Video
- My CLUB Shortcuts
- DISTRICT Shortcuts




Club Orland Grants [2023-24]

A summary is shown below of all grants submitted to the District from this Club.
When more than one club is working on together on a Grant, the sponsor club is designated (*) below.
Click on \$ below, to fund the Club grant. This will open a dialog where the Amount and Check No can be entered.

Change OrgYear

New Club Grant Request - Click Here to Create Grant

Club Process

Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
  	Pipeline To Success - Sample Grant	15801	Benicia Chico Orland (*) Woodland Sunrise	Draft	0.00	11,000.00	6,000.00	17,000.00
No Grants: 1					0.00	11,000.00	6,000.00	17,000.00



HELP!!!!

Rotary  | My Rotary

Donate

Join



HOME | EXCHANGE IDEAS | TAKE ACTION | LEARNING & REFERENCE | MANAGE | **THE ROTARY FOUNDATION** | NEWS & MEDIA | MEMBER CENTER

- Apply for Grants > District Grants
 - Give > Global Grants
 - Raise for Rotary
 - About
 - Foundation Reports
 - History
- Programs of Scale Grants
- Grant Center



HELP!!!!

ASK FOR HELP

A COMPELLING GRANT = GRANT FUNDING

Grant Committee Chair - Arne Gustafson at arne5160.grants@gmail.com

Grant Manager - Danie Schwartz at info@danieschwartz.com

Grant Stewardship - Jahn Martin at stewardship@rotary5160.org





GLOBAL GRANTS

GG DDF



GLOBAL GRANT FUNDING SOURCES

1. Club contributions (individual or multiple clubs).
2. Project partners.
3. District Designated Funds (GG DDF).
4. Rotary Foundation

HOW THE MATCH WORKS

- District matches club contributions.
 - ✓ For every \$1 in club, or other funding sources, the District can provide up to \$2 in DDF
- TRF can match up to 80% of DDF
 - ✓ \$2 in DDF = \$1.60 in TRF funds

\$1 IN CLUB FUNDS = \$3.60 FOR YOUR PROJECT



FUNDING FOR GG DDF PROJECTS

Estimate \$155,881 of incremental GG DDF, plus any roll over from prior year.

- Up to \$20,000 GG DDF for initiating club.
- Up to \$5,000 in GG DDF for each additional club to a project maximum of \$40,000 (additional clubs must contribute at least \$500 each).
- For every \$1 in GG DDF project must include \$0.50 in other funds (exclusive of TRF funds).



FUNDING FOR GG DDF PROJECTS

Funding May Also Be Available for Projects Where a D 1560 Club is neither the International or Host Club.

- A GG DDF limit of \$10,000 per club per year.
- A limit of \$10,000 per year on project requests from the District Governor, District Foundation Chair or District Committee.
- A limit of \$100,000 in total for these grants.

GLOBAL GRANT APPLICATION PRELIMINARY STEPS

1. Be sure you have your club's support.
2. Seek other club partners.
3. Establish and confirm Host Club partnership.
4. We Recommend Applicant and Project Committee complete TRF's online Grant Management Training (approx. 3 hours).

GRANT APPLICATION – TWO STEP PROCESS

1. Go to “rotary5160.org” and download the “Global Grant Request Form”

- Fill out the form. This information is used to reserve GG DDF funds for your project.
- The information will help the Grant Review Committee members understand why it is a grant that merits an allocation of GG DDF.

Grants

Stewardship

Polio

Contribute

Endowment

RI Support Center

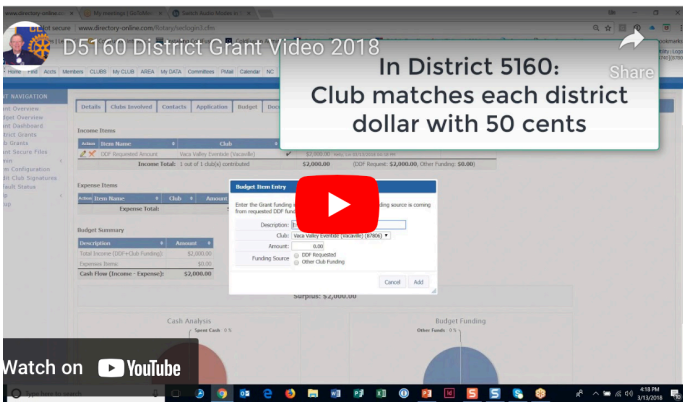
Foundation Day

Foundation

Archives

Kathy Suvia
District Governor
2021-2022

Governor's Message



Grants

The District works hard to provide your club the tools you need to request and obtain DDF grant funds.

[CLICK HERE](#) for the 2022-2023 **DDF and Grant Policy**.

[CLICK HERE](#) for the 2021-2022 **DDF and Grant Policy**.

[CLICK HERE](#) for the 2020-2021 **DDF and Grant Policy**.

[CLICK HERE](#) for the **DDF and Grant Policy Archive**

[CLICK HERE](#) for the **District Grant Application**

[CLICK HERE](#) for the **Global Grant Process**.

First, complete the Global Grant DDF Request Form located [HERE](#) then email the completed form in Word to Arne Gustafson at arne5160.grants@gmail.com

[CLICK HERE](#) for the updated Global Grant DDF Request Form.

[CLICK HERE](#) for **Project Fair**

District Grant On Line Module Training – Getting Started Video for Grant Writers is to the left.

For more information about Grants please visit Rotary.org

You can also contact Grants Committee Chair Arne Gustafson arne5160.grants@gmail.com



Global Grant Process

To apply for a Global Grant after December 1, 2018, you will proceed through a two-step process.

First, complete the Global Grant DDF Request Form located [HERE](#) then email the completed form in Word to Arne Gustafson at arne5160.grants@gmail.com.

Second, go to Rotary.org and follow these steps:

- . Go to rotary.org.
- . Log into "My Rotary".
- . In "The Rotary Foundation" drop down list, click on "Grant Center".
- . At the top of the page click on "Apply For A Grant".
- . In the "Select Grant Type" Drop Down Box, Click on "Global Grant".
- . Click "Let's Begin".
- . The next page will be the Global Grant Application and along the right side of the page, you will find the "Global Grant Calculator".

After you complete the Global Grant Application, you can save the application as a pdf. (See the screenshot below to for how to do this.)

Go to the right hand side of the screen of the application and click "Print Application(PDF)" and then go ahead and save it.

Send the PDF of the Global Grant Application, the completed Global Grant Calculator, and your club's three year history of giving to The Rotary Foundation (total Foundation giving, AND Per Capita Giving for the 2018-19 and 2020-21 Rotary years) to District 5160 Grants Committee Chair, Arne Gustafson at arne5160.grants@gmail.com



DISTRICT 5160 GLOBAL GRANT DDF REQUEST FORM

- 1. Project title:**

- 2. Proposed starting and ending dates:**
Starting:
Ending:

- 3. Location of project:**

- 4. Area(s) of TRF focus:**

GRANT APPLICATION – TWO STEP PROCESS

After you have been advised that GG DDF has been reserved for your project, apply to The Rotary Foundation.

- At rotary.org: click “My Rotary”.
- Click “Rotary Foundation”
- Click “Global Grants”

Then follow the instructions!



CREATE A COMPELLING GLOBAL GRANT

HAVE QUESTIONS? NEED HELP?
THERE ARE EXPERIENCED 5160
ROTARIANS WHO ARE AVAILABLE TO
ANSWER YOUR QUESTIONS AND PROVIDE
ADVICE!





Rotary

