GRANT MANAGEMENT SEMINAR

DISTRICT 5160

January 28, 2023

Rotary

2023

GRANT QUALIFCATION

QUALIFICATION REQUIREMENTS

- 2023-24 & 2024-25 Club Presidents must agree to the Club Memorandum of Understanding and submit signed MOU to District Stewardship Chair

- Load signed MOU onto DACdb grants module.

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QUALIFICATION REQUIREMENTS

- Be current on its dues, in good standing with the District 5160 and RI

- Be current on its tax returns

- Be current on all District and Global grants (reports, financial, close out)

TRAINING REQUIREMENTS

- One member of the club must have attended the Grants Management Seminar after January 1, 2023 for the club to qualified for the 2023-24 Rotary year
- All interested club members are welcome to attend training

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TERMS OF QUALIFICATION

- Valid from July 1, 2023 to June 30, 2024
- Club responsible for grant funds
- Disclose conflicts of interest
- Cooperate with all audits
- Implement the club MOU
- Club may apply for grants prior to being qualified, but no grants will be awarded before a club is qualified
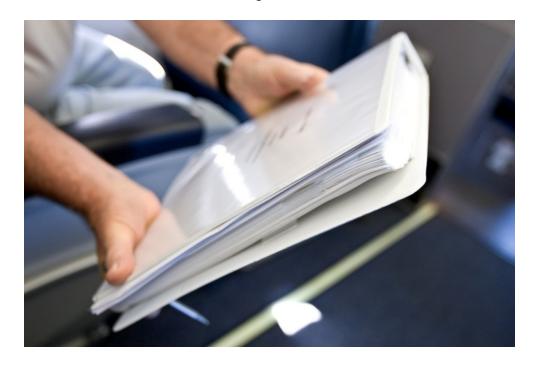
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MAINTAINING QUALIFICATION

- Follow terms of club MOU
- Appoint a club member or committee to manage club qualification
- Fully implement stewardship practices to prevent misuse of funds

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DOCUMENT RETENTION

- Provide access to documents for transparency

- Retain for a minimum of five years

- Make copies

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ONLINE DISTRICT GRANT APPLICATION

- Clubs will use the DACdb grant module linked to the district website to apply for District DDF grant funds.

- Clubs must prepare a Pre-Submittal application for review beginning May 1, 2023 and ending May 25, 2023

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2023

ONLINE DISTRICT GRANT APPLICATION

- Final grant applications must be submitted beginning June 1, 2023 and ending June 25, 2023 and should include answers to all questions submitted by the grant review panel

- District Grant Review Panel will meet in July and determine grants approved and amounts awarded

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GLOBAL GRANT APPLICATIONS

- Global grant applications can be submitted through out the Rotary year (July 1 through June 30)

- Global grants applications will be approved on a rolling basis throughout the Rotary year

- Global grant applicants first submit a Global Grant DDF Request Form to the Grants Committee Chair

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GLOBAL GRANT APPLICATIONS

- District Grant Review Panel will review the request form and submit recommendations to the Grant Approval Committee

- Once approved the Global Grant draft application must be submitted to The Rotary Foundation within 90 days and District DDF funds will be earmarked for the Global Grant

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Resources Available on RI Website Under My Rotary

- Club Memorandum Of Understanding
- Club Memorandum of Understanding Resource
- Club Memorandum of Understanding Worksheet
- Terms and Conditions For Rotary Foundation District and Global Grants
- Guide to Global Grants

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GRANT REPORTING REQUIREMENTS

Financial Management Plan

- Separate bank account for funds
- Distributing funds
- Use checks or bank cards to track funds
- Detailed ledger or spreadsheet

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GLOBAL GRANT REPORTS

Timeline for reporting:

- Progress reports within 12 months of first payment

- Every 12 months through the term of the grant

- Final report within two months of completion

DISTRICT GRANT REPORTS

- Progress report is due within 12 months of receiving funds
- Final report is due within 2 months of completion (project must be complete within 24 months of receiving funds)
- Load report onto DACdb grants module

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District Grant Reports

Reports to include the following information:

- Purpose of the grant
- Project/activity goals and evaluation of how they were accomplished
- Description of how partners were involved in the grant
- Number of project/activity beneficiaries and how they benefited
- Amount of club and outside funds raised versus projected amount
  in application
- Role of cooperating organizations
- How was the project/activity promoted
- Itemization (spreadsheet) of funds raised, how the funds were spent,
  including identity of vendors
- All bank statements for project-specific account where District Grant funds
  were deposited.
- Copies of all paid invoices or other supporting documentation of amounts expended on the grant.
- Pictures
- Newspaper articles