GRANT MANAGEMENT SEMINAR

DISTRICT 5160

January 28, 2023
GRANT QUALIFICATION
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.
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)
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.
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
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
DOCUMENT RETENTION

- Provide access to documents for transparency
- Retain for a minimum of five years
- Make copies
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.
• 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
GLOBAL GRANT APPLICATIONS

• Global grant applications can be submitted throughout 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
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.
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
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
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