

# District 7010

## Rotary Foundation Grants Training

### Module 2 - District Grants

2024-2025 Edition



# Introduction



The District Grants Program allows Clubs to apply for funding from District 7010's *District Designated Fund* to help finance relatively small, short-term activities and projects that address the needs of a local, national or international community.

Those activities and projects help Rotarians contribute to world understanding, goodwill, and peace by improving people's health, supporting education, and alleviating poverty.

# District Grants Program Funding for RY 2024-2025



For Rotary Year 2024-2025, District 7010 will match Club project investments 2:1 to a maximum of \$3,000 CAD.\*

## Examples:

- \$500 (club) + \$1,000 (district grant) = \$1,500 total funds
- \$1,500 (club) + \$3,000 (district grant) = \$4,500 total funds
- \* When clubs collaborate on a project, only 1 club can receive district grant funding

# District Grants Program Funding for RY 2024-2025



For Rotary Year 2024-2025, District 7010 will offer 3 grants to a maximum of \$5000 to fund slightly larger projects. Three will be selected – those not selected will be considered for up to \$3000 in matching funds from the District.

Match formula for project funded to \$5000:

- 1<sup>st</sup> \$1,500 (club) + \$3,000 (district grant) = \$4,500 total funds
- Next \$2,000 (club) + \$2,000 (district grant) = \$4,000 total additional funds (1:1 match for this next level of funding)
- Total project - \$3,500 (club) + \$5,000 (district grant) = \$8500 total funds

# District Grants Program Funding for RY 2024-2025



## 3 or 3 Guideline

In the Rotary International Terms and Conditions, District Grants are not to provide continuous or excessive support to any one person, entity, or community. To more easily comply with this requirement, a new policy entitled '**3 or 3**' is being piloted within District 7010 for the 2024/25 Rotary year. A club will be able to apply for funding of a substantially similar project for a maximum of three consecutive years. Alternatively, up to three different club applications towards a single project will be considered for District Grant approval in the same year. In short, one of the '3 or 3' scenarios could be considered for approval, but not both.

# District Grants Eligible Activities



District grants program can fund:

- Humanitarian projects
- Educational programs and scholarships
- Cultural and language training
- Research on global grant projects
- Construction or renovation projects... and more

# District Grants Training Learning Objectives



## Learning Objectives:

1. Know how clubs become qualified for district grants
2. Be familiar with the lifecycle of district grants
3. Understand the elements of district grant program processes
4. Learn about district grant program oversight, contacts and resources

# How Clubs qualify for District Grant funding



Clubs must be “qualified” each year... that means:

1. Club President and President-Elect sign a Memorandum of Understanding (MOU) with District 7010\*
2. Club has no outstanding dues or debts with District 7010 or RI
3. Club Rotary Foundation Chair’s name is posted in Club Runner and on the club *website*...

\*If one of these positions is vacant another club officer with signing authority for the club may sign the MOU.



# How Clubs qualify for District Grant funding



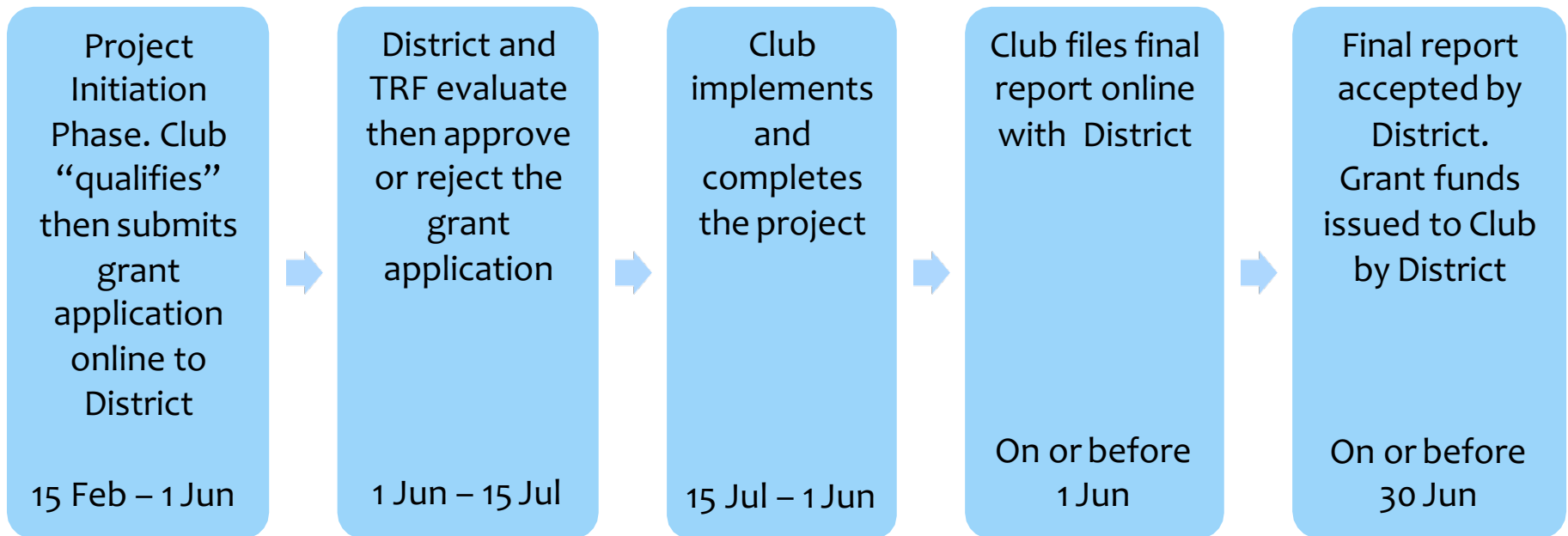
## Club “qualification” (continued)...:

4. Contribution goals to the *Annual Fund* and the *Polio Plus Fund* are posted in *Rotary Club Central*
5. A least 2 club members complete district grant “management training” for the grant project implementation year
6. Club membership includes 2 club member who have completed district grant training for the Rotary year in which the project is completed.
7. Club has no Rotary Foundation grant reports overdue.

# Lifecycle of District Grant Projects (from the club perspective)



Process begins in February and ends 17 months later, on June 30<sup>th</sup>



# District Grant Project Initiation Process (Jan – May)



Step 1: Clubs cultivate ideas for a district grant project, then

Step 2: Contact District Grants Chair to be assigned a mentor

Step 2: Confirm proposed project adheres to Terms and Conditions for Rotary Foundation Grants, then

Step 3: Take steps to get the Club “certified” (eligible) to receive district grant funding, then

Step 4: Finalize project details and create a budget, then

Step 5: Apply for district grant funding by 1 June.

# District Grants Program Application Process



- Get paired with a *District Grant Mentor\** to help the Club complete the application process before the **1 June deadline**
- Applications are submitted by clubs using District 7010's online grant management system, which is accessed through the District's website

\* contact *District 7010's District Grants Sub-Committee Chair* to arrange mentor services

# District Grants Program Application Approval



- Completed applications are processed by the District Grants Sub-Committee and, when approved by the Foundation Committee and reviewed by district leadership, are sent to The Rotary Foundation as part of the District's annual district grant funding application
- When District's funding request is approved by The Rotary Foundation, District 7010 will inform the Club that their project can proceed

# District Grants Program Project Implementation



- Project activity (planning excepted) and spending must not occur before “go ahead“ is received from District
- Clubs must pay vendors or service providers directly or, on presentation of proof of purchase, transfer funds to non-Rotary project partners for expenses incurred
- Clubs should not transfer funds to non-Rotary project partners in faith that the funds will be used appropriately

# District Grants Program Project Implementation



- Project activity must be completed in time to file final report before the June 1 final report submission deadline
- Club retains all project invoices and payment receipts
- Club obtains minimum of 2 pictures that show the essence of the project and visually connects Rotary to the project

# District Grants Program Project Implementation



## *Best Practices:*

- *Club pays vendors or service providers directly or, on presentation of proof of purchase, transfers funds to non-Rotary project partners for expenses paid*
- *Clubs should not transfer funds to non-Rotary project partners (expecting that the funds will be used appropriately).*



# District Grants Program Final Report & Payment



- Clubs must file a complete final report online on or before 1 June of the project implementation year\*
- Final report includes; short written report, financial summary, invoices, expense payment receipts and photos)
- District 7010 issues grant funds when the Club's final report is accepted by the District Grant Sub-Committee

\* implementation years start 1 July and end the following June 30<sup>th</sup>

# District Grants Program Oversight



- District 7010 *Stewardship Committee* provides oversight of all Rotary Foundation funds issued by the District
- Clubs and Rotarians participating in the district grant program are responsible for maintaining good financial control of all Rotary Foundation and project monies.

# District Grant Program Contacts



For more information about district grants or to have your Club paired with a *District Grant Mentor* contact:

Drew Markham  
District Grants Sub-Committee Chair  
[drwolverine@gmail.com](mailto:drwolverine@gmail.com)



# District Grants Program Resource Documents



## *Links to Resource Documents:*

- *[Terms and Conditions for Rotary Foundation Grants](#)*
- *[District Grant Memorandum of Understanding \(MOU\)](#)*
- *[District Grants Management System User Guide](#)*
- *[District 7010 – Foundation Committee Financial Management Plan](#)*

# District Grants Training Summary



Now you know...

1. The things clubs must do annually to become eligible for district grant funding
2. About the lifecycle of district grants
3. Details about district grant project initiation, application, project implementation, reporting and payments processes
4. About District Grant Program oversight, contacts and resources

# District Grants Program Training



Congratulations! You have completed the District's 2024-2025 District Grants Program qualification training module. You are now prepared to finish your annual qualification training by successfully completing a 10 question quiz about the material covered in this module.

Any questions contact [drwolverine@gmail.com](mailto:drwolverine@gmail.com)

To advance to the quiz [CLICK HERE](#).