

Requirements to Submit a Grant Request to District 5930 for Consideration for Funding in 2023-2024

District Rotary Foundation Team Seminar
18 February 2023

Important Information for Today's Seminar Participants

To be qualified to submit a District Grant or Global Grant application for 2023-2024 for consideration, Rotary clubs and Rotaract Clubs must:

- Submit their Individual Project Report for 2022-2023 through Clubrunner by 15 June 2023, if the club was awarded a district grant for 2022-2023 (attach at least 1 photo and relevant documents, e.g., receipts, bank statements, etc. to demonstrate impact of the grant and that funds were used for their intended purpose.)
- Have at least two members participate in District Grant Management training in Spring 2023. One must be the President for the year of the grant (2023-2024).
- Ensure that the 2023-2024 club President & President-Elect sign and submit the 4 required documents to the District Grants Subcommittee Chair Eddie Bartnesky at eddie@connellybartnesky.com prior to submitting a grant request.

Grant Management Training Schedule for Spring 2023

- 4 March 2023: ZOOM 8:30-9:30 a.m. Refresher*; 10:00 a.m.-12:00 noon Complete** Session Training
- 25 March 2023: Zoom 8:30-9:30 a.m. Refresher*; 10:00 a.m.-12:00 noon Complete** Session Training
- 15 April 2023: Zoom 8:30-9:30 a.m. Refresher*; 10:00 a.m.-12:00 noon Complete** Session Training
- 28 April 2023: in-person; at immediately prior to District Conference (details are forthcoming)
- 6 May 2022: Zoom 8:30-9:30 a.m. Refresher*; 10:00 a.m.-12:00 noon Complete** Session Training

***Refresher:** For Rotarians who completed Grant Management Training in Spring 2021/2022. List of individuals who qualify will be disseminated prior to each Grant Management Training date.

****Complete:** For Rotarians & Rotaractors who did not participate in Grant Management Training in Spring 2021/2022

Required Documents from District 5930 Rotary Clubs and Rotaract Clubs to Apply for a Grant for 2023-2024

Documents to be signed by Club President & President-Elect of grant year and submitted to Eddie Bartnesky, District Grants Subcommittee Chair, are:

- *Club Qualification Memorandum of Understanding*
- *Rotary Club Addendum to Memorandum of Understanding*
- *Club Financial Management Plan*
- *Investigating, Reporting, and Resolving Allegations of Misuse or Mismanagement of Grant Funds*
- **These documents and other grant resources are available at**
DDF – District Grants <https://www.rotary5930.org/page/ddf-district-grants>

Key Points from *Club Qualification Memorandum of Understanding*

Club needs to:

- Ensure two club members (one must be Club President for RY of grant, e.g., 2023-2024) complete Grant Management Training
- Ensure grant funds are used for the purposes specified in the approved grant proposal
- Identify at least one person to ensure that the grant is implemented in the manner described in the grant proposal.
- Establish and maintain an inventory system to accurately record and track the resources purchased through grant funds
- Have a bank account for the grant and have two signatories sign for grant expenditures.
- Maintain copies of receipts, invoices, bank statements, etc. to document that funds are spent in a manner consistent with the objectives of the grant.
- Ensure that all individuals involved in the grant conduct their activities in a manner that avoids any actual or perceived conflict of interest.

Key Points from *Addendum to Memorandum of Understanding*

Club needs to:

- Appoint a Club Rotary Foundation Chair to a 3-year term
- Be current on its RI and District dues
- Be current on all tax returns required for the Club
- For Rotary, Form 990, 990-EZ, or 990-PF is due November 15, since our fiscal year ends June 30.
- Be current on all Rotary grant reporting requirements, if the club has a District or Global grant
- Establish and report an annual giving goal to The Rotary Foundation on Club Central for RY 2023-2024 by 01 July 2023.

Key Points from *Club Financial Management Plan*

Club needs to:

- Maintain an accurate record and appropriate documents of all income and expenditures pertaining to the grant
- Ensure that grant funds are disbursed only to approved individuals and/or beneficiaries indicated in the grant proposal

Key Points from *Investigating, Reporting, and Resolving Allegations of Misuse or Mismanagement of Grant Funds*

- An allegation of misuse or mismanagement of The Rotary Foundation (TRF) grant funds may be made by a Rotarian, beneficiary, cooperating organization, or any other individual involved in or aware of grant activities.
- Allegation should be made in writing and sent to the District 5930 Rotary Foundation Team Chair (DFTC) as soon as possible for consideration and further action, as determined to be appropriate.

Pre-requisites to Submit a Grant Application

- Clubs are to report their annual giving goal to The Rotary Foundation on Club Central for Rotary Year (RY) of the grant by 01 July 2023.
- Clubs are encouraged to contribute to The Rotary Foundation to the extent possible.
- Report by 01 Jan of each year the name of the club President, President-Elect, Secretary, Treasurer, and Chairs for Foundation, Membership, and Public Image Committees for the following year to the District Secretary & Rotary International (RI)
- Clubs' contributions to The Rotary Foundation will be among the criteria considered to allocate funds to support grant requests.

Grant Management Certification/Qualification of Clubs

- Club qualification to Submit a Grant to District 5930: Valid for one Rotary year
- Disclose potential conflicts of interest
- Document use of grant funds consistent with the grant's objectives
- Ensure timely reporting of grant activities

QUESTIONS