



The Rotary Foundation (TRF) and/or Rotary District 5080 (D5080) may modify the terms and conditions and/or addendum at any time, so always refer to the most recent version.

D5080 ADDENDUM TO TERMS AND CONDITIONS FOR ROTARY FOUNDATION DISTRICT GRANTS

Additional grant resources: D5080 Policy Manual Sections 9.03-9.04, TRF Code of Policies Sections 33.040/33.060/34.010, and the Club Qualification Memorandum of Understanding (MOU)

D5080 District Grants

In D5080 Rotary Clubs and Rotaract Clubs may apply for district grants in two categories:

- a. District Grant for a Local Project
 - i. Supports local service projects
 - ii. Does not require a partner club
 - iii. Should address the most pressing needs of the local community
 - iv. Whenever possible, should align with one of the seven areas of focus
 - v. Can provide \$1,000 to \$10,000, matching club funds
- b. District Grant for an International Project
 - i. Supports international service projects
 - ii. Does not require a partner club in the host country however, partnering with a Rotary/Rotaract club in the host country is recommended and encouraged
 - iii. Should address the most pressing needs of the community in the host country
 - iv. Whenever possible, should align with one of the seven areas of focus
 - v. Can provide \$1,000 to \$10,000, matching club funds

Clubs may apply for one grant for a local project and/or one grant for an international project. Clubs may recruit additional D5080 clubs to partner on the project. Only one grant will be awarded for any individual project.

Clubs must be “qualified” to receive a district grant.

Club Qualification

The following criteria must be met for a club to be qualified:

1. Club must establish a Project Committee consisting of three club members.
 - a. These members are identified in DACdb as the “Club Signatures.”
 - b. Project Committee members are members of the club submitting the grant application, not members of partner clubs.
 - c. A Rotary/Rotaract club member who serves as an officer or paid staff of a cooperating or beneficiary organization may not serve on the Project Committee.
2. Club appoints a Club Grant Steward.
3. At least two of the three club members on the Project Committee and the Club Grant Steward attend district grant training (in person or online) and pass the post-training quiz.
4. The club completes and submits the Club Qualification MOU with D5080 Addendum and implements the requirements therein.
5. The club and members of the Project Committee are in good standing.

- a. Club RI dues are paid.
- b. Club District dues are paid.
- c. Club is not delinquent on any reports for previous Foundation grants.
- d. There are no undisclosed conflicts of interest.

District Grant Timeline

- October 2024 – Grant Training at the Fall Foundation Training Assemblies in the US and Canada. (Oct 19 – Spokane Valley, and Oct 20 - Creston)
- January – Online grant training will be offered one time in a zoom meeting format and a video of the training will be posted to the district website. (zoom date TBD)
- December/January/February – Clubs start planning a project
- Feb/March/April – Clubs start working on their grant applications in DACdb. (Applications are in draft form until they are completed and submitted)
- April 15th – Deadline for submission of the online application. Club qualification achieved.
- Early May – District Grant Subcommittee Chair (DGSC) reviews grant applications in DACdb and contacts any clubs that need to provide additional information or documentation.
- Mid May – District Grant Subcommittee meets to review/discuss all club applications.
- Late May – DGSC notifies clubs of committee decisions (approval/denial/grant amount). District approval means the club’s project will be included in the D5080 Block Grant Spending Plan submitted to TRF.
- June – DGSC submits D5080 Block Grant Application and Spending Plan to TRF
- June/July – TRF reviews D5080 Block Grant Application and may request additional information.
- July/August – TRF notifies D5080 of block grant approval status. If approved, TRF provides a block grant funding timeline and clubs are notified that they may begin their projects.
- Upon receipt of block grant funds from TRF, grant checks/cheques will be mailed to clubs.

Selecting Grant Projects

The D5080 timeline for implementing a district grant project is approximately 9 months (Aug-Apr). Whenever possible, clubs should select projects that can be completed in that timeframe.

Please note: The D5080 Block Grant for 2024/2025 must be closed before the block grant for 2025/2026 can be approved. Clubs implementing district grant projects in 2024/2025 must complete their projects and submit their final reports by April 30th.

Final reports are due within 60 days of project completion, no later than April 30, 2025. If a club has not completed a project, an interim/progress report is due by April 30, 2025. An interim report must be approved by the DGSC, and the club must certify that all grant funds have been, or will be, spent.

Grant Funding

Funding for D5080 District Grants comes from District Designated Funds (DDF). The DDF match will be made on a 1:1 basis (matching D5080 club funds), not to exceed a maximum of \$10,000 for a local project or an international project. If grant requests exceed available DDF, the District Grants Subcommittee may award grants for lesser amounts. The Subcommittee also has the option to ask clubs applying for two grants to identify one project as their primary project for grant funding.

Club funds and grant funds are deposited to a designated club grant account. Project expenses are paid from that account. When paying for project expenses, club funds are spent first. Once club funds are spent, grant funds pay for the balance of project expenses. Any unspent grant funds must be returned to D5080.

Grant Applications

Grant applications are submitted in DACdb. In addition to completing the online application, the club's Project Committee will upload the club's signed Club Qualification MOU + D5080 Addendum, their Financial Management Plan, and pro forma invoices for any project expense of US\$1,000 or more.

Final Reports

Final reports, and interim/progress reports, are submitted in DACdb. Scanned (legible) copies of expense receipts must be uploaded, along with bank statements for the club's dedicated grant account. The DGSC will review all final reports and will match receipts to bank statements to verify project expenses.

Acceptable receipts include receipts from the vendor, invoices that are marked "paid" by the vendor, and/or copies of cancelled checks/cheques payable to the vendor.

Express Grants

Express grants are no longer offered in D5080.

Source of Grant Funds

District Designated Funds (DDF) are derived mostly from donations to The Rotary Foundation Annual Fund – SHARE by Rotarians and clubs in D5080.

To ensure the availability of grant funds in the future, clubs are encouraged to promote giving to The Rotary Foundation Annual Fund – SHARE.

Considerations for Grant Approval

The District Grants Subcommittee considers a variety of factors when reviewing grant applications. Those factors can include the alignment of the project with the TRF Mission, the number of beneficiaries to be served, active participation of Rotary/Rotaract members, the club's PR/PI plan to promote the project and report its impact, club/member giving, and other factors.

District Grant Subcommittee Chair (DGSC)

Karen Cook – email mkarencook26@gmail.com – phone 208-667-6300 (landline)

District Stewardship Chair

Peter Kalunian – email pkalunian@gmail.com – phone 206-854-0612

District Rotary Foundation Committee Chair (DRFCC)

Doreen Fox Kelsey – email dfoxkelsey@hotmail.com – phone 509-499-5223