

# EVERYTHING YOU NEED TO KNOW ABOUT DISTRICT GRANTS

D7600 Chesapeake PETS

March 6, 2020 Chantilly VA

Rudy Garcia, DRFC Grants Chair (19-20)

Shel Douglas, DRFC Grants Chair (20-21)

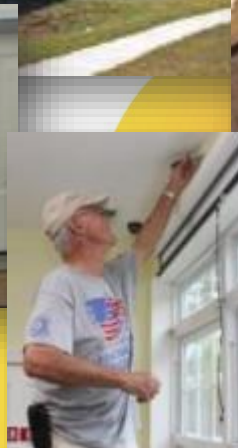
Kevin Yeargin, DRFC District Grants Chair (20-21)



# What is a District Grant?

Small scale, short-term activities that address needs in your communities and abroad within the six Areas of Focus.

The Rotary Clubs of Historic Triangle-  
Williamsburg and Yorktown



Hanover / Mechanicsville / Ashland Rotary Clubs  
Raise Coffee Co. Vocational Training Trailer

Natasha House Project 2019-

## Where Does the District Designated Funds (“DDF”) Come From?

1. The DDF comes from the money the District contributed to the Rotary Foundation (TRF) three years ago (2017-18)
2. 50% of the District’s contributions made three years ago are returned to District 7600 as DDF.
3. Up to 50% of the DDF can be allocated by District 7600 for District Grants.

# What it Looks Like for the 2020-2021 Rotary Year

1. During the 2017-18 Rotary Year, District 7600 contributed \$829,670 to TRF.
2. Consequently, District 7600 will have access to DDF in the amount of \$414,835
3. Therefore, District 7600 will be able to fund District Grants in the approximate amount of \$207,417.50 (an increase of \$53,980.23 from 2019-20).

# How Does our District get access to the DDF?

1. The District solicits applications from the Clubs.
2. The Clubs submit the applications for District Grants no later than May 15<sup>th</sup>.
3. The District Rotary Grants Committee approves all or part of the submitted grants.
4. The District creates a Spending Plan that must be approved by TRF.
5. Once approved by TRF, the District Grant funds are released to the District as a block.
6. District 7600 disperses the funds pursuant to the approved Spending Plan.

# What Each Club Must Do to Obtain a District Grant

- A. **Each** Club must execute a Memorandum of Understanding (“**MOU**”) **AND** upload the executed MOU(s) to DACdb
- B. The 2020-2021 Club President (current PE) must submit the club’s 2020-2021 **Foundation Goals** in Rotary Club Central by May 1, 2020.

# What Each Club Must Do to Obtain a District Grant Con't

- D. Have at least one club member attend a Grants Management Seminar (“**GMS**”)
- E. Develop a project based on an identified “**Community Need**”
- F. Use the **Grants Module in DACdb** to apply for the Grant.

# District Grants Dos and Don'ts

## A. Do plan a budget :

1. \$5,000 limit per club/10% match
2. \$25,000 for joint projects/5 club max
3. Use **Zero-based budgets** and be sure to include estimates/documentation of requested expenses

## B. Do target a project within the Rotary six areas of focus.

## C. Do document how the project is sustainable



## District Grants Dos and Don'ts (Cont.)

- D. Do not start the Project before TRF approves the District Spending Plan- generally around August 1<sup>st</sup>**
- E. Do complete final reports and maintain records for five (5) years**
- F. Publicity, publicity, publicity! Do have a plan.**
- G. No repeat projects!**

# District Grants Dos (Cont.)

## NEW FOR 2020-2021

### ***H. Do CONSIDER PARTNERING with a Rotaract Club or Interact Club***

- ▶ ***\$2500 limit per Rotaract Club (2)***
- ▶ ***\$1500 limit per Interact Club (unlimited)***
- ▶ ***\$25,000 DDF max per project***
- ▶ ***10% match required***
- ▶ ***All Clubs must be in good standing with RI; complete MOU; complete GSM***
- ▶ ***Lead RC completes Grant Module in DACdb***
- ▶ ***All Rotary Clubs have Foundation goals in by May 1<sup>st</sup>***

# Conflict of Interest Policy

- ▶ A conflict of interest occurs when someone is in a position to make or influence a decision about a grant or award that could benefit them, an immediate family member, a business partner, or an entity in which they, an immediate family member, or a business partner has a significant financial interest or in which any of them is a trustee, director, or officer.
- ▶ All actual or potential conflicts of interest need to be disclosed in your grant application. If you're not sure if there's a potential conflict, you should disclose it.

# The TOP 5 “TAKE-AWAYS”

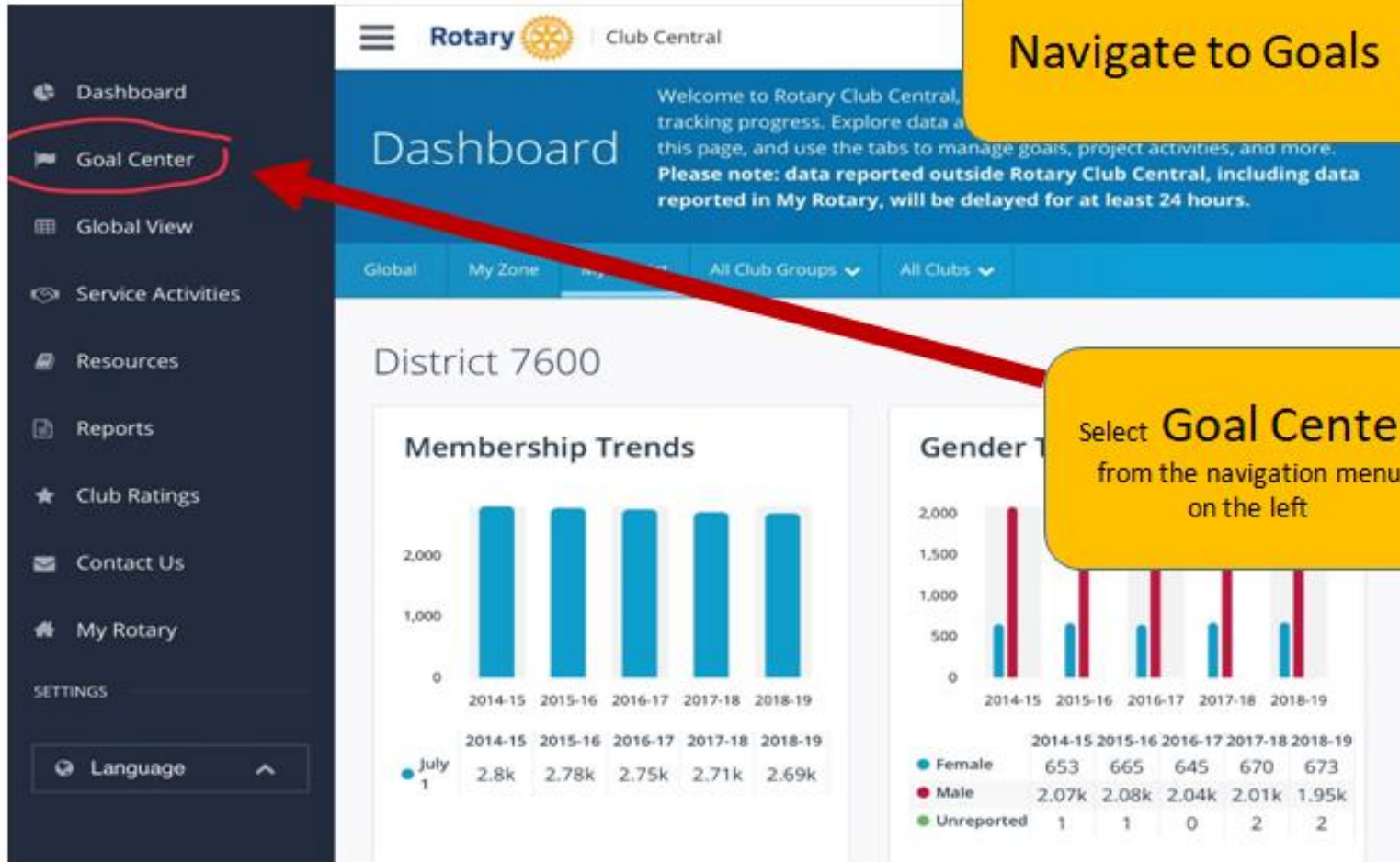
- ▶ **No “MOU” – No Deal!**
- ▶ **NO GMS-NO DEAL! PARTICIPATE IN AT LEAST ONE OF TWO GRANT MANAGEMENT SEMINARS (3/28 or E-Learning Module)**
- ▶ **GOALS NOT ENTERED BY MAY 1? NO DEAL!**
- ▶ **The application deadline is a hard deadline and it is in *70* days!!**
- ▶ **Pave the way for your successor by timely completing all reports for 2019-2020 grants – DUE MAY 1<sup>st</sup>**

**WAIT... WHAT??**  
**MY CLUB'S FOUNDATION**  
**GOALS MUST BE ENTERED**  
**BY MAY 1<sup>st</sup>**

**HOW DO WE DO THAT?**



Navigate to Goals



The screenshot shows the Rotary Club Central dashboard for District 7600. A red arrow points from a yellow callout box to the 'Goal Center' option in the left-hand navigation menu. The 'Goal Center' option is circled in red. A yellow starburst with the number '1' is positioned to the left of the navigation menu.

**Membership Trends**

	2014-15	2015-16	2016-17	2017-18	2018-19
July 1	2.8k	2.78k	2.75k	2.71k	2.69k

**Gender Trends**

	2014-15	2015-16	2016-17	2017-18	2018-19
Female	653	665	645	670	673
Male	2.07k	2.08k	2.04k	2.01k	1.95k
Unreported	1	1	0	2	2

Select **Goal Center** from the navigation menu on the left

1



The screenshot shows the 'Goal Center' page for a Rotary club. The left sidebar contains navigation options: Dashboard, Goal Center, Global View, Service Activities, Resources, Reports, Club Ratings, Contact Us, and My Rotary. The main content area shows the club name 'Rotary Club of', a year selector set to '2018-19', and a table of foundation goals. The table has columns for 'Members & Engagement', 'Rotary Foundation Giving', 'Service', 'Young Leaders', 'Public Image', 'Rotary Citation', and 'All'. Two rows are visible: 'Annual Fund contributions' and 'PolioPlus Fund contributions'. An 'EDIT' button is located above the table. Red circles and arrows highlight the club name dropdown, the year selector, and the 'EDIT' button. Yellow callout boxes provide instructions for each highlighted element.

**Find your club in the drop down list**

**Make sure the appropriate year is listed**

**Click edit to see the list of Foundation Goals**

Members & Engagement	Rotary Foundation Giving	Service	Young Leaders	Public Image	Rotary Citation	All
<b>Annual Fund contributions</b>				ACHIEVEMENT (USD)	OF	GOAL (USD)
<a href="#">Show goal details and history</a>				965		1,700
As Of 26-Feb-19						
<b>PolioPlus Fund contributions</b>				ACHIEVEMENT (USD)	OF	GOAL (USD)
<a href="#">Show goal details and history</a>				0		200
As Of 26-Feb-19						

# Foundation Goals on My Rotary- DUE by **MAY 1st**



May 1<sup>st</sup> is the due date for clubs participating in grants

3

Goal Name	Achievement (USD)	Goal (USD)
Annual Fund contributions	0	1,500
PolioPlus Fund contributions	0	2,000
Major gifts	0	0
Bequest Society members	0	1
Benefactors	0	1

Identify your club goals for all 5 Foundation Goals

Be sure to Save



# D7600 ROTARY FOUNDATION GRANTS TEAM 2020-2021

- ▶ **PDG Stephen Beer, DRFC CHAIR**
- ▶ **PDG Bill Pollard, DRFC Treasurer**
- ▶ **Stewardship/ Audit Chair- Don Vaught**
- ▶ **Grants Chair- Shel Douglas**
  - ▶ **District Grants Committee Chair- Kevin Yeargin**
    - ▶ **District Grants Committee: Lee Harris, Raghavan Sadagopan, & Sigur Whitaker**
  - ▶ **Global Grants Committee Chair- Shel Douglas**
    - ▶ **Global Grants Coordinators- Adeeb Hamzy, Paul Peter, & Ray Spencer**
  - ▶ **Rotary Peace Fellows- Mike Little**



# YOUR FOUNDATION TEAM IS HERE TO HELP

