6900 District Grants 2019-2020

- Jim Squire, District Governor
- PDG Cheryl Greenway, Foundation Chair
- Anne Glenn, Grants Chair
- Mary Ligon, District Grants

Essentials

- 2018-19 Grant Report submitted and accepted by March 31, 2019

- Eligible for up to $2000

- Additional $1000 for top 5 highest total dollar donating clubs in 2016/17

- May combine with clubs for single project

- One project per grant

- Competitive Grants – at least 1 for $10,000

- Grant request due May 15

- Decision on competitive grants by May 31

- Anticipated date for spending on project – Mid July
  - Wait for notification

- All spending completed by AND report submitted within 30 days of spending the money and no later than March 31, 2020

Highest Giving Clubs in 2016/17

- Alpharetta $78,744.59
- Vinings $45,481.70
- Roswell $40,728.00
- Columbus $35,785.60
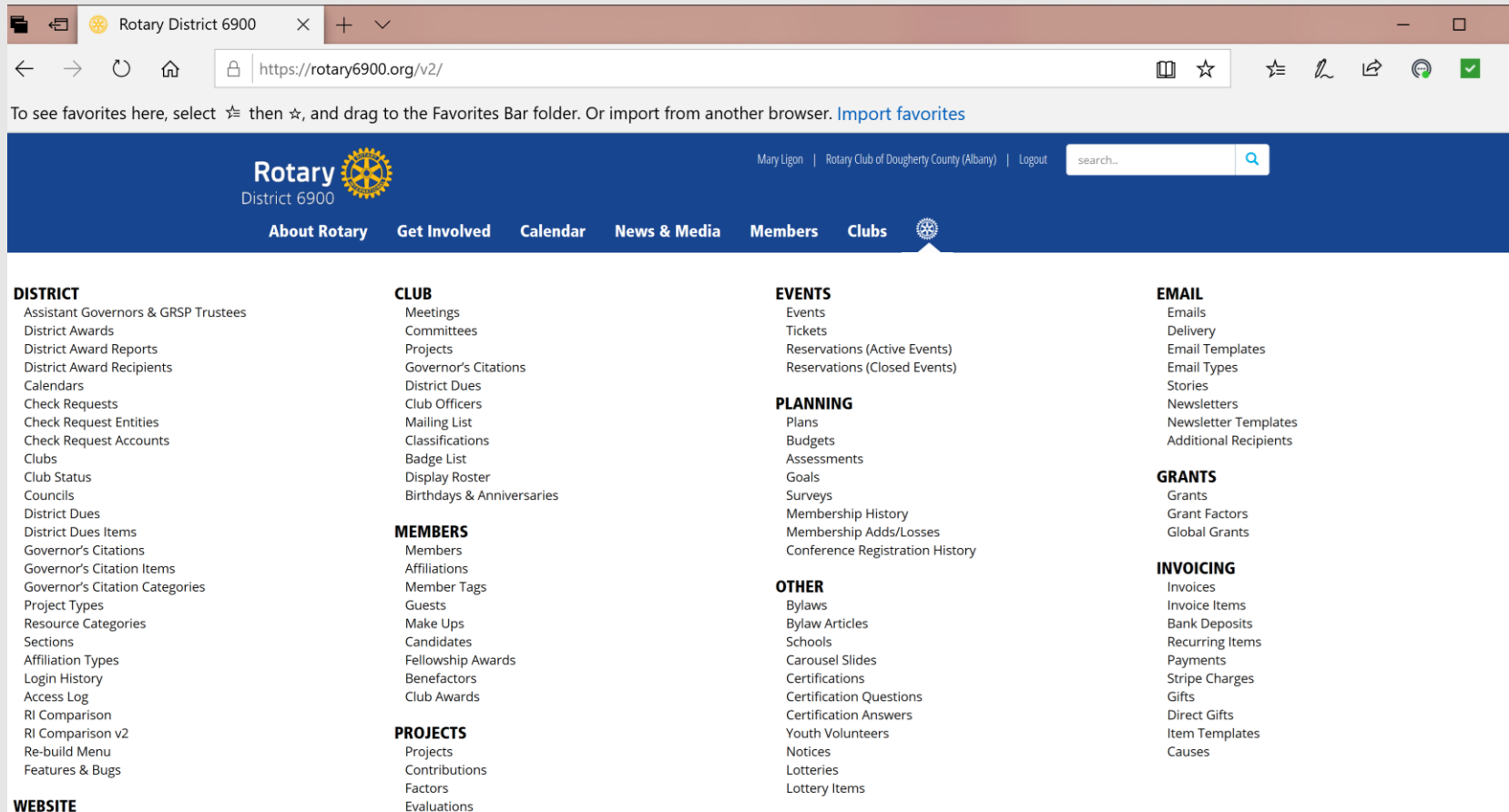- East Cobb $34,428.50

Use Rotary6900.org

- Request District Grant funds for project
- Quotes/Notes in Budget/Spending Plan indicate your preparation for project
- Grant management requirements included in application submission
- Resources - https://rotary6900.org/v2/page/29

Application Instructions Summary

- Hover on the Rotary Wheel to see super menu

- Select Grants

- Click the Create link to create the grant request.

- Fill out the form and save.

- To add team members, type their last name in the box and then choose from the pop up list. Be sure to add your club foundation chair and president to your team so they can approve the grant request.

- Rather than sending emails about the grant back and forth, use the Add comment button to add a comment. The team members will be notified that a comment has been added.

- Use Add comment for all correspondence with District Grants Chair.

- Once the foundation chair is satisfied, he/she can change the status to Foundation Chair Approved. The system will log that approval.

- Once the foundation chair has approved, the club president can login and change the status to Club President Approved. The system will log that approval.

- Change status to Submit

Application Instructions – Screen Prints

- Hover on the Rotary wheel to see super menu
- Select Grants

- Change the Rotary year to 2020
- Click the Create link to create the grant request.

- Fill out the form and save
- To add team members, type their last name in the box and then choose from the pop up list. Be sure to add your club foundation chair and president to your team so they can approve the grant request.
- Grant Summary is only a sentence or two.

CREATE GRANT REQUEST

1. Save your work as you go and use the Update link or pencil icon to make changes.
2. Use the Add Comment box rather than emails to correspond with District Grant Chair and team members on questions or comments about the grant.
3. Once the Foundation Chair is satisfied, he/she should change the status to Foundation Chair Approved. The system will log that approval.
4. Once the Foundation Chair has approved, the club President should login and change the status to Club President Approved. The system will log that approval.
5. Once both approvals are logged, change the status to Grant Request Submitted. The District Grants Chair will review and provide feedback in the comments box or accept it as complete to include in the district's block grant application to the Foundation. The team will be notified of all status changes.

Overview   **Details**   **Documentation**

PROJECT

Club *
Dougherty County (Albany)

Year *
2019/2020

Project
select..

Focus
select..

Co-Sponsoring Clubs
Albany
Alpharetta
Americus
Atlanta
Atlanta Airport
Atlanta Brasil
Atlanta West End
Bainbridge
Barnesville
Blakely
Bremen
Brookhaven
Buckhead
Cairo
Camilla

Team Members

Add Team Member
Type a few characters of the lastname, then select from dropdown list.

Type *
select..

Grant Manager
Ligon, Mary

Amount Requested *

Amount Approved

Start Date * ?
Select date ...

End Date * ?
Select date ...

History ?
select..

Grant Title *

Grant Summary * ?

If your grant has co-sponsors, control/command

select.. ▾	Ligon, Mary ▾			Atlanta

Atlanta
Atlanta Airport
Atlanta Brasil
Atlanta West End
Bainbridge
Barnesville
Blakely
Bremen
Brookhaven
Buckhead
Cairo
Camilla

Start Date * ?

Select date ...

End Date * ?

Select date ...

History ?

select.. ▾

Grant Title *

Grant Summary * ?

If your grant has co-sponsors, control/command click on the co-sponsoring clubs to include them.

Mailing Address ?

Word Count (limit 65): 0

Statistics

Measure	Projected	Actual
Beneficiaries ?		
Volunteer Hours ?		

Grant Status *

Draft ▾

Amount Refunded

Save

Details ⓘ

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The Problem

[Demonstrate the severity of the problem and the lack of other resources to address it.]

Impact

[Explain the project's impact on the beneficiaries ... how many will be impacted, how significantly and for how long?]

Volunteer Involvement

[Explain how Rotary volunteers will be involved in the project.]

Public Image Impact

[Explain how you will build community awareness of the problem and Rotary's role in addressing it.]

PROJECT REVENUES

Item	Amount	Notes
District Grant Funds		
TOTAL	$0.00	

PROJECT EXPENSES

Item	Amount	Justification
TOTAL	$0.00	

Overview   Details   **Documentation**

Spending Report Instructions

ID	File	Document Type	Document Date / Notes	Amount / Check #	
1		select.. / Project Document / Project Photo / Receipt / Check / Bank Statement	Select date ... Notes	Amount Check Number	Browse...
2		select..	Select date ... Notes	Amount Check Number	Browse...
3		select..	Select date ... Notes	Amount Check Number	Browse...

When attaching bank statements including check images, please note the check numbers in the notes. To attach more than three documents, attach the first three, save the grant and then update. You will be able to add three more each time you update.

When all spending documentation has been entered, you can easily review it under the Spending Documentation tab ... and be sure to change the status to Spending/Documentation Complete to submit your report and signal the district grant chair to review.

Save

- Once the Foundation chair is satisfied, he/she can change the status to Foundation Chair Approved. The system will log that approval.
- Once the Foundation chair has approved, the club president can login and change the status to Club President Approved. The system will log that approval.
- Change status to Submit Grant Request

Grant Status *

select..

Grant Status cannot be blank.

Save

Volunteer Hours

select..
Draft
Foundation Chair Approved
President Approved
Grant Request Submitted
District Accepted Request
Club Accepted
Foundation Approved
Disbursed
Spending Documentation Complete; Report Submitted
Reviewing
District Grants 1 Accepted Report
District Grants 2 Accepted Report
Audited
Declined

- Rather than sending emails about the grant back and forth, use the Add comment button to add a comment. The team members will be notified that a comment has been added.
- **Use Add Comment for all correspondence with District Grants Chair.**

Final Report

- Due 30 days after spending complete and no later than March 31, 2020

- Documentation for each expense:
  - Receipt or Invoice
  - Check
  - Bank statement showing check cleared

- Separate account recommended for ease with bank statements

- Check to nonprofit okay as long as your club has receipts and payments from them for items purchased with grant funds

- Making improvements – read instructions

Competitive Grant Evaluation

- **The Problem -** Demonstrate the severity of the problem and the lack of other resources to address it. Use quantitative and qualitative data.

- **Impact -** Explain the project's impact on the beneficiaries … how many will be impacted, how significantly and for how long?

- **Volunteer Involvement -** Explain how Rotary volunteers will be involved in the project. How many, number of hours, doing what.

- **Public Image Impact -** Explain how you will build community awareness of the problem and Rotary's role in addressing it.

Foundation funded district grant projects must:

- Have been reviewed and approved by TRF before project implementation/spending begins
- Not use funds to reimburse clubs for activities and expenses already completed or in progress before grant project approval by the Rotary Foundation.
- Planning for grant project activities prior to approval is encouraged, but expenses may not be incurred.
- **After grant project approval, any changes to the original project plan must be pre-approved by TRF.**
- Comply with *Rotary Foundation Terms and Conditions*
- Comply with *Conflict of Interest Policy for Grant Participants*
- Comply with *Use of Rotary Marks*
- Include appropriate signage or recognition of funding through the Rotary Foundation and club

Tips to Avoid Common Mistakes

- Be sure project expenditures can be done in timeframe (August – February) regardless of items out of your control – weather, dependence on other organization, etc.

- Spend all the grant money in accordance with approved project. Unspent and unapproved expenses must be returned to the district

- Parties, gifts are not allowed unless you can show humanitarian or educational purpose.

- Food and drinks used for event refreshments, hospitality should not exceed 10% of grant amount.

- GED and College scholarships – paid directly to the school in name of the student. May not be paid to the school's foundation. Final report must include name of student(s) and receipt(s).

- No gift cards unless distribution log and receipts provided to show actual goods and services purchased.

- Pay the vendor or supplier of goods and/or services directly from the club's bank account or with a club credit card is ideal. Reimbursement to individuals for project related expenses will be accepted with documentation of receipts and cancelled check as reimbursement.

- If in doubt, check with District Grant chair

- **Use the Comments box in the grant request at Rotary6900.org for all communication on the grant**

Requirements

- Relates to the mission of The Rotary Foundation and fits into one of the six areas of focus

- Includes the active participation of Rotarians

- Excludes any liability to The Rotary Foundation or Rotary International beyond the funding amount of the grant

- Adheres to the governing laws of the United States and the host area of the grant, and harms no individuals or entities

- Only funds activities that have been reviewed and approved before their implementation

Requirements

- Avoids any actual or perceived conflict of interest

- Excludes as beneficiaries any club employee, Rotarian, spouses, descendants, ancestors, or employees of partnering organizations

- Excludes as beneficiaries any former Rotarians, spouses, etc. who left Rotary less than 36 months ago

- Subjects any substantial purchases from a Rotary-connected vendor to an open bid process

Requirements

- Will not unfairly discriminate against any group
- Does not fund continuous support of any one beneficiary or entity
- Will not be used to establish a foundation or trust
- Will not be used to purchase land or buildings
- Will not be used for fundraising activities
- Will not be used to cover expenses for Rotary events such as district conferences, conventions, institutes, anniversary celebrations or entertainment

Requirements

- Will not be used for public image initiatives unless essential to project implementation
- Will not be used to purchase signage in excess of 10% of grant amount
- Will not be used for operating or admin expenses for another organization
- Will not be used for unrestricted cash donations to any beneficiary or entity

Coaching upon request and as available
mary@maryligonetc.com

Questions and Discussion