

# D5040 District Grants 2022-23

## Agenda

- **Qualify Your Club – for District & Global Grants**
- **District Grants and your Projects**
- **Applying for a District Grant**
- **District Grant Timelines**

Brian Finley  
District Grants Chair 2022-23  
Rotary District 5040  
Rotary Club of Squamish

# D5040 District Grants 2022-23

**FUNDING FOR:** short-term, small scale projects with a grant from C\$1,000 to C\$10,000.

**PURPOSE:** to address needs in your community and abroad.

**HOW TO APPLY:** after becoming qualified, clubs apply to the District on the Grants module on the District website.

## **HOW IT WORKS:**

- The District is allocated funds by the Rotary Foundation (District Designated Funds or DDF).
- When there are sufficient club applications, we send a list (spending plan) of the approved projects to the Rotary Foundation.
- We receive back a block grant which is used to fund the individual grants for approved club projects.

# D5040 District Grants

**Before you can apply for a Grant you must:**

- 1. Qualify your Club.**
- 2. Sign the Memorandum of Understanding – MOU.**
- 3. Plan your Project**
  - **scope**
  - **partners**
  - **budget**
  - **resources**
  - **timescale**



# D5040 District Grants



## QUALIFICATION REQUIREMENTS 2022-23



# Qualify Your Club – applies to Global & District Grants

- The qualification process helps ensure that your club understands the grant process, and the your stewardship & financial responsibilities.
- Qualification must be completed each year.
- To qualify:
  1. at least one member of your club must participate in **the District 5040 Grants Webinar**
  2. and at least one other member must take **the Grants Management Seminar** in the Learning Center on My Rotary
  3. Your President and President-Elect **must sign the MOU**




# Grants Management Seminar Re-certification

People who have completed the full 10-course seminar will now need to take just the Grant Management Recertification course each year.

To qualify, send me a copy of the course certificate.






New

Grant Management Recertification 2021-22

EN | 30m 00s ★ 5.0

E-Learning



Grant Management Seminar

ENROLLED

10 courses | 3h 10m

Learning Plan



# Memorandum of Understanding (MOU)

- signed by President & President-elect

**“The Memorandum of Understanding is an agreement between the club and the district and acknowledges that the club will undertake measures to ensure the proper stewardship and implementation of grant supported projects.”**

- **Have a proper financial management plan**
- **Maintain copies of all financial transactions**
- **Accurate and timely reporting**
- **Ensuring no conflict of interest**
- **Report potential or real mismanagement of grant funds**

**The Rotary Foundation or the District Grants committee may audit clubs or projects.**



# The District maintains an on-line record of qualified members and clubs

## Qualified Clubs

[« Previous Year](#) | **2021 - 22** | [Next Year »](#)

In order to be qualified to submit a grant application, a club must satisfy the following criteria:

- 1) Sign a Memorandum of Understanding for the year of the Grant Application
- 2) Have at least 2 trained members



Qualified	Club Name	Trained Members	MOU
	100 Mile House	0 <a href="#">View Members</a>	<input checked="" type="checkbox"/> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Bowen Island	3 <a href="#">View Members</a>	<input checked="" type="checkbox"/> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Burnaby	3 <a href="#">View Members</a>	<input checked="" type="checkbox"/> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Burnaby Deer Lake	4 <a href="#">View Members</a>	<input checked="" type="checkbox"/> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Burnaby Metrotown	2 <a href="#">View Members</a>	<input checked="" type="checkbox"/> <a href="#">Edit</a>
	Burns Lake	3 <a href="#">View Members</a>	<input type="checkbox"/> <a href="#">Edit</a>
	Dragon Club	1 <a href="#">View Members</a>	<input checked="" type="checkbox"/> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Gibsons	4 <a href="#">View Members</a>	<input checked="" type="checkbox"/> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Kitimat	5 <a href="#">View Members</a>	<input checked="" type="checkbox"/> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Ladner (Delta)	4 <a href="#">View Members</a>	<input checked="" type="checkbox"/> <a href="#">Edit</a>



# Member Qualification and On-Line Access

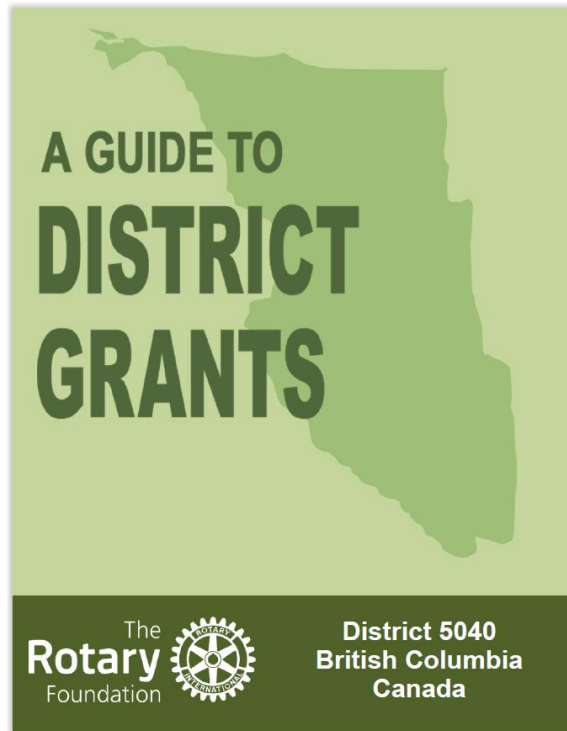
**Only qualified members have access to apply for or update grants on the system.**

**Members who take this session will have access rights valid until June 30<sup>th</sup> 2023.**

**Members who take the Grants Management Seminar or the Re-Certification course need to send a copy of their certificate of course completion to the District Grants Chair and will be valid until June 30<sup>th</sup> 2023.**

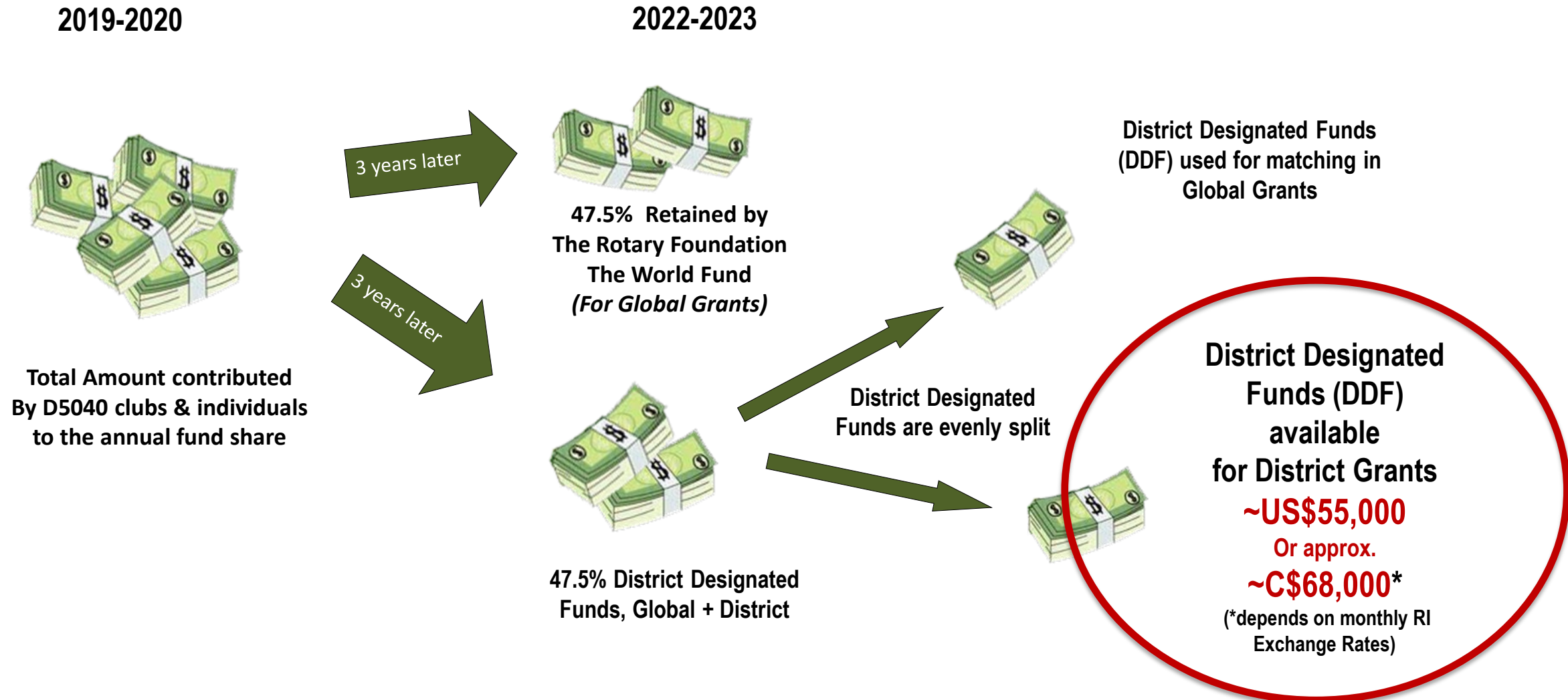


# ROTARY FOUNDATION GRANTS



**These two guides are both available on the District 5040 website. Reviewing these should be your first step in applying for a grant**

# District Grant Funds available for 2022-23 is ~ C\$68,000



# DISTRICT GRANTS – allocating the ~C\$68,000

- 1. Clubs submit District Grant applications via the Grants module on the D5040 website..**
- 2. When we reach 80% of the available funds we can submit a spending plan of the approved District Grant applications to the Rotary Foundation.**
- 3. We receive back single block grant to fund approved projects.**

**Administered by the District Foundation Committee with more flexible guidelines.**



# District Grant Award Statistics

Grant Year	Block Grant Total US \$\$	Grants Approved Total US \$\$	Number of Clubs Participating	Number of Grants	Avg Grant Award US \$\$
2012-2013	\$51,161	\$48,636	12/52	14	\$3,474
2013-2014	\$66,000	\$62,630	16/52	18	\$3,479
2014-2015	\$53,370	\$50,415	11/52	12	\$4,201
2015-2016	\$64,298	\$64,298	16/50	23	\$2,796
2016-2017	\$66,879	\$66,532	19/48	26	\$2,559
2017-2018	\$66,442	\$65,405	13/51	16	\$4,088
2018-2019	\$51,816	\$51,161	10/50	18	\$2,842.
2019-2020	\$80,262	\$80,262	17/50	26	\$3,087
2020-2021	\$76,139	\$76,139	22/49	34	\$1,884
2021-2022	\$62,079	\$62,079	14/49	19	\$4,379

# Congratulations to these 14 clubs who received a District Grant for the 2021/2022 Rotary Year:

Project Name	Sponsoring Club	Grant Amount CA\$
Beautiful Gate 2 - Peka	Bowen Island	\$10,000.00
Rotary Coats for Kids	Burnaby Metrotown	\$5,000.00
Gibsons Harbor Ocean Project	Gibsons	\$10,000.00
The Rotary Wing (in Kitimat Dementia Home)	Kitimat	\$5,200.00
Delta Peer Support Christmas Dinner	Ladner (Delta)	\$599.00
Bali Clean Water Project	Lionsgate (North Van)	\$6,500.00
Serendipity Child Development Society Equipment Purchase	Pender Harbour Madeira Pk	\$1,050.00
Read to Me	Powell River	\$2,228.00
Storywalk project	Richmond Sunrise	\$1,150.00

# Congratulations to these 14 clubs who received a District Grant for the 2021/2022 Rotary Year:

Project Name	Sponsoring Club	Grant Amount CA\$
Rotary Dog Park	Rotary Club of Terrace	\$10,000.00
Foundry Sea to Sky - Youth Hub	Squamish	\$10,000.00
Equipment for Project Amigo (Mexico)	Tsawwassen	\$678.00
Boys Who DARE (Drive to Action & Reach for Excellence) - Rotary Strathcona Youth Leadership Program	Vancouver Sunrise	\$8,000.00
Royal Canadian Marine Search and Rescue	West Vancouver Sunrise	\$1,500.00
Days for Girls	West Vancouver Sunrise	\$900.00
Squamish First Nation's Littlest Ones School Library - Books	West Vancouver Sunrise	\$1,000.00
West Vancouver - Seniors Christmas Lunch	West Vancouver Sunrise	\$500.00
West Van Police Department "Pulling Together Program"	West Vancouver Sunrise	\$666.67
Pulling Together	Tsawwassen	\$2,500.00

# DISTRICT GRANT PROJECTS



**Identify your project**

- Community Needs Assessment
- Brain Storm

**Plan your project**

- Budget
- Implementation
- Partners
- Impact

**Apply for a District Grant**

**If approved receive funding and begin project**

**Update project information during implementation including photos**

**Complete final report including impact and receive final funding**

**Celebrate**

**Rotary**





# SUCCESSFUL GRANT PROJECTS

- **Meet community needs**
- **Are sustainable**
- **Involve members and/or a partner**
- **Have an implementation plan**
- **Have a financial management plan**

# Recent Changes and Limits for District Grants

***The District will match \$1 of District Designated Funds to each \$1 of cash contributions*** for club sponsored Projects that:

- create a tangible asset that will have a lasting impact
- are sustainable
- are clearly identified as a Rotary project
- and involve active participation by Rotarians.

***The District will match \$.50 of District Designated Funds to each \$1 of cash contributions*** for club sponsored Projects that are seen as a contribution to another organization.

**Scholarships** will no longer be supported by district grants

For any single grant project

- The **maximum District Grant funding is \$10,000**
- The **minimum grant will be \$1,000.**

*Subject to the availability of funds*

# Successful Grant Funded Projects

More of This



Less of This



# Applying for a District Grant

- **Must be done online in the Grants module on the D5040 website.**
- **Only members who are qualified can apply for and manage District Grants.**
- **Clubs submitting more than one grant request must rank their requests.**
- **Projects should NOT start until your application is approved and funds are received from TRF.**
- **50% of grant funds released when the block grant is approved and received.**
- **50% released when the project is complete and the final report is done and accepted.**



# Club Authorization Form

- **Required for each Grant application/project**
- **Signed by Club President**
- **Identifies 3 people involved in the project**
- **Filed in Documents section of the Grant Application**



District Grant Club Authorization Form

Rotary Club:

Year:

Project Name:

We hereby authorize our club to apply for a district grant and agree to enter all project tracking information along with a final completion report on the [District 5040](#) website.

Club President:

Grant Applicant:

Please enter the names of at least three club members who are on the project committee:

1)

2)

3)

# Project Example

**Budget:** **\$20,000**

**Funding:**

- **Club funds** **\$10,000**
  - **District Grant** **\$ 5,000**
  - **3<sup>rd</sup> Party Donations** **\$ 5,000**
- \$20,000**



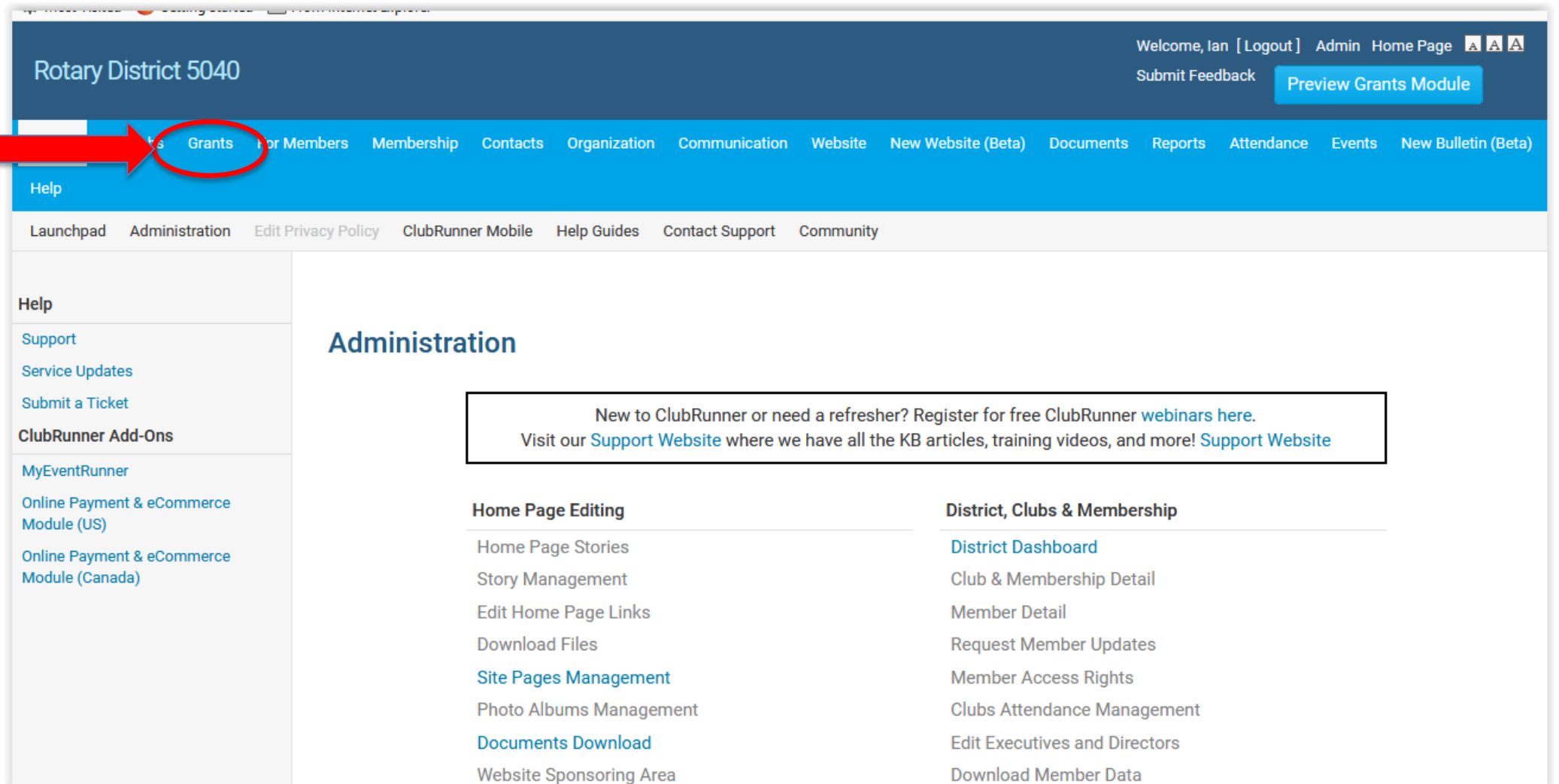
# Starting a District Grant

First, login to the 5040 website & go to Member Area

Your login is the same one you use for logging into your club's site



# Starting a District Grant



The screenshot shows the Rotary District 5040 ClubRunner interface. A red box on the left contains the text "Click on Grants" with a red arrow pointing to the "Grants" menu item in the top navigation bar. The "Grants" item is circled in red. The interface includes a top navigation bar with links for Home, Grants, For Members, Membership, Contacts, Organization, Communication, Website, New Website (Beta), Documents, Reports, Attendance, Events, and New Bulletin (Beta). A "Preview Grants Module" button is located in the top right corner. Below the navigation bar is a "Help" section with links for Launchpad, Administration, Edit Privacy Policy, ClubRunner Mobile, Help Guides, Contact Support, and Community. The main content area is titled "Administration" and contains a banner for new users to register for free ClubRunner webinars. Below the banner are two columns of links: "Home Page Editing" (Home Page Stories, Story Management, Edit Home Page Links, Download Files, Site Pages Management, Photo Albums Management, Documents Download, Website Sponsoring Area) and "District, Clubs & Membership" (District Dashboard, Club & Membership Detail, Member Detail, Request Member Updates, Member Access Rights, Clubs Attendance Management, Edit Executives and Directors, Download Member Data).

Rotary District 5040

Welcome, Ian [ Logout ] Admin Home Page [A](#) [A](#) [A](#)

Submit Feedback [Preview Grants Module](#)

[Home](#) [Grants](#) [For Members](#) [Membership](#) [Contacts](#) [Organization](#) [Communication](#) [Website](#) [New Website \(Beta\)](#) [Documents](#) [Reports](#) [Attendance](#) [Events](#) [New Bulletin \(Beta\)](#)

[Help](#)

[Launchpad](#) [Administration](#) [Edit Privacy Policy](#) [ClubRunner Mobile](#) [Help Guides](#) [Contact Support](#) [Community](#)

**Help**

[Support](#)

[Service Updates](#)

[Submit a Ticket](#)

**ClubRunner Add-Ons**

[MyEventRunner](#)

[Online Payment & eCommerce Module \(US\)](#)

[Online Payment & eCommerce Module \(Canada\)](#)

**Administration**

New to ClubRunner or need a refresher? Register for free ClubRunner [webinars here](#).  
Visit our [Support Website](#) where we have all the KB articles, training videos, and more! [Support Website](#)

**Home Page Editing**

- [Home Page Stories](#)
- [Story Management](#)
- [Edit Home Page Links](#)
- [Download Files](#)
- [Site Pages Management](#)
- [Photo Albums Management](#)
- [Documents Download](#)
- [Website Sponsoring Area](#)

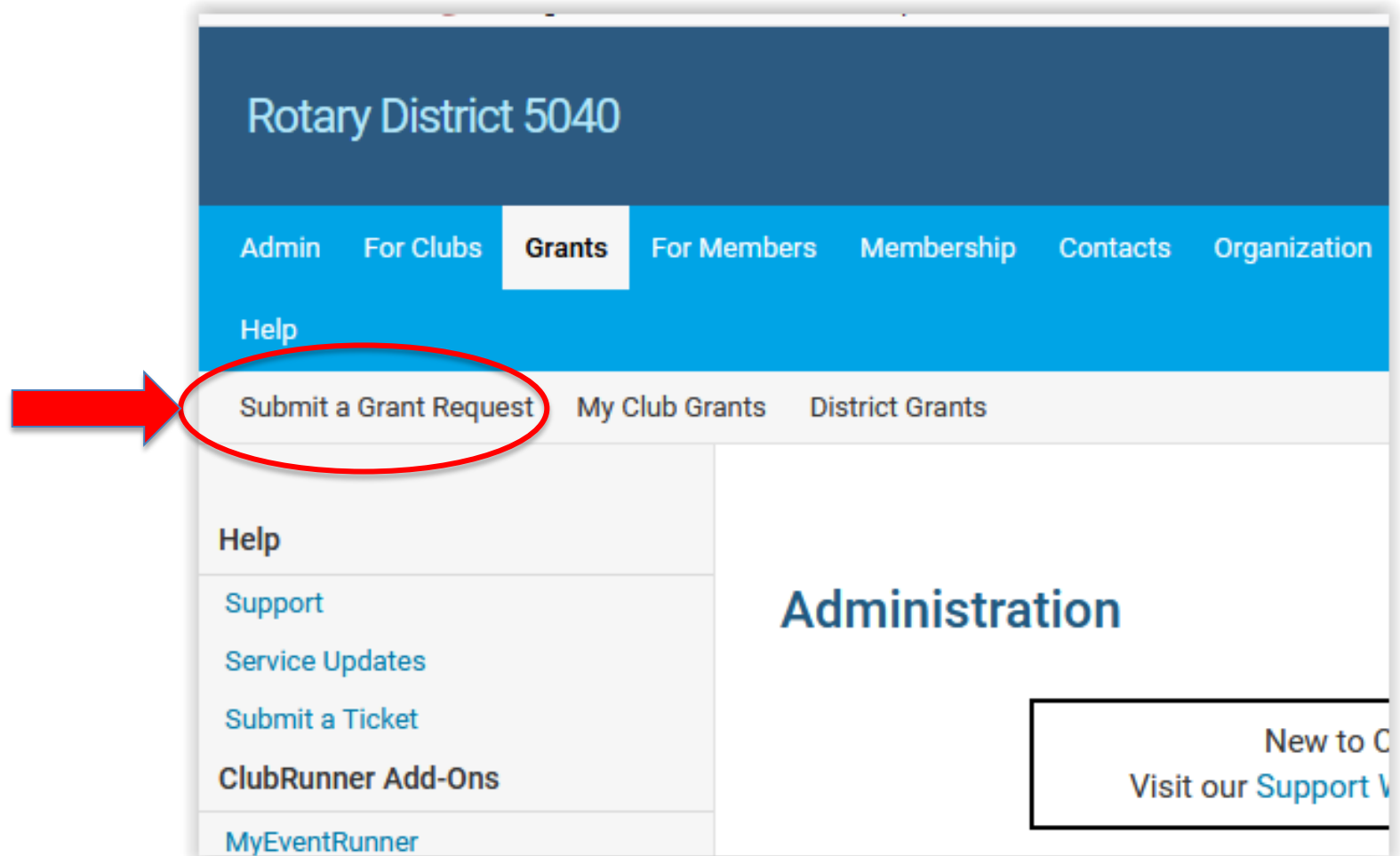
**District, Clubs & Membership**

- [District Dashboard](#)
- [Club & Membership Detail](#)
- [Member Detail](#)
- [Request Member Updates](#)
- [Member Access Rights](#)
- [Clubs Attendance Management](#)
- [Edit Executives and Directors](#)
- [Download Member Data](#)



# Step 1. Starting a District Grant

To start a district grant, click on submit a grant request, after you have started entering a grant you will be able to return to it by clicking on My Club Grants



# Step 1. Starting a District Grant

Your club must have a signed MOU and you have to have taken this session in order for the system to allow you to enter a grant

At this stage you enter

- Project name & description
- Location
- Budget

Grants

[View Club Grants](#)

[Submit a Grant Request](#)

Documents

[District Grant Documents](#)


Help

[Grants Module](#)




## Submit a Grant Request

Please enter the basic information relating to your Grant Request below.

If you are submitting a grant request on behalf of multiple clubs, you only need to submit this form once, and there must be one main sponsoring club. Enter the estimated budget requested at this stage; you will be able to refine this number later on in the application process once this initial request has been submitted and reviewed.

Note that you will need to be a certified member in order to submit a request. If you do not have the proper access, please contact the District Grants committee. 

### Project Details

Project Name:	<input type="text"/>
	Please select the year this project will be completed. Once selected, the year cannot be changed.
Project Year:	<div>-- Select Year - </div>
Country	<div>Canada </div>
Province/Territory	<div>British Columbia </div>
Postal Code	<input type="text" value="V3L 3A5"/>
City:	<input type="text" value="New Westminster"/>

# Step 2. Entering Information for a District Grant

If your initial grant request meets overall guidelines you will receive a request for more information message.


The screenshot shows the Rotary District 5040 website. The top navigation bar includes links for Admin, For Clubs, Grants (highlighted), For Members, Membership, Contacts, Organization, Communication, Website, New Website (Beta), Documents, Reports, Attendance, and Events. Below this, a sub-navigation bar shows Submit a Grant Request, My Club Grants (circled in red), and District Grants. The left sidebar contains links for Grants, View Club Grants, Submit a Grant Request, Documents, District Grant Documents, Help, and Grants Module. The main content area is titled 'Grant Request Applications' and features a filter by status dropdown set to 'Any Status'. Below the filter is a search bar labeled 'Filter records:'. A table displays one record with the following details:

Submitted	Project Name	Sponsoring Club	Estimated Budget
Jul 28, 2021	Foundry Sea to Sky - Youth Hub	Squamish	\$30,000.00

At the bottom of the table, it says 'Showing 1 to 1 of 1 records'. A red arrow points from the 'Grants Module' link in the sidebar to the table.


# Step 2. Entering Information for a District Grant

Opening your grant will give you this page where you fill in the project details. The tabs allow you to enter the budget, store documents and do a final report of how the project went.

Click on any of the tabs below to access and update the various sections of this Grant application. 

Details   Application   Budget   Documents   Project Overview   Individual Project Report   **Activity Log**

▼ General Description

Describe the project and the problem or need it will address, including the intended beneficiaries and how the project will benefit the community in need. Provide the estimated length of time needed to complete the project. 

Edit

► Community Assessment & Impact

► Sustainability

► Cooperating Organizations


► Implementation Plan

The activity log shows the status of the grant and contains messages from the grants committee

# Entering the Project Budget


Enter each expense item


Enter all sources of income, club generated funds, partner funding. This is also where you enter your grant request amount

Click on any of the tabs below to access and update the various sections of this Grant application. 

Details Application **Budget** Documents Project Overview Individual Project Report Activity Log


**Expected Expenses**


List all anticipated expenses for this project, including those that will be funded outside of the District grant portion. 

 Add A Budget Item

Description	Supplier	Local Amount	Currency	Tax	Total	Amount	Actions
This club has no Expected Expenses.							

**Expected Income**

List all anticipated income for this project, including funds that will be contributed by the club, other partners and the District grant portion. 

 Add Project Financing

Description	Funding Source	Amount	%	Actions
-------------	----------------	--------	---	---------

Clicking on the budget tab brings up this page


# Use Canadian Dollars for all items entered

The system default is \$US.  
Enter and track all funds in  
Canadian dollars.

## Add Budget Item

### Budget Item Details



Date: Apr 22, 2022 

Description: Roofing Material \*

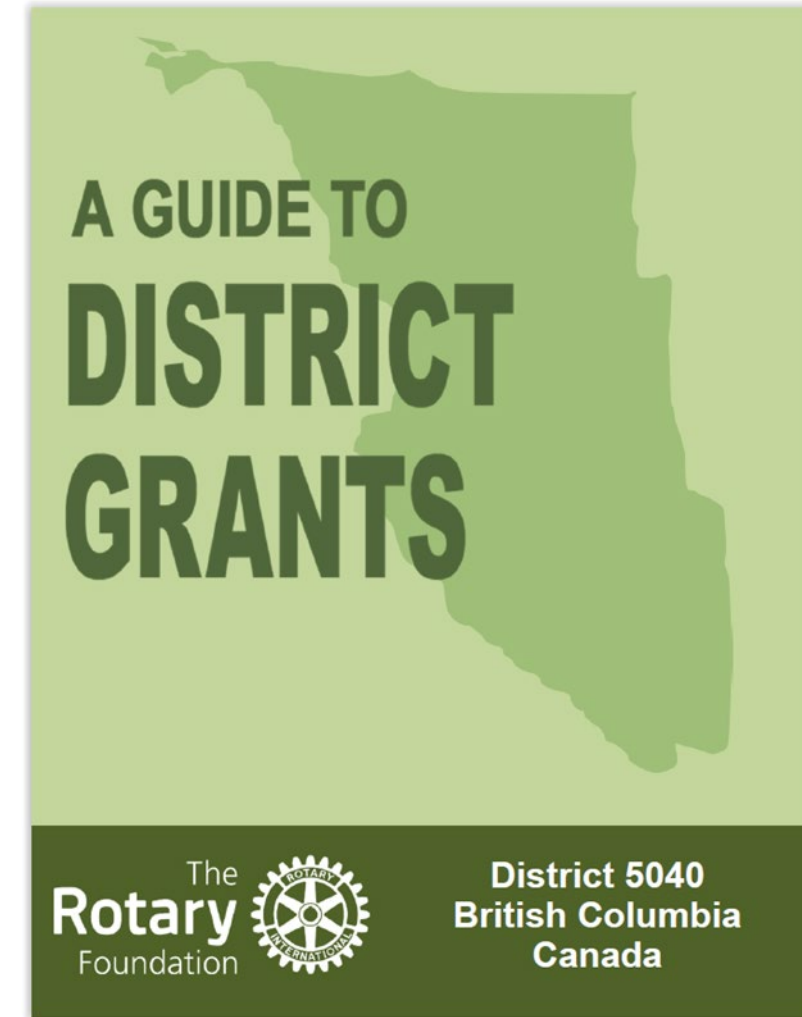
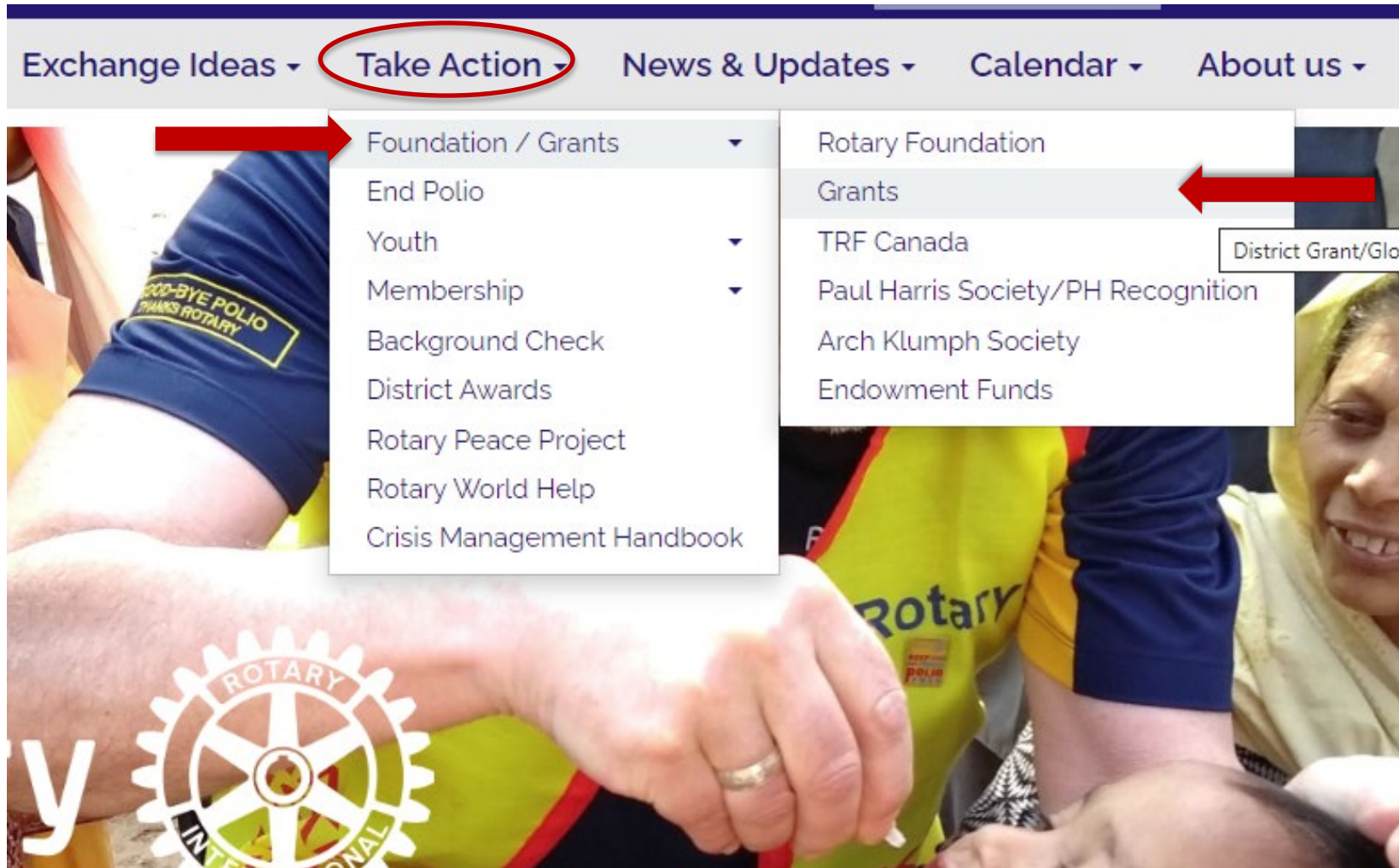
Supplier: RONA

Local Amount: 2,500.00 Canadian Dollar (CAD) ▼

Local Tax: 0.00 (CAD)

Exchanged Amount: 2,500.00

# Finding Information on Grants





# Video Training Module

**There is a very useful training video on how to use the ClubRunner District Grants Module**

It is on the District 5040 site under District Grants, How to enter a District Grant, you can also find it through the Guide to District Grants





# District GRANTS Committee Review

District Grants **CANNOT** be used to fund:

1. Continuous or excessive support of any one beneficiary, entity, or community
2. The establishment of a foundation, permanent trust, or long-term interest-bearing account.
3. The purchase of land or buildings
4. Fundraising activities
5. Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities
6. Public relations initiatives, unless they are essential to carrying out the project
7. Project signs that cost more than \$1,000
8. The operating, administrative, or indirect program expenses of another organization
9. Rotary Youth Exchange, RYLA
10. Scholarships

# District GRANTS Committee Review

District grant requests will be processed in the order they are received.

Early submission does not guarantee receiving a grant.

The committee considers the following criteria:

- Does the project meet all District Grant Guidelines?
- Has the club contributed to the annual fund in the past three years?
- Multiple grant applications must be ranked.
- Does the club have any outstanding projects (no final report)?
- The impact and sustainability of the project.
- Has the club received a grant in the past year?



# District 5040 Grants Timeline

<b>March 2022</b>	<b>PE's start planning projects</b>
<b>April 2022</b>	<b>District Grants Training</b>
<b>April 23, 2022</b>	<b>Applications Open</b>
<b>By end of May 2022</b>	<b>Signed MOU's submitted</b>
<b>June 30<sup>th</sup> 2022</b> ★	<b>Applications Close subject to having reached 80% of the funds available.</b>
<b>July 2022</b>	<b>The proposed spending plan based on approved grants is submitted to TRF</b>
<b>July-August 2022</b>	<b>Receive TRF approval for spending plan followed shortly thereafter by funds received by District</b>
<b>July-August 2022</b>	<b>District distributes 50% of funds to clubs (Clubs may apply for hardship consideration)</b>
<b>Sept 2022-June 2023</b>	<b>Clubs enter final report information on-line and receive final funds</b>



# Questions



# Thank you!

Now here's Bill

