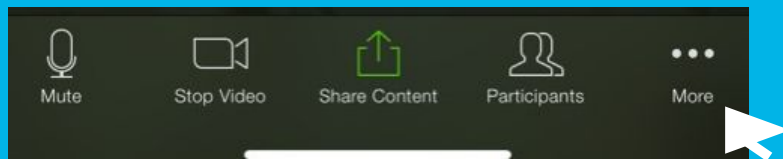


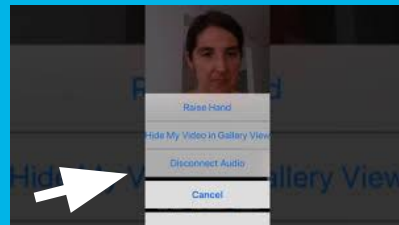
RULES OF THE ZOOM



Desktop Control View

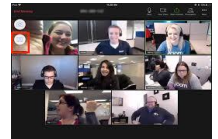
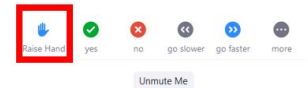


Tablet/Smartphone View



Participants

- Please activate your video webcam
- Please remain **muted** until called upon
- If using a phone for audio **please self mute** and unmute when called upon.
- Utilize “chat” function
- Utilize “raise hand” function
- **If the meeting is interrupted and ends, please wait 5 min and log in again**
- Gallery view will show all attendees
- Speaker view will show current speaker and is view available on an iPad or tablet
- This event is being recorded.



GRANT MANAGEMENT SEMINAR

DISTRICT 6580

WELCOME



Rotary

17 District Grants Awarded for 24-25

- Batesville** Support of school year backpack program for Tots and Teens
- Bloomington** Provided a bike rack at My Sisters Closet to prevent theft of bikes for those seeking services.
- Bloomington North** Provided nutrient food to support nutrition for prenatal and postpartum families.
- Bloomington Sunrise** Packaging of food for Backpack Buddies to assist families with food insecurity.
- Brazil** Purchased and installed sixteen charcoal grills for use throughout Forest Park.
- Center Grove** Assembly of mental health kits for the schools for students experiencing trauma.

17 District Grants Awarded Cont'd.

Clark County Provided supplies for YouthLink for tutoring students in need as identified by teachers and parents.

Columbus Replaced aging cash registers and provide job training skills for individuals that are unemployed.

Dubois County Provided training and certifications to the Latino community to help remove barriers of access to community life.

Franklin Funded equipment and instructor for a dance program for people with Downs Syndrome.

Greensburg Provided hunger relief through food boxes to families with food insecurity.

17 District Grants Awarded Cont'd.

Greenwood Purchased swim equipment to help with Special Olympics swim team.

Martinsville Provided, installed, and landscaped a play ground set for shelter for abused women and children.

New Albany Provided office space for Downs Syndrome of Louisville to meet program needs of families.

Salem Installed brick sidewalk at the historic village next to the John Hay Museum.

17 District Grants Awarded Cont'd.

Terre Haute Provided insulated bags to those receiving food from Catholic Charities to help with safe transportation to home.

Terre Haute South Assisted with crisis intervention training with community organizations and families of individuals with mental health issues.

Welcome

M



oderator
District Foundation Chair
PDG Jessika Hane



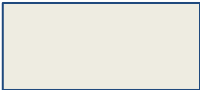
2025-2026

Welcome

Annua



l Fund Chair
PDG Peggy Peter



Welcome

D



District Grants Chair
PDG Bettye Dunham

PURPOSE

- Impact of The Rotary Foundation
- Understanding The Rotary Foundation
- Understand how to manage District grants
- Learn stewardship expectations
- Prepare clubs to implement the MOU
- Qualify clubs to receive grant funds
- Understand why grant funds are available

AGENDA

- Introduction and Impact of The Rotary Foundation – Jessika Hane
- Designing a Grant Project—Peggy Peter
- Applying for and Implementing a Grant – Bettye Dunham
- Oversight and Reporting—Jessika Hane

INTRODUCTION



SUPPORTING THE ROTARY FOUNDATION



PolioPlus Fund
End Polio Now

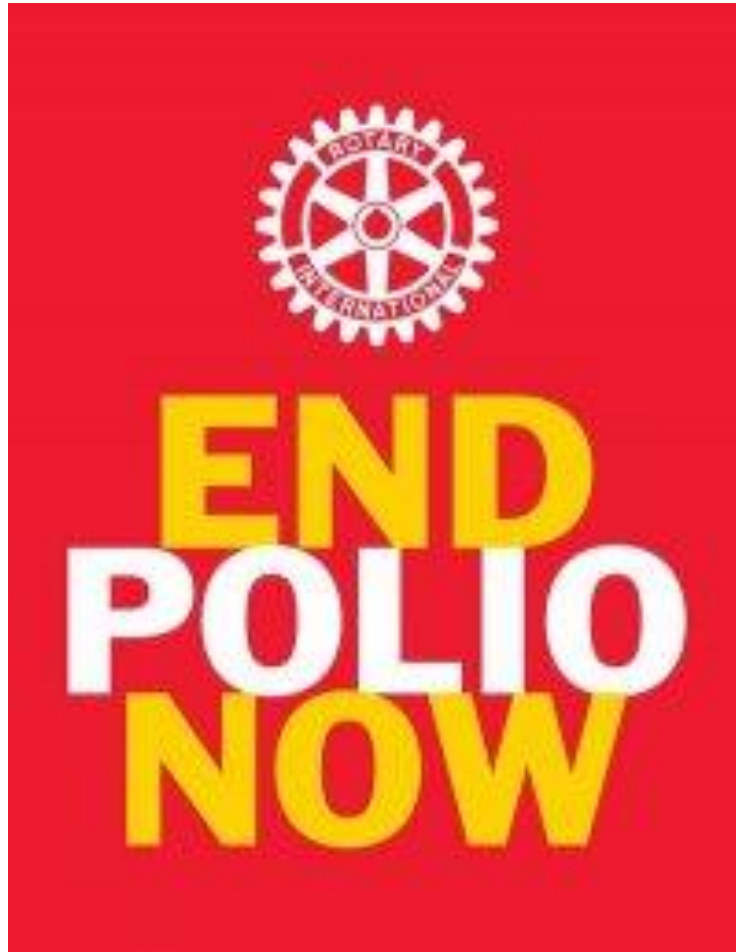


Annual Fund
For Support Today



Endowment Fund
To Secure Tomorrow

POLIO ERADICATION



- TO DATE ROTARY'S ACCOMPLISHMENTS
- 3 Billion children have been vaccinated in 40 countries
- 19 Million children were not stricken with polio
- 1.5 Million children did not die from polio
- All countries except Pakistan & Afghanistan are “Polio Free”

ANNUAL FUND

- Primary funding source for Foundation grants and activities
- Supports local and international grants through the SHARE system
- Contributions are credited to donor's club and applied to club's goal



ENDOWMENT FUND

- Contributions are professionally invested
- Only the earnings are spent



HOW WE FUND PROGRAMS – SHARE SYSTEM



47.5%
District Designated Fund (DDF)



47.5%
World Fund

DISTRICT 6580 GIVING 2023-24



- **ANNUAL FUND GIVING – \$176,987**
- **PER CAPITA GIVING – \$121.89**
- **YTD-\$95,814**

DISTRICT GRANTS 2025-2026

DISTRICT
DESIGNATED FUNDS

DISTRICT GRANTS
\$44,355



Session Polling Question #1

Have you ever given to The Rotary Foundation?

- Once
- Several Times
- Regularly (Monthly, Annually)
- With My Club Dues
- Never

SESSION 1

DESIGNING A PROJECT



Peggy Peter



LEARNING OBJECTIVES

- Identify best practices for designing a project
- Develop a plan to implement your project

SUCCESSFUL DISTRICT GRANT PROJECTS

- Meet community needs
- Have an implementation plan
- Maintain proper stewardship of funds



Note: Funded district grants from the past can be found on the District website.

NEEDS ASSESSMENT

- Base projects on communities' needs
- Determine availability of club and partner resources
- Talk to the community



PROJECT PLANNING

- Form a three-person grant committee
- Assign roles
- Make an implementation plan
- Establish a budget
- Have a contingency plan
- Have a document retention plan
- Inform your club of project application

CREATING A BUDGET

- Realistic and Comprehensive
- Reasonable prices with competitive bidding
- Clubs keep records of submitted bids
- Disclose conflicts of interest



JUDGING CRITERIA

- Project is meaningful to the community and benefits many
- Rotarian involvement (family of Rotary and Community/ies)
- Public Relations Plan for the project
- Application preparedness
- Level of club giving to TRF over the previous 3 years (2021-2024)
- Additional points *may* be given for uniqueness or innovative approach



Rotary

Session Polling Question #2

Does a Club's level of giving to the SHARE program of the Rotary Foundation's Annual Fund play any part in deciding which clubs receive a grant?

- Yes
- No

Session Polling Question #3

District Grants can be used for all of the following *except* for-

- Scholarships
- Polio Vaccines
- RYLA
- Youth Exchange

SESSION 2

APPLYING FOR AND IMPLEMENTING A GRANT

Bettye Dunham



LEARNING OBJECTIVES

- Write a successful grant application
- Understand grant financing

APPLYING FOR DISTRICT GRANTS

- Email application to Bettye Dunham by May 1st
- Applications become part of the spending plan submitted to RI from our District
- Grants are approved by RI as a package
- Clubs must plan for District Grants
- Common reporting date

APPLICATION & FORMS

- Application for grants funded during the 2025-2026 Rotary year **must be received by May 1, 2025 and must be in Word document format.**
- Applications reviewed by the District Grants Committee and the staff of The Rotary Foundation.
- If approved, the clubs will receive a check for the amount of the grant (around August 1st).

APPLICATION

Items that must accompany the application:

- Signed copy of the Club Memorandum of Understanding (MOU)
- Completed & signed copy of Grants Management Compliance Questionnaire
- Completed Transferring Custody of a Bank Account Form
- Forms available at www.rotarydistrict6580.org under Foundation and then District Grants 25-26 .



APPLICATION: DISTRICT GRANT RULES

District grants: dollar-for-dollar matching grant on the following basis:

- **Not less than \$250 and no more than \$3,000**
- Funds used for local community service and international projects
- Projects completed within the Rotary year granted



APPLICATION: DISTRICT GRANT RULES

- Submit a Final Report within 30 days of the completion of the project
- **Deadline: March 31, 2026**
- If the project is not completed by March 31st submit an **interim report by March 31st on the District Grant Report** covering the following:
 - all activity to date
 - detailing any delays
 - assurance of the completion of the project before August 31st



APPLICATION: DISTRICT GRANT RULES

The use of District Grant funds must:

- A. Promote participation of Rotarians in the implementation of the project
- B. Not involve the establishment of a permanent foundation, trust, or permanent interest-bearing account
- C. Not directly benefit a Rotarian; an employee of a club district or other Rotary entity, or others connect to Rotary through any family connection
- D. Not to be used to reimburse clubs/districts for projects already undertaken and in progress, or completed
- E. Not be used to fundraise for match or to pay for staff



APPLICATION: ELIGIBILITY CHECKLIST

1. Have your President & President-elect signed and included a Memorandum of Understanding (MOU) ? ___No ___ Yes
2. Have you included the Grants Management Compliance questionnaire? ___No ___ Yes
3. Have you completed the Transferring Custody of a Bank Account Form AND the copy of the Grants Bank Statement showing the club's portion of the funds on deposit? (Not required for grant awards of \$1000 or less.) ___No ___ Yes
4. Did two members of your club participate in the webinar on grants management seminar this year? Names:
_____,
_____ ___No ___ Yes



Rotary

APPLICATION: ELIGIBILITY CHECKLIST

5. Have you recorded an Annual Fund giving goal for your club on Rotary Club Central on the RI website? www.rotary.org ___No ___ Yes
6. Have you notified the Governor-elect of the name of your Club Foundation Chair? ___No ___ Yes
7. Have you paid all your District & RI dues that are currently due and payable? ___No ___ Yes
8. Have you received any Global or Community Grants for which you have not filed final reports? ___Yes ___No
 - a. If yes, is your club current with all interim reporting requirements? ___No ___ Yes
9. Is the project new to your club? ___No ___ Yes

APPLICATION: ELIGIBILITY CHECKLIST

10. Will your club be matching the amount requested? ___No ___ Yes
11. Is the project free of any conflict of interest or the appearance of such?
(See page 2 Rules and Regulations.) ___No ___ Yes
12. Would your club still complete the grant if they do not get the full
amount? ___No ___ Yes
13. And finally, have you signed this application? ___No ___ Yes
14. Are you current with your federal and state tax filing? ___No ___ Yes

If any of your responses are NOT in the RIGHT HAND COLUMN, please stop and contact the District Grants Committee.



APPLICATION

This form must be completed by filling in the fields using MSWord.
Fields expand as needed.

Rotary club
of: _____

Project Name: _____

Start Date: _____

Estimated Completion Date: _____

Name of Primary Club _____

Contact: _____

E-mail _____

Telephone _____

Name of Second Club _____

Contact: _____

E-mail _____

Telephone _____

Name of Third Club Contact: _____

E-mail _____

Telephone _____

CLUB MAILING ADDRESS

to mail Payment:

Rotary Club Name _____ Attention to: _____

Street Address _____

City, State, Zip _____



Rotary

APPLICATION

1. Briefly describe the project, its location, and its goals and activities and how it will be sustained.
2. Describe how the project will benefit the community and/or improve the lives of the less fortunate, who will benefit by the completion of the project, and **how many people in the community will benefit.**
3. Describe the **nonfinancial participation by Rotarians** in the project (i.e., How many Rotarians will be involved and how they will be involved).
4. How will the general public know this is a Rotary-sponsored project; i.e. how will it be promoted and publicized? Please provide details, e.g., publicity in a newspaper or display of the Rotary wheel.



APPLICATION

5. Cooperating Organizations – **If the project involves a cooperating organization**, please provide the name of the organization below and attach a **letter of participation** from that organization that specifically states its responsibilities and how Rotarians will interact with the organization in the project. By signing this application, the Rotarian sponsors endorse the organization as reputable, responsible, registered with the project community, and acting within the laws of the United States.

Name(s) of Cooperating Organization(s) and Contact Person



APPLICATION

6. Identify the primary area of focus aligned with RI:

Peace and Conflict Resolution _____

Water and Sanitation _____

Basic Education and Literacy _____

Disease Prevention and Treatment _____

Maternal and Child Health _____

Economic and Community Development _____

Environmental _____

Other (explain) _____

7. Project Duration: Projected Project start date: _____

Projected end date: _____



APPLICATION

9. Enter Budget Information: Income Sources

Sources of Income	Amount
Amount of District Grant Funds Requested: (Funds must be matched by the club. Show these matching funds as income)	
Club matching funds:	
Other Funding Sources (please specify): <i>(If total project is larger than the Rotary Club and District funds please include the total funds involved in the project if known.)</i>	
Total Budgeted Income:	



APPLICATION

PROJECT EXPENSES: REQUIRED (please attach an additional sheet if you need more space):

Expense Items (please be specific)	Cost
(NOTE: Best practices is for vendors to be paid directly by the club.) Detail what club funds AND matching funds will be spent on. Be as specific as possible.	
Total Budgeted Expenses:	



APPLICATION

10. As President and President-elect of the Rotary Club named above, we hereby affirm that **the club's board has voted** to undertake this project as an activity of the club and that the club's officers and directors have read, understand and agree to abide by the Club Memorandum of Understanding. In consideration of receipt of these grant monies, **we agree to implement the project as described in this application** and to complete this project in a timely manner and to submit a final report within 30 days of completion. **Failure to complete the project or to file timely final report will disqualify this club from future district or global grants.** We also affirm that all information in this District Grant Application is true and accurate, to the best of our knowledge.



APPLICATION

*Signatures are not required if submitted via e-mail with both parties listed in the address line.

Club President	
Name	
Signature or e-mail address*	
Date	

Club President-Elect	
Name	
Signature or e-mail address*	
Date	

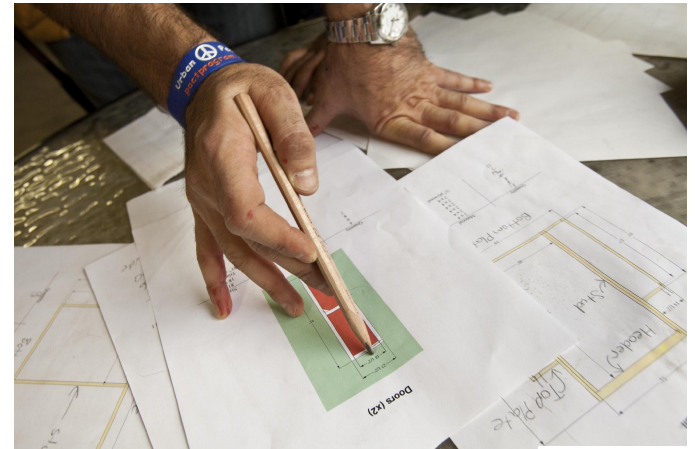
Send completed application and other required forms to: Bettye Dunham:
bdunham@rauchinc.org



Rotary

CONFLICT OF INTEREST

- Exists when a Rotarian benefits financially or personally from a grant
- Benefit can be direct to a Rotarian or indirect to an associate of the Rotarian



IMPLEMENTATION

- Communication
- Financial management plan
- Record keeping



Session Polling Question #4

The following must be included with the application *except*:

- Grant Application
- MOU
- Grants Management Compliance Questionnaire
- Listing of Previous Grant History
- Transferring Custody of Bank Account Form

Session Polling Question #5

All of the following are true about grants
except:

- Must be at least \$250 but no more than \$3000
- Grant Funds are matched at 2:1
- Grants are due by May 1st
- Clubs cannot change the use of the grant funds without approval from the District

Session Polling Question #6

Do you need to contact the grants committee if the scope of your project changes in any way?

- Yes
- No

SESSION 3

OVERSIGHT AND REPORTING

Jessika Hane



Rotary

LEARNING OBJECTIVES

- Identify best practices for managing funds and record keeping
- Identify which documents need to be retained
- Understand reporting requirements

STEWARDSHIP

Stewardship is the responsible management and oversight of grant funds, including:

- Report any irregularities
- Rotarian supervision
- Financial records review
- Oversee funds
- Submit reports on time

FINANCIAL MANAGEMENT PLAN

- Distributing funds
- Use checks or bank cards to track funds
- Detailed ledger
- Pay vendors directly
- Be aware of any local laws (i.e. zoning, etc.)



DOCUMENT RETENTION

- Retain for a minimum of five years
- Make copies



REPORTING REQUIREMENTS

Reporting:

- Verifies grants were managed properly
- Provides valuable data for your club, partners, and Rotary



DISTRICT GRANT REPORTS

- Submit final or interim reports by **March 31**
- Copy all receipts
- Pictures of the project
- Email to Bettye Dunham
bdunham@rauchinc.org



Session Polling Question #7

All of the following are true about reporting *except*:

- Final report is due on March 31st
- Documents retained for 5 years
- Copy of all receipts/checks should be submitted at time of final report
- If the grant project is not completed by March 31, then no paperwork is due until August 31
- If the grant isn't completed as described, funds must be returned to the District Foundation team

KEY WEBSITES

- <http://www.rotarydistrict6580.org>
 - Contains grant application and other forms, webinar PowerPoint, and other district grant documents
- <http://www.rotary.org>
 - *Look under the Foundation Tab
 - *Go to the District Grants Tab
- *Terms and Conditions of District Grants & Global Grants
- [You can Google anything you need](#)

KEY CONTACTS

- Bettye Dunham—District Grants Chair: 502-609-1923
bdunham@rauchinc.org
- Peggy Peter—Annual Fund Chair: 502-552-0342
prespeggy@aol.com
- Jessika Hane—District Foundation Chair: 812-345-2256
Jessika@Hane.com
- Bob Browning—Global Grants Chair: 317-213-1119
bbrowningcpa@gmail.com

QUESTIONS



