

## OUTLINE OF TIMING & USE OF FOUNDATION GRANTS FORMS

### 2021-22 Grants Resources

Click below to download the Grant Form you need

Read an Outline of when and what Forms to use

#### 1 Club Qualification MOU

#### District Grant Forms

#### 2 Project Proposal (Nominated Projects)

#### 3 Grant Application Form (Hum., Educ., & CNA)

Application Guidelines & Project Criteria

#### 4 Grant Pre-Payment Application

#### 5 Grant Report Form (Hum., Educ., & CNA)

#### Global Grant Forms

#### 6 GG Project Proposal to Reserve DDF

All other resources for Global Grants can be found online from the R.I. Website

- Once TRF approves the District Grant application, nominating clubs are advised that they can submit their Grant Application. Click on Tile 3 to download the **Club District Grant** Application Form. Guidelines for the Application Form, and approval Criteria, are downloadable from the tile immediately below Tile 3. When complete, submit the Application to the DGSC for review and approval.

**Implementation** – Commences upon Grant approval until your project finishes. All projects should finish by the end of May, in the Rotary year following that in which the Grant was awarded. If the project will not finish by 30<sup>th</sup> June of the year the Grant was awarded, your grant will be pre-paid. This allows payment by TRF of the next year's District Grant. Click on Tile 4 to download the Pre-Payment Application. When a pre-paid project finishes, if project funds have not been fully expended, a proportional amount of the Grant may have to be returned to TRF.

**Reporting** – Required for all Grant projects.

Upon project completion, collect all project and financial transaction documentation, and complete a Project Report. The form for this is downloadable from Tile 5. Submit your Report to the DGSC, along with all documents. The financial transactions should reconcile with the statement of expense in the Report. Acceptance of your report will trigger payment of your Grant, unless it has been pre-paid.

#### **Global Grants**

To apply for a Global Grant, you must advise the DGSC by completing a Global Grant Proposal. Whether or not you wish to reserve any DDF for the project, a proposal is essential for support. Click on Tile 6 to download the proposal form. All further resources for a Global Grant application are then available online from the RI website.

### Abbreviations

- DGE** District Governor Elect
- DRFC** District Rotary Foundation Chair/Committee
- DGSC** District Grants Subcommittee Chair
- DDF** District Designated Fund
- TRF** The Rotary Foundation

**Club Qualification** – Complete an MOU by end of July of the upcoming Rotary year. Any club applying for a TRF grant must be Qualified with the District. Qualification signifies that the club has accepted the financial, stewardship and administrative requirements of TRF for managing and implementing a project funded by a Foundation grant. This is confirmed by the current club president and his/her president elect each signing the **Club Qualification MOU**. If the President Elect is not yet available, the upcoming year's Club Secretary should sign. The MOU is downloadable by Clicking on Tile 1.

### Cycle of a Club District Grant

District Grant processing goes through three main phases:

- Planning, Submitting & Awarding – of the grants
- Implementation – of the associated project, and
- Reporting – at conclusion of the project, acceptance of which triggers payment of the club's grant.

**Planning, Submitting & Awarding** – Starts Feb for the upcoming Rotary year

- The DGE, DRFC and DGSC agree on how the District's Foundation SHARE funds will be divided for the
  - District Grant – from which Club District Grants will be paid,
  - Global Grant support – of DDF for new Global Grants,
  - Donations – to support Rotary projects such as Polio and Peace Centres.
- The DGSC applies to TRF for the District Grant as early in July as practicable. This application is accompanied by a Spending Plan that advises TRF of the projects and grants planned for the year. They must account for at least 80% of the District Grant being applied for. These projects are referred to as 'Nominated Projects.'
- Click on Tile 2 for the form to advise your **Nominated Project/s**. Acceptance of a club's nominated project does not approve a Club District Grant for it.