Rotary

Rotary
District 7690

Rotary Opens Opportunities

District Grants

District Chair, (PDG) Lloyd Navarro

Rotary Opens Opportunities

AGENDA – District Grants

- Welcome/Introduction (incoming) DRFC Claudia Cannady
  Chair, Lloyd Navarro

- District Grants - DACdb Chair, Lloyd Navarro
  - The Basics
  - Funding Concept & Club Allocations
  - The Business Cycle of A District Grant

- District Grants – A Footnote about Stewardship

- Lessons Learned – Ideas, Best Practices Participating Attendees

District Grants – The Basics

What you need to know

Goals for D7690 District Grants

- ✓ Every Club Participate
- ✓ Every Club Use Entire Club Allocation
- ✓ Enter Your Foundation Goals
- ✓ Final Report Timely Submitted
- ✓ Use District Grants as a Opportunity

Club Eligibility for Participation

- ✓ Meet Annual Club Qualification: Complete the Club Memorandum of Understanding.& attend the mandatory District Grant Management Session.
- ✓ Properly submit a Grant request via DACdb Grant Module.
- ✓ Submit Final Report with proper documentation for prior grants.
- ✓ Be up-to-date on RI and District Dues

Key Points

- Project must include a active Rotarian involvement; meaningful participation of club members. Fundraising events and monetary contributions are not considered to be "active participation".
- Clubs may partner to submit a multi-club project.
- The club must use its own matching funds equal to the amount of DDF allocation. The Club may submit more than one project. but do not exceed club allocation in request for funds.
- Although not required, D7690 places emphasis on the Areas of Focus
- Grants may be used for international projects, subject to special rules and scrutiny.
- Project monies may not be expended prior to notification of grant award.(July 1) Planning may begin at anytime – however, receipts dated and/or paid before notification are not eligible for reimbursement.
- The governing document for District Grants is: *Terms and Conditions For Rotary Foundation District Grants & Global Grants*

Key Dates

April 15 - MOU submitted to District Rotary Foundation Committee Chair

May 15 - Final Reports for previous year (2019-20) District Grants submitted to via DaCdb Grant Module

May 31 - District Grant Applications for 2020-21 must be submitted via DaCdb Grant Module & upload MOU

May 15, 2021 - Final Grant reports for 2020-21 District Grants submitted via DaCdb Grant Module

Jul-Aug – Stewardship Committee conduct Audit of District Grants – correct deficiencies immediately

Aug- early Sep – Grant cheques to Rotary Clubs

DACdb Grants Module Address & Club Process:

http://www.directoryonline.com/Rotary/SecLogin3.cfm?CFID=118238037&CFTOKEN=88657870

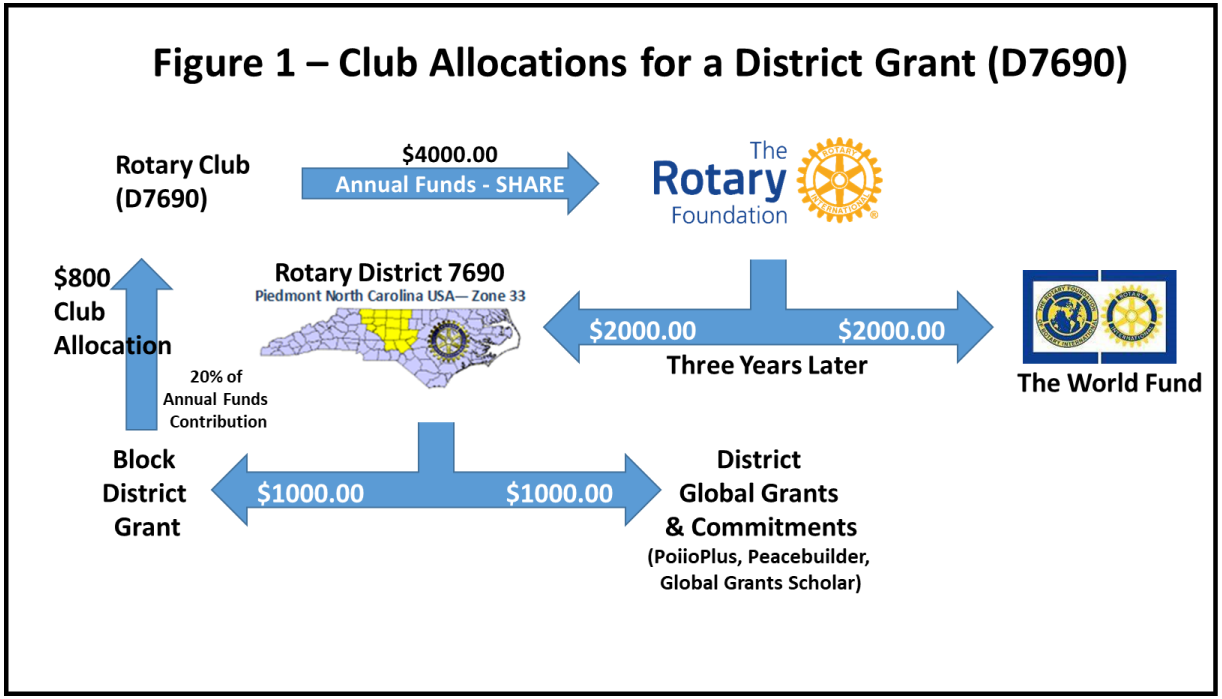
http://www.rotary7690.org/7690-DACdbGrantsMgt-Support/DACdbGrantsMgt-ClubProcess7690.pdf

District Grants – Funding Concept

1. Funding Model

   Max DDF: $263,849.61

   District Allocations: $106,968.00



2. Note: Rotary Club MUST at least match Allocation, but can contribute more.

District Grant Allocation 2020-2021 (as of: November 1, 2019)

CLUB NAME	Annual Fund 2017-2018	2020-2021 Adjusted Allocation
Alamance (Burlington)	$8,605.00	$1,721.00
Archdale-Trinity	$2,010.00	$402.00
Asheboro	$9,475.00	$1,895.00
Burlington	$3,625.00	$725.00
Carthage	$1,650.00	$400.00
Carthage Satellite (N. Moore)	$0.00	$400.00
Clemmons	$13,252.00	$2,651.00
Crescent (Greensboro)	$30,727.19	$6,146.00
East Greensboro	$2,484.00	$497.00
Eden	$3,600.00	$720.00
Furnitureland	$10,160.00	$2,032.00
Gate City	$19,665.00	$3,933.00
Global Trekkers (E-Club)	$1,884.97	$400.00
Graham	$16,500.00	$3,300.00
Greensboro	$30,085.00	$6,017.00
Greensboro Airport	$7,855.00	$1,571.00
Guilford (Greensboro)	$5,909.00	$1,182.00
High Point	$26,058.00	$5,212.00
Jamestown	$3,035.00	$607.00
Jonesboro (Sanford)	$9,848.00	$1,970.00
Kernersville	$21,190.00	$4,238.00
King	$2,400.00	$480.00
Lexington	$3,220.00	$644.00
Liberty	$2,210.00	$442.00
Madison-Mayodan	$3,050.00	$610.00
Mebane	$10.00	$400.00
Midstate (Asheboro)	$16,410.70	$3,283.00
Mocksville	$2,810.00	$562.00
Mount Airy	$13,657.90	$2,732.00
Pinehurst	$8,575.00	$1,715.00
Pittsboro	$155.00	$400.00
Randolph (Asheboro)	$14,840.00	$2,968.00
Reidsville	$5,310.00	$1,062.00
Reynolda (Winston-Salem)	$9,225.00	$1,845.00
Sandhills (Southern Pines)	$6,547.65	$1,310.00
Sanford	$6,320.00	$1,264.00
Siler City	$5,709.55	$1,142.00
Southern Guilford	$4,400.00	$880.00
Southern Pines	$12,210.00	$2,442.00
Stoneville	$2,690.50	$539.00
Stratford (Winston-Salem)	$6,900.00	$1,380.00
Summit (Greensboro)	$99,219.66	$19,844.00
Surry Sunrise	$8,995.00	$1,799.00
Thomasville	$26,200.00	$5,240.00
Troy	$9,355.00	$1,871.00
Western Forsyth	$3,700.00	$740.00
Winston-Salem	$15,475.00	$3,095.00
Yadkin Valley	$4,200.00	$840.00
Yadkinville	$7,100.00	$1,420.00
TOTAL	**$528,514.12**	**$106,968.00**

Rotary District Grants – D7690 Overview

Business Cycle of a District Grant (D7690)				
I	II	III	IV	V
Draft	Authorization	Submitted	Approved	Completion
January 31 – May 31 Target: Initiate grant within 30 days after Grants Management Tng	January 31 – May 31 Target: Within 30 days of initial draft	Deadline: May 31 Target: Within 30 days of initial draft	Deadline: June 30 Funds from RI: Aug 15 Target: Approval within 2 weeks of submission and District Block Grant approved and funding received from RI	Deadline: May 15 of following year Target: Within 30 days of completing project. Audit Cmte completes audit from Jul-Aug – clubs comply with audit or do not receive current year check
Rotary Club plans a single or multi-Club project and creates the district grant request in District's DACdb Grant Module	Club leaders review the request and authorize it for funding by gaining all Club signatures.	The Club's district grant planners submit the request to the District Grants Team and DRFC.	If the grant is approved, the District Team issues payment	Clubs carry out the project, and submits Final Report in DACdb. District Grants Team reviews and approves Final Report. District Stewardship Committee sample audits Final Reports

Rotary District Grants – Final Reports via DaCdb

http://www.rotary7690.org/7690TRF-DISTRICT-GRANTS.shtm

DACdb
District and Club database

Grants Management Module
District 7690

Club Process

Rotary District Grants – D7690 Overview

Checklist to Complete a District Grant (D7690)

I	II	III	IV	V
Draft	**Authorization**	**Submitted**	**Approved**	**Completion**
❑ 1. Plan the Project ❑ 2. Attend Grants Management Trng (Feb) and complete Club MOU (Apr 15). ❑ 3. Using correct Org Year, build request in DACdb ❑ 4. Ensure two Signatories named to authorize. ❑ 5. Fill out info in the Details, Clubs Involved, Contacts, Application Tabs & SAVE ❑ 6. Fill out the Budget Tab (ensure matching for Club allocation) ❑ 7. Upload Club MOU under Documents Tab & SAVE ACTION: AUTO EMAIL SENT TO ALL CLUB SIGNATORIES.	❑ 1. Initiate Club Grant Signing Process by clicking Collect Club Signatures ❑ 2. First Signatory Starts by Clicking Club: Sign Grant Application ❑ 3. Each Signatory Accesses Grant & Clicks Sign Grant ❑ 4. The Primary club rep responsible for the club's district grant request checks weekly to ensure all signatures are collected.	❑ 1. Last Club Signatory must Click: Submit Grant For District Approval ❑ 2. The Club President Elect checks to ensure District Grant request is submitted. (May 31) ❑ 3. The Club President Elect reports to AG District Grant submitted in Presidents Meeting ACTION: AUTO EMAIL RECEIVED BY ALL SIGNATORIES GRANT SUBMITTED TO DISTRICT ACTION: STATUS UPDATE SENT TO CLUB PEs & AGs TWICE MONTHLY AFTER PETS	❑ 1. District Grants Chair & DRFC reviews District Grant request in DACdb – each signs ❑ 2. District Chair approves & SAVES OR Rejects to return back to club for correction (JUN) ACTION: AUTO EMAIL SENT TO ALL CLUB SIGNATORIES THAT GRANT IS APPROVED ACTION: DISTRICT GRANTS CHAIR (ALNG WITH DG BUILDS DDF BLOCK DISTRICT GRANT (JUL-AUG). DG & DRFC SIGNS BLOCK DISTRICT GRANT (after Audit results); RI APPROVES IT (after previous year Block District Grant Final Report is completed and approved). ❑ 3. District Treasurer issues check and sends to DRFC to co-sign check. ❑ 4. DRFC sends check to Rotary Clubs for approved projects. ❑ 5. Club deposits check into Club Grant account.	❑ 1. The primary club rep responsible for the club's district grant initiates Final Report by recording actual income and expenses in Budget Tab and uploading documentation in Documents Tab & SAVE ❑ 2. Click Final Report Tab and enter requested information & SAVE ACTION: AUTO EMAIL SENT TO CLUB SIGNATORIES TO SIGN FINAL REPORT ❑ 3. Initiate Club Grant Signing Process by clicking Club Collect Final Signatures ❑ 4. First Signatory Starts by Clicking Club: Sign Final Report ❑ 5. Each Signatory Accesses Grant & Clicks Sign Final Report and Sign Grant ❑ 6. Last Club Signatory must Click: Submit Final Report (May 15, next year) ACTION: AUTO EMAIL RECEIVED BY ALL SIGNATORIES FINAL REPORT SUBMITTED TO DISTRICT ❑ 7. District Grants Chair & DRFC reviews Grant Final Report in DACdb – each signs & District Chair approves OR Rejects to return back to club for more documentation or corrections. ACTION AUTO EMAIL RECEIVED FINAL REPORT APPROVED PENDING DISTRICT AUDIT RESULTS ACTION: STATUS UPDATE SENT TO CLUB PRES & AGs TWICE MONTHLY UNTIL ALL GRANT FINAL REPORTS APPROVED ACTION: DISTRICT GRANT AUDIT: JULY-AUG

Rotary District Grants – Stewardship

Not just an Grants or Audit Committee Responsibility

Ultimately, it is the Rotary Club's responsibility to ensure a proper accountability and sound financial stewardship for funds provided by the District for their district grant project. It is the District's primary responsibility to ensure proper accountability and sound financial stewardship for funds provided by The Rotary Foundation in the Block District Grant.

The District Grant Final Report

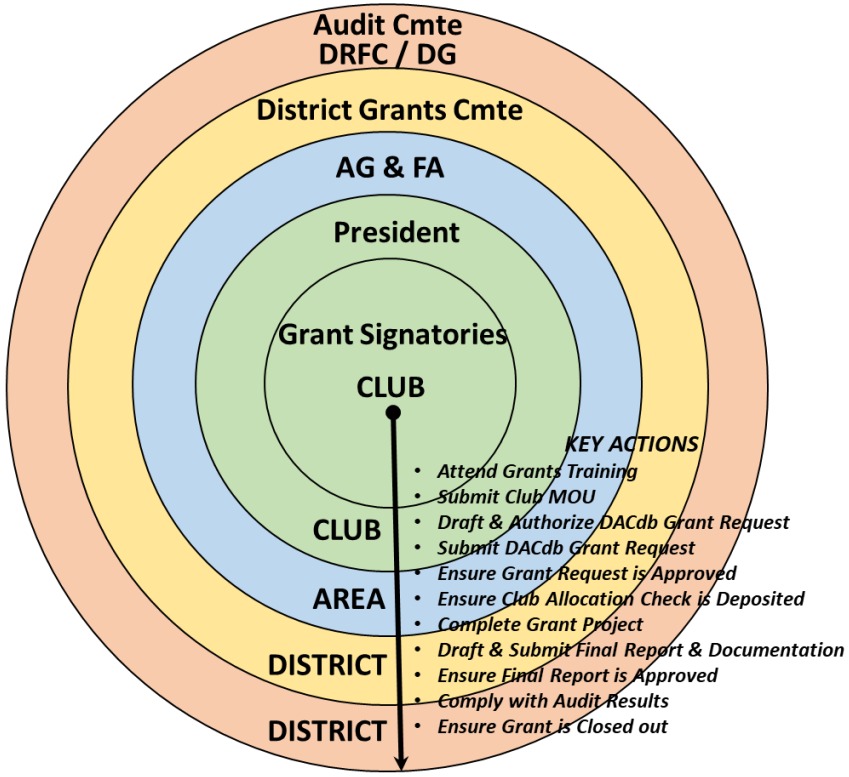
1) all valid receipts for funds expended that total to an amount equal to or greater than the District allocation funds plus the club matching funds amount,

(2) a copy of the cancelled checks expended for the project, and

3) acknowledgement letters or other records that show the funds were provide to the intended recipient of the district grant project.

Photos are not required, but can be used to show that the project was completed, and a copy of the cancelled District Funds check deposited into the club account is helpful.

Figure 3: Overlapping Responsibilities of Oversight



District Grants – Lessons Learned, Best Practices

- Club Memorandum of Understanding & Grant Request – Appropriate Signatories includes Club President-Elect

- We have transitioned fully to DACdb for District Grants. Check District website for instructions or District Grant Checklist, then ask for assistance.

- Timeliness of submissions – Meet key date deadlines!

- Pay attention to Org Year – we are now in multiple years of oversight.

- Ensure all dollar values are correct and balance per grant request. Do not exceed your total Club allocation in the budget area of the request.

- Rotary Club MUST at least match Allocation, but can contribute more.

- Use Overlapping Responsibilities for Oversight – ensures outstanding stewardship and reduces inefficiencies.

District Grants – Lessons Learned, Best Practices

- You are HIGHLY encouraged to complete Final Reports as soon as the District Grant project is completed.

- Grant Checks are mailed prior to Fall Seminars – check with your Rotary Club Treasurer for receipt.

- If your Club's Grant Final Report is audited, correct the deficiencies immediately.

- Anything you want to share with the group?

- Note: RUSH or other program $$ are not District Grant Allocation $$$ - should not include into DACdb.

Contact Your District Team Resources

Rotary

District Grants Chair:

Lloyd Navarro

910-690-2180

LloydNavarro@rotary7690.org

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