

GRANT MANAGEMENT TRAINING

DISTRICT 5150

January 27 and March 17, 2018



TOGETHER WE ARE ROTARY

Rotary International

Established 1905

501c-4 – Board of Directors

Plus General Secretary

Support Clubs and
Charter Clubs

Promote Membership

Collect Dues

Set Policies, Admin

The Rotary Foundation

Established 1917

501c-3 – Board of Trustees

Plus General Secretary

Raise Funds for
Programs and Projects

Manage Funds

Collect Donations

Set Terms /Conditions for Grants

The
Rotary
Foundation



OUR MISSION – OUR FOUNDATION



To **enable Rotarians** to
advance world
understanding, goodwill
and peace through ... the
improvement of health, the
support of education, and
the alleviation of poverty

PURPOSE OF OUR SESSION TODAY

To show YOU how to access Our Rotary Foundation funds to benefit your communities at home and around the world



GRANT MANAGEMENT TRAINING GOALS



- Understand how to manage a Rotary Foundation funded grant
- Learn stewardship expectations
- Prepare Clubs to implement the MOU
- Qualify Clubs to receive grant funds 2018-19

DOING GOOD IN THE WORLD



ROTARY FOUNDATION GRANTS



**We Are
People of
Action**

GUIDING DOCUMENTS



TRF Grant Terms and
Conditions

Memorandum of
Understanding

District Grant Policies

Guide to Global Grants

Where can you find these?

GUIDING PRINCIPLES

- Projects relate to TRF mission
- Active participation of Rotarians
- No spending prior to approval
- Implement the plan just as approved
- Adhere to US and host area Laws
- Proper Stewardship



GUIDING PRINCIPLES

- Sensitivity to host area
- Proper use of Rotary Marks
- Include Signage - Use new Voice and Visual Guidelines

Improvement Project
Rotary
Club of Chico and
The Rotary Foundation



WHAT GRANTS CANNOT FUND

- Continuous or excessive support of any one beneficiary
- Purchase of land or buildings
- Project signage >\$500
- Public Relations initiatives
- Contribution to another TRF grant

WHAT GRANTS CANNOT FUND

- Unrestricted cash donations to a beneficiary or cooperating organization
- Activities for which the expense has already been incurred
- Fundraising Activities
- Operating expenses of another organization

EFFECTIVE GRANT MANAGEMENT

Ensures that projects

- Have proper financial controls
- Adhere to technical standards
- Meet the needs of *participants*
- Fulfill objectives
- Safeguard funds



STEWARDSHIP

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

- **Rotarian supervision**
- Oversight of funds
- Financial records review
- Reporting any irregularities
- Timely submission of reports



RECAP

Which are characteristics of ALL Foundation-Funded Grants? Select all that are true.

- A. Includes Active Rotarian participation T
- B. Aligns with The Rotary Foundation mission T
- C. Allows unrestricted cash donations to a beneficiary organization F
- D. No spending prior to approval T
- E. Rotarians must manage project and project funds T

FUNDING BASICS

DISTRICT DESIGNATED FUNDS (DDF)

50% of Donations to Annual Fund
come back to District Each Year

3 Year
Cycle

50%

**District Designated
Funds (DDF)**

50%

World Fund

**District
Grants**

**Global Grants
Donations to Polio,
Peace Centers**

Global Grants
Peace Centers
Polio+



DISTRICT 5150 FAIR SHARE FUNDING

Fair Share DDF Allocation Calculation

prior 3 years

$$\text{Club AF Donations} \div \text{Total AF Donations} = \%$$

X Available District DDF

= Club Fair Share DDF

DISTRICT 5150 FAIR SHARE FUNDING

Fair Share DDF Allocation Hypothetical

$$\begin{array}{r} \frac{2016-2018 \text{ Club AF Donations}}{2016-2018 \text{ D5150 AF Donations}} = \frac{\$56,296}{\$1,050,000} \\ = 5.362\% \end{array}$$

X \$160,000 Available DDF

= \$8,578.44 **Club Fair Share DDF**

QUALIFICATION

DISTRICT QUALIFICATION

- The Governor, Governor Elect, and District Foundation Chair must complete an online process to review, answer questions and agree to the District MOU
- The District must ensure that Grant Management Training is available to all clubs
- Clubs must be Qualified to receive grant funds*

THE MEMORANDUM OF UNDERSTANDING

CLUB MEMORANDUM OF UNDERSTANDING

Agreement between the club and district and acknowledges that the club will undertake the proper implementation of grant activities and proper management of Foundation grant funds.

An Important Legal Document



MEMORANDUM OF UNDERSTANDING

- **Club Officer Responsibilities**
 - Implement, manage, and maintain club qualification
 - Ensure proper stewardship
 - Ensure no actual or perceived conflict of interest



MEMORANDUM OF UNDERSTANDING

- **Financial Management**

- Standard set of accounts with detailed ledger
- Disburse grant funds as appropriate
- Use checks or credit cards
- Maintain segregation of duties
- Establish an inventory system



MEMORANDUM OF UNDERSTANDING

- **Bank Account Requirements**
 - Separate account*
 - Account name should identify grant
 - Have 2 Rotarians signatories
 - Be low- or non-interest bearing
 - Plan for transfer of custody if signatories change

MEMORANDUM OF UNDERSTANDING

- **Report on Use of Grant Funds**
 - Complete
 - Accurate
 - On Time



MEMORANDUM OF UNDERSTANDING

- **Document Retention**

- Provide access to documents for transparency
- Retain for a minimum of five years or longer if local law requires
- Make copies
- What to keep?



MEMORANDUM OF UNDERSTANDING

- **Reporting Misuse of Grant Funds**

The club must report any potential and real misuse or mismanagement of grant funds to the District's Stewardship Chair:

William Gilmore wg-arch@outlook.com

REPAYMENT OF TRF GRANT FUNDS

This is the Club's responsibility.

For Global Grants, both Sponsor Clubs are responsible regardless of which Club has received the funds.

MOU AND ADDENDUM

- **Authorization and Agreement**
 - Clubs must be qualified for both District and Global Grant participation
 - 2018-19 Club President and President Elect sign*
 - 2018-19 Club President and one other have attended GMT
 - Be a Club in “Good Standing”

D5150 MOU ADDENDUM

- Clubs must be qualified by April 1, 2018 in order to receive DDF for either a District or Global Grant in 2018-19



MEMORANDUM OF UNDERSTANDING

- Read the MOU carefully
- Share with your Board
- Sign it with a clear mind and heart
- Apply for and implement district and global grants
- Make the world a better place

RECAP T or F

- The MOU is a serious document with specific club and officer responsibilities. T
- The MOU holds Rotarians to the highest ethical standards. T
- The MOU requires organization and transparency. T
- The best way to get your PE to sign is to cover up the writing and tell him/her you just want an autograph. F

TYPES OF GRANTS

ROTARY FOUNDATION GRANTS

- District grants
- Global grants
- Packaged Scholarships



VTTs and SCHOLARS

- Vocational Training Teams
 - District
 - Global
- Scholars
 - District
 - Global



DISTRICT GRANTS – WHAT ARE THEY?

- Managed by District
- Local or International projects
- Shorter term, smaller-scale projects
- Humanitarian Service, Vocational Training Teams (VTTs), Scholarships
- Aligned with TRF mission
- Within Areas of Focus encouraged



DISTRICT SCHOLARSHIPS

- Any level, length of time, location or area of study
- May be used for youth programs
- May be used for VTTs
- No Rotarians or lineal descendants of Rotarians; No employees of Rotary Clubs, Districts, RI or organizations that partner with TRF

DISTRICT VOCATIONAL TRAINING TEAMS

- Activities support mission of TRF
- May be Rotarians or non-Rotarians
- No age restrictions

GLOBAL GRANTS – WHAT ARE THEY?

- International – partners in 2 countries
- Larger, long-term projects
- Minimum budget \$30,000
- Support specified Area of Focus Goals
- Responsive to real needs
- Sustainable
- Measurable Outcomes
- Humanitarian- VTTs- Scholars

NEW GLOBAL GRANTS

Low Cost Shelters
Simple Schools



CONSTRUCTING LOW COST SHELTERS GLOBAL GRANTS

Guidelines and Application Appendix

LOW COST SHELTERS GUIDELINES

Section 1: Program Requirements

1. Low cost shelters are to be built as part of a comprehensive project that fits within one of the six areas of focus, with sustainable elements and training in the chosen area of focus. This will ensure the alleviation of poverty and prevent the deterioration of shelters and communities into a state of disrepair.
2. Projects need to include training in financial management and supplemental livelihood enhancement, such as vocational or entrepreneurship skills to ensure that occupants will be able to maintain their homes after receipt.
3. All projects must include adequate sanitation. Ideally projects will include toilets, sinks, and potable water on each property. In these instances, residents must also receive maintenance training to provide collective



CONSTRUCTING SIMPLE SCHOOLS USING GLOBAL GRANTS

Guidelines and Application Appendix

SIMPLE SCHOOLS GUIDELINES

Section 1: Program Requirements

1. Simple schools are an extremely limited project type that permits the construction of school buildings (e.g. 2-3 classrooms).
2. Simple schools must be built as a part of a comprehensive project that fits within one of the six areas of focus. Providing a school building alone cannot enhance educational outcomes, pedagogical teacher training is required for simple school projects.
3. Only primary schools, secondary schools, and early-childhood education centers are eligible for construction. Construction of mandated government curriculum are eligible for construction. Construction of colleges, universities, vocational training centers, and community centers is not eligible. Additions to existing schools, such as computer labs or dormitories, are not eligible.

GLOBAL SCHOLARSHIPS

- Graduate Level Studies
- Area of Focus
- Must study abroad
- International and Host Sponsors
- May be 1-4 years
- No Rotarians or lineal descendants etc.



GLOBAL GRANT SCHOLARSHIPS SUPPLEMENT

The Rotary Foundation funds scholarships with [global grants](#) and [district grants](#). This supplement on global grant scholarships. For information about district grant scholarships, clubs should contact their district Rotary Foundation committee, and districts should refer to [Lead Your District: Rotary I Committee](#) and [District Grants Scholarship Best Practices](#).

OVERVIEW

Through global grants, Rotarians can support future leaders in fields related to the [areas of focus](#):

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

Global grant scholarships fund graduate-level coursework or research for one to four academic years. A key feature of global grants is the partnership between the district or club in the study location (host sponsor) and the district or club in the scholar's home country (international sponsor). Both sponsors must be [qualified](#) before they can submit an application.

FINDING AND INTERVIEWING ELIGIBLE CANDIDATES

Global grant scholars plan to pursue a career in an area of focus, and their graduate-level educational goals should support this career interest. Pursuing a career in an area of focus means the scholar has a long-term commitment to measurable, sustainable change. Be sure that a candidate's previous work or volunteer experience, academic program, and career plans are strongly aligned with one of the [focus](#).

GLOBAL VOCATIONAL TRAINING TEAMS

- Must align with one of more Areas of Focus
- Rotarian leader with expertise, knowledge of Rotary
- At least two members with at least two years professional experience within Area of Focus
- Length of visit determined by sponsors

DISTRICT OR GLOBAL GRANT?



MAKING A SUSTAINABLE IMPACT

SUSTAINABLE PROJECTS

Giving a community the skills and knowledge to maintain project outcomes for the long term, after grant funds have been expended.



INVEST IN PEOPLE

MAKE A SUSTAINABLE IMPACT

Start with the community



Encourage local ownership



Provide training



Buy local



Find local funding



Measure your success



BUILD CAPACITY – HAND UP NOT HANDOUT

What Makes This Project Sustainable?

AREAS OF FOCUS

- Promoting Peace
- Fighting Disease
- Providing Clean Water
- Saving Mothers and Children
- Supporting Education
- Growing Local Economies



AREAS OF FOCUS – Global Grants

- Review Areas of Focus Policy
- Design project based on Area of Focus
- Ensure project relates to goals of chosen Area(s) of Focus

AREAS OF FOCUS POLICY STATEMENTS

With respect to the areas of focus policy statements, The Rotary Foundation notes that

1. The goals of the Foundation are to increase efficiency in grant processing and ensure quality of funded projects;
2. The content of each policy statement is intended to represent eligible and ineligible activities;
3. Eligible activities reflect those that Rotary clubs and districts have most often implemented;
4. Project planning is a bottom-up and host club/district-driven process;
5. All grant requests must comply with the policy statements related to each area of focus.

PEACE AND CONFLICT PREVENTION/RESOLUTION

Rotary supports the training, education, and practice of peace and conflict prevention and resolution.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to promote the practice of peace and conflict prevention/ resolution by:

1. Training leaders, including potential youth leaders, to prevent and mediate conflict;
2. Supporting peace-building in communities and regions affected by conflict;
3. Supporting studies for career-minded professionals related to peace and conflict prevention/resolution.

Parameters for Eligibility

TRF considers activities targeting the following to be within the scope of the peace and conflict prevention/resolution area of focus:

1. Community activities targeting non-Rotarian participants, including conferences, trainings, and camps, in support of nonviolence, peace-building, and human rights;
2. Facilitated conflict resolution workshops related to topics addressing community needs such as policy development, business activities across conflict lines, educational reform, and peace journalism;
3. Supporting initiatives addressing psychological effects of conflict;
4. Educating youth on preventive measures to avoid conflict;
5. Training programs or campaigns to address negative social dynamics in a community, including but not limited to anti-gang efforts and those to overcome radical differences;

NEEDS ASSESSMENT



- Base project on community's needs
- Assess resources of your Club and potential partners
- Talk to the community
- Maximize Public Image opportunities

NEEDS ASSESSMENT



ENGLISH (EN)

Required for all Global Grants 1 July 2018



Community meeting



Focus group



Survey



Asset inventory



Interview



Community mapping



GLOBAL GRANTS COMMUNITY ASSESSMENT RESULTS

Use this form to report community assessment findings to The Rotary Foundation when you apply for a global grant.

Assessing the strengths, weaknesses, needs, and assets of the community you plan to help is an essential first step in designing an effective and sustainable global grant project. See [Community Assessment Tools](#) for full instructions and helpful tips.

This form will help you report the results of your community assessment, and it's required when you apply for any humanitarian or vocational training team grant. Complete a separate form for each beneficiary community (e.g., school, health care system, or village), using information that is both current and specific to each community. Remember, you can't use global grant funds to cover the cost of doing an assessment, but you can use district grant funds.

Beneficiary community or institution

Click or tap here to enter text.

Groups in the community that would receive a clear, direct, and immediate benefit from the project

Click or tap here to enter text.

Beneficiaries' demographic information, if relevant to the project

Click or tap here to enter text.

Who conducted the assessment? (check all that apply)

- ☐ Host sponsor members
- ☐ International sponsor members
- ☐ A cooperating organization

WHAT SHOULD THE CLUB DO FIRST

Following the recent earthquakes in Nepal, a Rotary club in California establishes contact with a Rotary club in Kathmandu, Nepal.

The U.S. club could immediately donate as much as \$10,000 toward relief efforts and rebuilding, but it wants to maximize its impact by involving other U.S. clubs and accessing the matching funds available through a Global Grant.

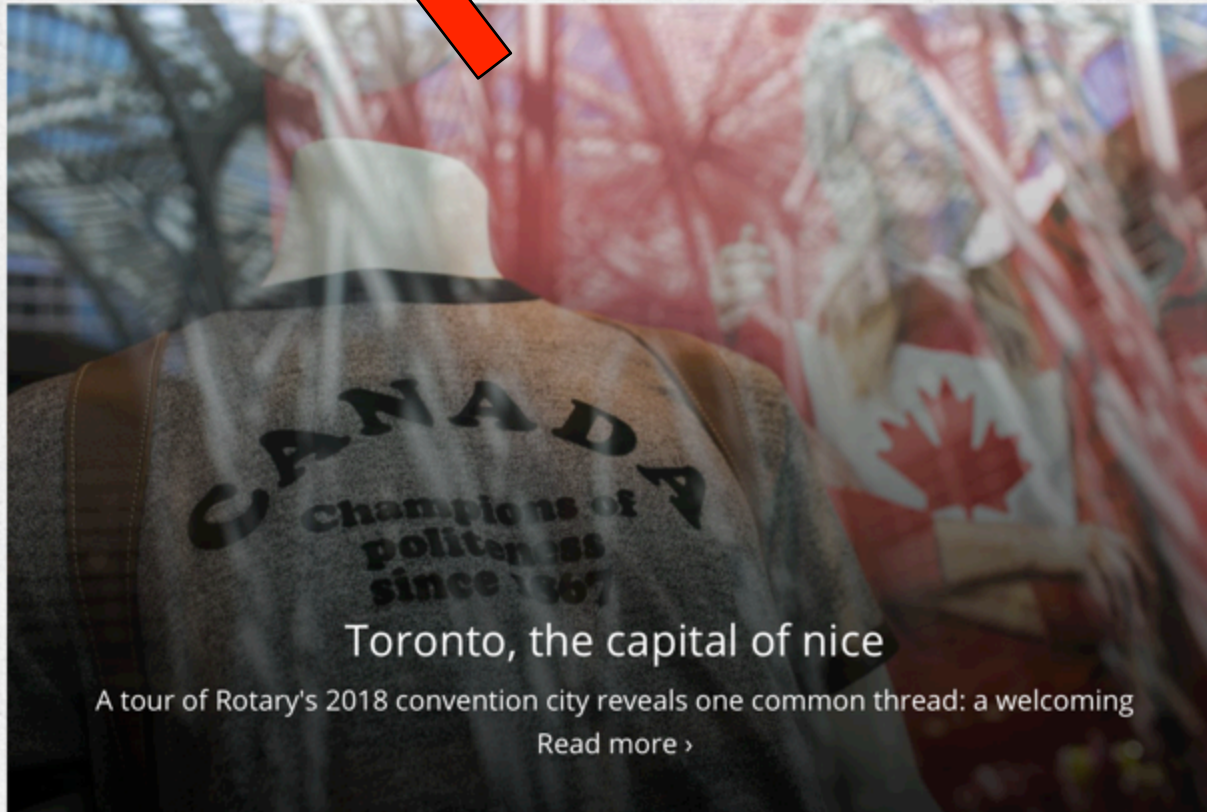
What should the club do first?

PARTNER TO MAXIMIZE IMPACT

PROJECTS AND PARTNERS

- RI Convention
- Project fairs
- Other Clubs / Districts
- Rotary Showcase/Rotary Ideas
- Rotary events – VTTs – Scholars - RYE
- Facebook
- International travel
- www.matchinggrants.org





Rotary Spotlight



Find inspiration around every corner at the 2018 Rotary Convention. [Join us in Toronto! >](#)



ROTARY IDEAS – ROTARY SHOWCASE

Exchange Ideas

Take Action

Learning & Reference

Manage

The Rotary Foundation

News & Media

Member Center

Give

Ways to Give

Planned Giving

Donor Recognition

GIVE NOW

End Polio

Develop Projects

Lifecycle of a Project

Rotary Club Central

Rotary Ideas

Rotary Showcase

Apply for Grants

Grant Center

District Grants

Global Grants

Qualification

Grant Travel

Empower Leaders

Sponsor a Rotaract club

Sponsor an Interact club

Organize a RYLA Event

Create a Scholarship

Start an Exchange

Support Peace Centers

Join a Rotarian Action Group

Form a Rotary Fellowship

Organize a Rotary Community Corps



PROJECTS AND PARTNERS – Rotary Ideas



Motorcycle library for underdeveloped village

Mandalamekar, one of underdeveloped village in Tasikmalaya, West Java Indonesia, has four elementary schools and all of them didn't have a school library or public library. To serve the community needs, providing mobile library such as motorcycle library is the best solution.



1



MAMMOGRAPHY SYSTEM FOR ABA AND ENVIRONS BY R.C. EZIUKWU ABA

Cancer is one of the world's deadliest diseases today. A good number of Aba residents die annually from the scourge, specifically, breast cancer. Most of the deaths recorded are due to late detection.



0

2

1



Mount Holly Community Garden Center

The Mount Holly Rotary Club is partnering with the Mount Holly Community Garden to build a butterfly garden, educational workshop area, and pergola.



0



Online Contributions



Volunteers



Materials



Partners

ROLE OF PARTNERS – Global Grant

SPONSOR ROLES

Host and international sponsors have different responsibilities. However, the roles of each sponsor also depend on the clubs involved, the community's strengths, and the nature of the project. As in all good relationships, communication is the key.



Host sponsor

- Initiates the project
- Conducts a community assessment
- Manages project implementation and budget
- Provides local assistance and support to vocational training teams and scholars during their time abroad
- Receives project funds



International sponsor

- Provides financial assistance, technical support, and other guidance
- Performs project tasks that can be done remotely, as well as participating in service during site visits
- Prepares any vocational training teams or scholars for travel and study abroad



Both sponsors

- Must be qualified to participate in a global grant
- Develop a project plan
- Have project committees that collaborate with each other
- Partner with a cooperating organization (a nongovernmental organization, community group, or government entity) if needed

WHO ELSE – COOPERATING ORGANIZATION

Cooperating Organization MOU

- Parties to Agreement
- Purpose
- Understandings
- Responsibilities
- Conflict of Interest
- Signatures



MEMORANDUM OF UNDERSTANDING

between

[HOST PARTNER]

and

[INTERNATIONAL PARTNER]

and

[COOPERATING ORGANIZATION]

1. SUBJECT

Global Grant #[GRANT NUMBER] in [COMMUNITY], [COUNTRY]

2. PURPOSE

A cooperating organization is any reputable non-Rotary organization or academic institution that provides expertise, infrastructure, advocacy, training, education or other support for the grant. Cooperating organizations must comply with all reporting and auditing activities required by the Rotary Foundation and provide receipts and proof of purchase as required. This document serves to establish a framework of cooperation and agreement between the aforementioned parties as it pertains to the implementation of a project financed by a Rotary Foundation Global Grant.

MATCH THE PHRASE AND DESCRIPTION

COOP
ORG

LOCATED OUTSIDE THE
PROJECT COUNTRY

INTL
SPONSOR

LOCATED IN/NEAR
COMMUNITY WHERE
PROJECT TAKES PLACE

HOST
SPONSOR

PROVIDES TECHNICAL
EXPERTISE, TRAINING,
ADVOCACY

PLAN YOUR PROJECT

SUCCESSFUL GRANT PROJECTS

- Address real community needs
- Are sustainable
- Involve participants, partners
- Have a solid plan
- Maintain proper stewardship of funds



PROJECT LIFECYCLE



PROJECT PLANNING – NUTS & BOLTS

- Form a 3-person grant committee; 2-person for District grant
- Assign roles
- Make a detailed implementation plan



PROJECT PLANNING – NUTS & BOLTS

- Incorporate a Public Image plan
- Create a Budget
- Establish a document retention plan
- Have a contingency plan



SET GOALS / MEASURABLE OUTCOMES

- Measurable
- Sustainable
- Qualitative (descriptive)
- Quantitative (numeric)



SET GOALS / MEASURABLE OUTCOMES

- Gather baseline data
- Determine method of measurement
- Create Timeline



BEGIN WITH THE END IN MIND

ENGLISH (EN)



GLOBAL GRANT MONITORING AND EVALUATION PLAN SUPPLEMENT

Global grant sponsors for humanitarian projects and vocational training teams must incorporate monitoring and evaluation measures within the area of focus section of the online grant application. This supplement contains The Rotary Foundation (TRF) standard measures for each area of focus as well as the standard terminology, definitions, and measurement methods. Following these standards helps ensure that the Foundation can track worldwide Rotarian efforts and accomplishments, and publish the results using the definitions used by other nonprofit organizations.

STEPS FOR MONITORING AND EVALUATION PLAN

1. Establish clear project goals.
2. Identify applicable Rotary Foundation standard measures.
3. Identify additional project-specific measures.*
4. Establish baseline data and the methods you'll use to collect data.
5. Submit the plan as part of the online application.
6. Collect data during the project, and monitor progress.**
7. Evaluate data and submit results to the online report. Modify the documentation to include actual



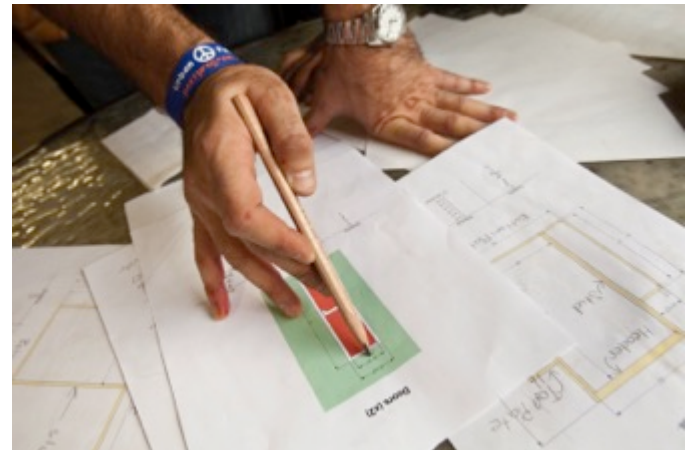
CREATE A BUDGET

- Realistic
- Competitive bidding
- Reasonable prices
- Disclose conflicts of interest



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



CONFLICT OF INTEREST

A. Your Club is planning a literacy project. One of your members who volunteers to be on the 3-person grant committee is also a board member of the organization that will be cooperating on the project.

B. Your Club is planning a water and sanitation project. You conducted a competitive bidding process for equipment purchase. The best bid was submitted by a company owned by one of your Club members.

Can this grant be funded? How to proceed?

DISTRICT GRANT FINANCING

- Qualified Clubs may use their Fair Share Funding to support District Grant projects
- If total requests exceed the District's Block Grant Funds, Grant Allocation Group will allocate available DDF
- Clubs are guaranteed 50% of requested DDF allocation if project meets guidelines

GLOBAL GRANT FINANCING

- Minimum \$30,000
- International sponsor provides 30% of funding
- Qualified Clubs allocate their Fair Share DDF
- DDF matched 100% by World Fund
- Rotarian and non-Rotarian cash contributions matched 50% by World Fund

SAMPLE BUDGET GLOBAL GRANT

- Clubs' contribution = \$10K
- 5% Club Cash '*admin fee*' \$500
- Clubs' Fair Share DDF = \$10K
- TRF matches DDF 1/1 = \$10K
- TRF matches Clubs .5/1= \$ 5K
- TOTAL PROJECT= \$35.5K

(TRF minimum funding = \$15K)

GLOBAL GRANTS – TIPS FOR SUCCESS

- Discuss with your Club (and Partners)
- Review *10 Tips for Improving Your Global Grant*
- Review *6 Steps to Sustainability*
- Use the Resources available to help

GRANT APPROVAL WORKSHOP

Would this project be approved for a Global Grant?

Would this project be approved for a District Grant?

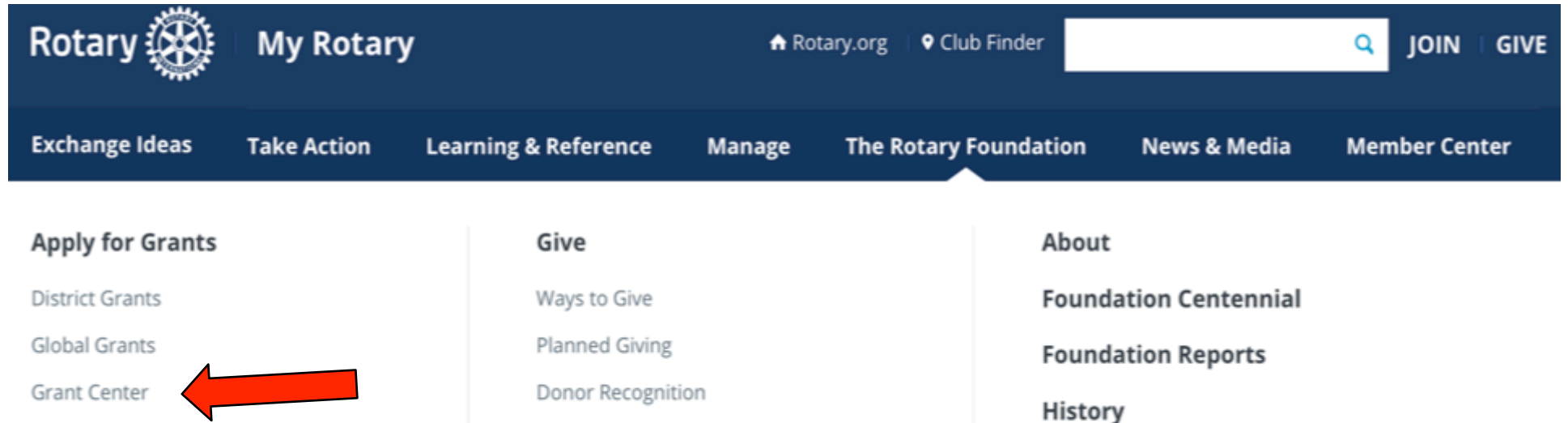
APPLY

GLOBAL GRANTS – HOW TO APPLY?

- Online only www.rotary.org/myrotary
- Can be submitted at any time
- Consult with District re DDF
- District confirms Club is Qualified
- Allow at least 90 days prior to travel



GLOBAL GRANT FIRST STEPS



- Sign in to My Rotary
- Select Grant Center from TRF Tab Menu



Rotary Grant Center

Welcome to Rotary grants! As Rotary members, we contribute our skills, expertise, and resources to solve some of the world's most serious problems. From providing clean water in local communities to promoting peace worldwide, Rotary grants can bring your project ideas to life.

Use the Rotary grants tool to apply for a grant, track its progress, report on it, and search for other grants in your district.

Types of grants

The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training teams. Here's an overview:

Global grants support large international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus. They range from \$15,000 to \$200,000.

District grants fund smaller-scale, short-term projects that address immediate needs in your community or abroad.

Packaged grants fund up to 10 scholarships each year for students in a master's program on water and sanitation at the UNESCO-IHE Institute for Water Education in Delft, Netherlands.

The lifecycle of a Rotary grant



Grant Resources

Questions about the grant process? We're here to help, from getting you started to final steps.

[Application Supplement for Microcredit Projects](#)

[Areas of Focus Policy Statements](#)

[Conflict of Interest Policy for Program Participants](#)

[Cooperating Organization Memorandum of Understanding](#)

[Global Grant Calculator](#)

[Global Grant Lifecycle](#)

[Global Grant Monitoring and Evaluation Plan Supplement](#)

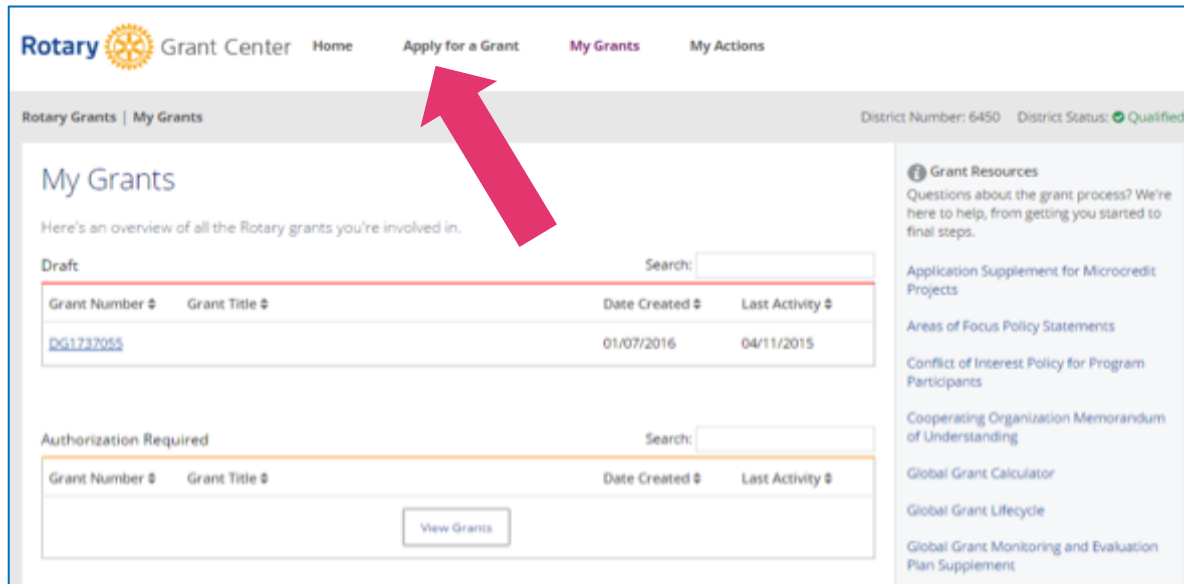
[Global Grant Scholarship Supplement](#)

[Grant Travel](#)

[Guide to Global Grants](#)

[Guidelines for Rotary](#)

GLOBAL GRANT FIRST STEPS



Rotary Grant Center Home **Apply for a Grant** My Grants My Actions

Rotary Grants | My Grants District Number: 6450 District Status: Qualified

My Grants

Here's an overview of all the Rotary grants you're involved in.

Draft Search:

Grant Number #	Grant Title #	Date Created #	Last Activity #
DG1737055		01/07/2016	04/11/2015

Authorization Required Search:

Grant Number #	Grant Title #	Date Created #	Last Activity #
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[View Grants](#)

Grant Resources
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- Application Supplement for Microcredit Projects
- Areas of Focus Policy Statements
- Conflict of Interest Policy for Program Participants
- Cooperating Organization Memorandum of Understanding
- Global Grant Calculator
- Global Grant Lifecycle
- Global Grant Monitoring and Evaluation Plan Supplement

Apply Now

Begin the grant application only after your club, district and partners have finalized the project plan and you've contacted your district about your project's funding. Answer every question clearly and concisely. Your regional grants officer will work with you to make any changes your application needs in order to meet grant criteria.

Choose the type of grant you're applying for:

Select Grant Type

Let's begin!

[Training Plan for Global Grants](#)

[Vocational Training Team Itinerary](#)

[Vocational Training Team Member Application](#)

GLOBAL GRANT 12 STEPS

All fields are required unless noted as "optional".

Step 1: Basic Information ✓

Step 2: Committee Members ✓

Step 3: Project Overview ✓

Step 4: Areas of Focus ✓

Step 5: Measuring Success ✓

Step 6: Location and Dates ✓

Step 7: Participants ✓

Step 8: Budget ✓

Step 9: Funding ✓

Step 10: Sustainability ✓

Finalize & Submit

Step 11: Review and Lock

Step 12: Authorizations

APPLICATION

Grant Application

All fields are required unless noted as "optional".

Step 1: Basic Information

Enter some basic information, and then we'll give your application a number.

What's the name of your project?

100/100 characters

What type of project are you planning?
Check all that apply. This will tell us what else we need to ask you.

- ☒ **A humanitarian project**
Address community needs and produce sustainable, measurable outcomes
- ☐ **Vocational training**
Build skills within a community by supporting a team of professionals that will travel abroad to train or learn from colleagues in the community they visit
- ☐ **A scholarship**
Fund international graduate-level study by someone seeking a career within an area of focus

Select the primary host and international contacts for this project.

Name	District	Sponsor	Role
+Add Primary Contact			Notify Primary Contact

Switch host, international contacts, and committees.

[Save & Continue](#) [Exit](#)

GRANT INFORMATION

GRANT NUMBER
...

STATUS
...

LAST ACTIVITY
24/10/2016

Print application (PDF)

Grant Resources
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- Global Grant Calculator
- Global Grant Lifecycle
- Global Grant Monitoring and Evaluation Plan Supplement
- Global Grant Scholarship Supplement

Grant Application

Saving Mothers and Children in Guinea

All fields are required unless noted as "optional".

Step 1: Basic Information ✓

Step 2: Committee Members

GRANT INFORMATION

GRANT NUMBER
GG1744555

STATUS
Draft

LAST ACTIVITY



Who will

Name

+ Add

Who will

Name

+ Add

Do any

☐ No

Save

Who will serve on the grant's Host committee?

Name

Club

District

Role

+ Add

Who

Name

+ Add

Do a

☐

Save

AUTO-SUBMIT

☒ Auto-submit is ON

Step 1: Basic Information ✓

Step 2: Committee Members

Step 3: Project Overview

Tell us a little about your project. What







Save & Continue

Exit

Step 4: Areas of Focus

Which area of focus will this project support?

Select at least one area. Note that we'll ask you to set goals and answer questions for each area of focus you select.

- ☐  Peace and conflict prevention/resolution
- ☐  Disease prevention and treatment
- ☐  Water and sanitation
- ☐  Maternal and child health
- ☐  Basic education and literacy
- ☐  Economic and community development

Save & Continue

Exit

Skip

GRANT CENTER HOW TO GUIDE

Webinar:
<https://vimeo.com/212329193>

HOW TO USE THE GRANT CENTER

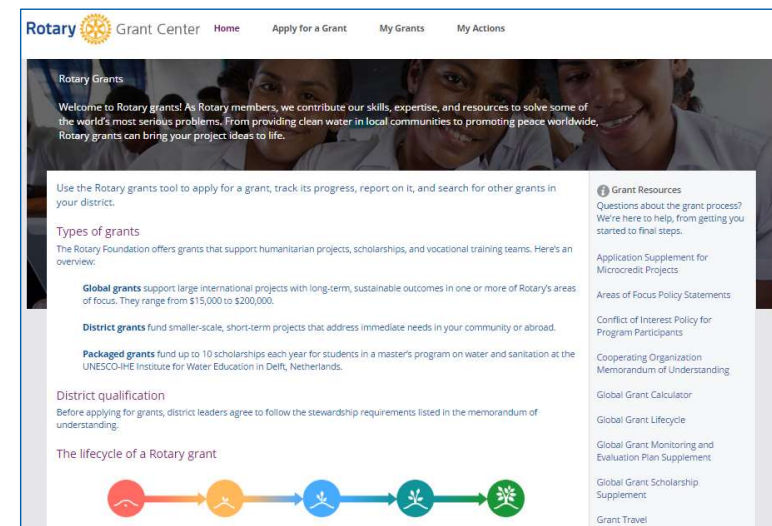
The Grant Center is the place to go for everything you need to do online for your Rotary Foundation grants, and it keeps all of Rotary's grant-related resources handy for you. This guide will show you how to:

- [Navigate the Grant Center](#)
- [Apply for a Global Grant](#)
- [Authorize a Global Grant Application \(club presidents and district leaders\)](#)
- [Enter Global Grant Bank Account Information](#)
- [Report on a Global Grant](#)
- [Authorize a Global Grant Report](#)
- [Apply for a District Grant \(district leaders only\)](#)


For general information about grants, go to Rotary.org's [Grants](#) page.

Navigate the Grant Center

The Grant Center's landing page gives an overview of Rotary grants and links to helpful resources.



RESOURCES

Rotary  ENGLISH (EN)

GLOBAL GRANT APPLICATION TEMPLATE

The following pages outline the questions you will be asked on the online global grant application. You can use this document for planning purposes. Find the actual grant application at www.rotary.org/grants.

Step 1: Basic information

What's the name of your project?

What type of project are you planning? (humanitarian project, vocational training, scholarship)

All global grants support activities within Rotary's areas of focus

Select the primary host and international contacts for this project.

The primary host contact lives in the country where the project, primary international contact lives in another country. Both can be related correspondence and reporting to The Rotary Foundation

Step 2: Committee members

The committee will include at least three members from the host international sponsor.


Who will serve on the grant's host committee?

Who will serve on the grant's international committee?

Do any of these committee members have potential conflicts of interest?

A conflict of interest is a relationship through which an individual causes benefit for such individual or such individual's family, an organization in which such individual is a trustee, director, or officer


Global Grant Application Template (December 2016)

Rotary 

MY PROFILE CATALOG COURSE DISCUSSIONS MY COURSES COURSE HISTORY

All Subjects > Rotary Grants

COURSE

 **Rotary Grants: Building a Global Grant**

Audience: All Rotarians

This course focuses on how to develop a global grant that will have long-term impact and relates to one or more of Rotary's areas of focus.

Updated: 7/2016

Filter by: ABC
START
COMPLETED



A GUIDE TO GLOBAL GRANTS



Rotary  TAKE ACTION: www.rotary.org/grants

DISTRICT GRANTS – HOW TO APPLY?

Online on District website



We are People of Action!

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[District Positions](#) [Blog](#) [Contact Us](#) 



DISTRICT GRANTS – HOW TO APPLY?

Rotary District 5150 District Grant Application 2018-2019

Thank you for the good work your Club is about to do! Applications for DDF (District Designated Funds) are completed on-line and must be received by JUNE 1, 2018. See District Grant Policy 2018-2019 ([link](#)) and TRF "Terms and Conditions for Rotary Foundation District Grant Projects" ([link](#)) for reference, as needed. If you have questions about this application, please contact District Grants Coordinator Cyndy Simms at districtgrants5150@gmail.com or 909-544-9966. Thank you for applying!

LEAD CLUB NAME *

IF MULTI-CLUB PROJECT, LIST NAMES OF SUPPORTING CLUBS *

PROJECT NAME *

Briefly describe the project and what the project will do. *

Start Date *

Estimated Completion Date *



DISTRICT GRANTS TIMELINE

MOU and Addendum signed and submitted
by April 1, 2018

District Grant application submitted by
June 1, 2018

Final or Interim Report submitted online
no later than May 1, 2019 or for projects
over one year, **Final Report no later than**
May 1, 2020

IMPLEMENT, MONITOR, EVALUATE

IMPLEMENT AND MONITOR

- Communicate!
- Follow project plan
- Monitor
- Questions?
- Get pre-approval for changes
- Keep good records



REMINDERS

KEEP

- All grant correspondence
- Beneficiary documentation
- Cooperating organization MOUs and memoranda
- Vendor documentation
- Inventory
- Photos of project

EVALUATE

Evaluation

- Assists with reporting
- Improves future projects
- Is based on goals
- Is ongoing
- Allows for resolving problems
- Identifies successes



REPORT, SHARE, CELEBRATE

REPORTING REQUIREMENTS

Why is reporting on the use of grant funds so important?



DISTRICT GRANT REPORTS

For 2018-19 Grants:

- Submit Final or Interim no later than May 1, 2019
- For projects longer than one year, Final Report no later than May 1, 2020
- Online through District website
- Return unused funds to District



GLOBAL GRANT REPORTS: Frequency

Progress reports

- Within 12 months of first payment
- Every 12 months through the life of the grant

Final report within
2 months of completion



GLOBAL GRANT REPORTS Include:

- How partners were involved
- Type of activity
- Evaluation of project goals
- How area of focus goals were met
- How funds were spent
- Number of beneficiaries and how they benefited

GLOBAL GRANT REPORTS – UNUSED FUNDS

Handling of unused funds

- >\$500 TRF must approve use for project-related expenses OR return to TRF and credited to World Fund
- <\$500 may be used for activities that meet the global grant eligibility requirements and do not require pre-approval from TRF

CELEBRATE SUCCESS – SHARE THE STORY!



RESOURCES

GRANTS – ASSISTANCE!

- District Grants Chair, Committee & Technical Resource Cadre
- District Rotary Foundation Chair & Committee
- District International Service Chair
- District website www.district5150.org



GRANTS – ASSISTANCE!

- TRF Technical Resource Cadre
- Assistant RRFC & RRFC
- TRF Grants Officer
- Areas of Focus Managers
- Rotarian Action Group
- www.rotary.org/myrotary
- [www.zone2526.org/TRF Resources](http://www.zone2526.org/TRFResources)
- Colleagues

ZONE GRANT MANAGEMENT VIDEOS

www.zone2526.org



[Home](#) [About Us](#) [Events](#) [News & Resources](#) [Strengthen Clubs](#) [TRF](#) [Members](#) [Contact Us](#)

The Rotary Foundation

The Rotary Foundation transforms your gifts into projects that change lives both close to home and around the world. As the charitable arm of Rotary, we tap into a global network of Rotarians who invest their time, money, and expertise into [our priorities](#), such as [eradicating polio](#) and [promoting peace](#). Foundation [grants](#) empower Rotarians to approach challenges such as poverty, illiteracy, and malnutrition with sustainable solutions that leave a lasting impact. Strong [financial oversight](#), a stellar [charity rating](#), and a unique [funding model](#) mean that we make the very most of your contribution. [Give](#) and become a part of Rotary's life-changing work!

The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, good will and peace through the improvement of health, the support of education and the alleviation of poverty.

[TRF Resources](#)

Contact Us

Steve Lewis | Zone 25 – Regional Rotary Foundation Coordinator

[Email Steve](#)

Marge Cole | Zone 26 – Regional Rotary Foundation Coordinator

[Email Marge](#)

TRF RESOURCES

[TRF Resource Guide \(Zones 25 & 26\)](#)

[TRF Centennial](#)

[Annual Giving \(Every Rotarian, Every Year\)](#)

[Contribution & Recognition](#)

[Endowments, Major Gifts & Planned Giving](#)

[Grants – Global and District Guides, Manuals & Reports](#)

[Paul Harris Society](#)

[PolioPlus \(End Polio Now\)](#)

[Rotary Peace Centers](#)

[TRF Logos & Infographics](#)

[Videos, Webinars, Presentations & Newsletters](#)



GRANTS – ASSISTANCE!

- Grant Management Training Videos
 - Overview and MOU
 - District Grants
 - Global Grants



Zone 25 Grant Management Training Modules



TERMS OF QUALIFICATION

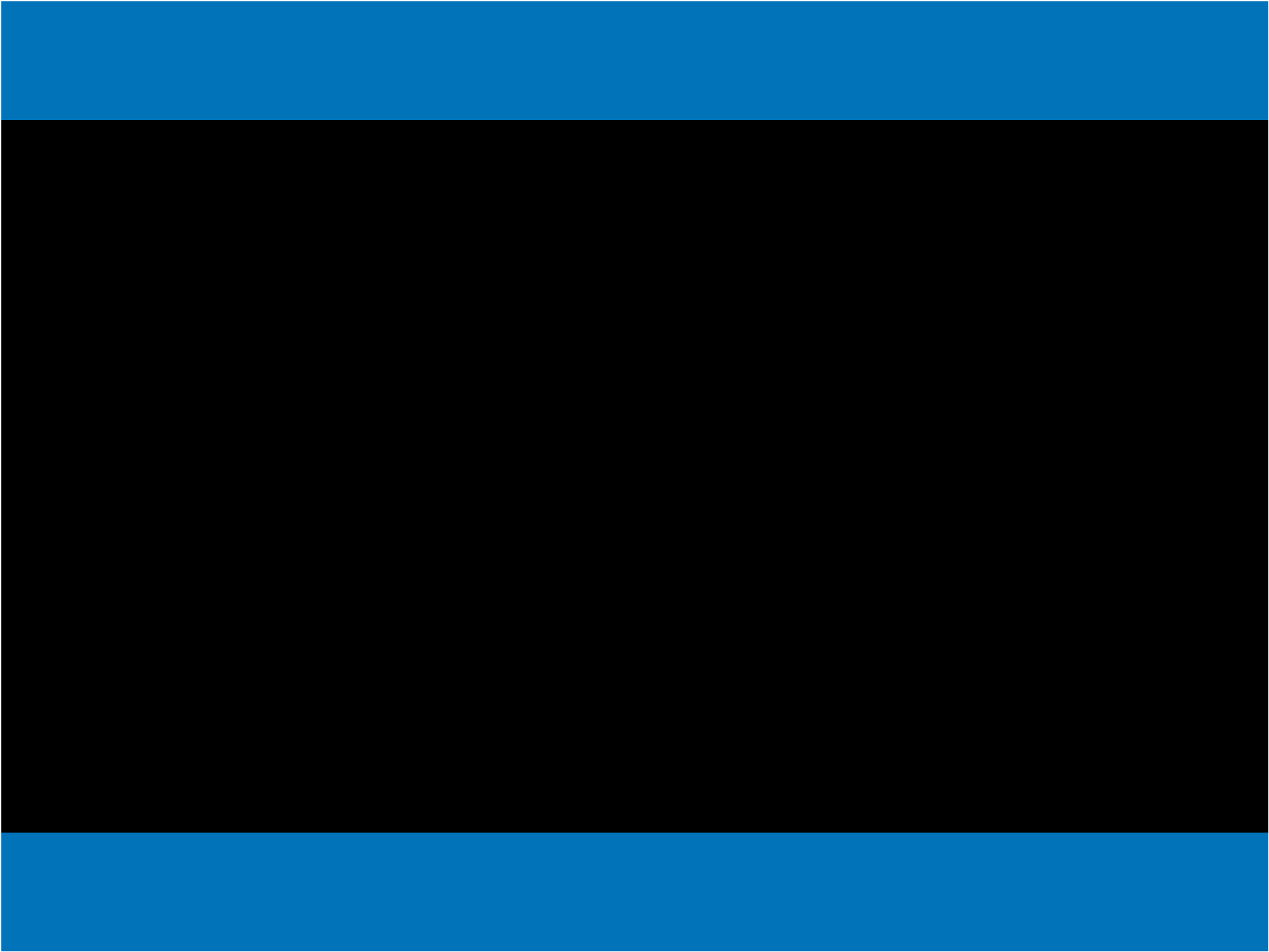
- Valid for one year
- Club responsible for grant funds
- Disclose conflicts of interest
- Cooperate with all audits
- Use grant funds properly
- Implement the Club MOU, including D5150 Addendum



People with Passion,
People of Action,
can change the world



Photos © Rotary International



GRANT MANAGEMENT TRAINING for 2018-19

Congratulations!



Thank You!