

**GLOBAL GRANTS PROGRAM TRAINING**  
**November 4, 2017**

<b>WELCOME AND OPENING REMARKS</b> Video: Century of Doing Good in the World	David Hellman, Chair District Grants Comm.	10 min
<b>GENERAL OVERVIEW</b> <ul style="list-style-type: none"><li>○ GRANTS FROM TRF FOR \$15,000 TO \$200,000</li><li>○ MINIMUM GRANT SIZE \$30,000</li><li>○ REQUIRES TWO CLUBS IN DIFFERENT COUNTRIES TO SPONSOR</li><li>○ REQUIRES BOTH CLUBS AND DISTRICTS TO BE QUALIFIED</li></ul>	Keith Axtell	12 min
<b>SIX AREAS OF FOCUS--WHAT IS ELIGIBLE ? (Handout)</b> <ul style="list-style-type: none"><li>○ HUMANITARIAN PROJECTS</li><li>○ GLOBAL SCHOLARSHIPS</li><li>○ VOCATIONAL TRAINING TEAMS (VTT)</li></ul>	Steve Wright	12 min
<b>COMMUNITY NEEDS ASSESSMENT</b> <b>COMMUNITY INVOLVEMENT</b>	Keith Axtell	15 min
<b>BREAK</b>		10 min
<b>SUSTAINABILITY REQUIREMENT</b> <b>GOALS AND MEASURING SUCCESS</b>	Steve Wright	12 min
<b>FINANCING GUIDELINES</b>	Dave Hellman	10 min
<b>ACTIVE PARTICIPATION KEY TO SUCCESS</b> <ul style="list-style-type: none"><li>○ ROTARIAN PARTICIPATION</li><li>○ COOPERATING ORGANIZATIONS</li><li>○ MEMORANDUM OF UNDERSTANDING</li><li>○ CONFLICTS OF INTEREST ISSUES</li></ul>	Steve Wright	10 min
<b>APPLICATION PROCESS</b> <ul style="list-style-type: none"><li>○ APPLICATION SUBMITTED ON-LINE: <a href="http://WWW.ROTARY.ORG">WWW.ROTARY.ORG</a></li><li>○ APPLICATION FIRST STEP - QUALIFYING</li><li>○ ONLINE REVIEW OF APPLICATION</li></ul>	Keith Axtell	25 min
<b>HELP FROM DISTRICT GRANTS COMMITTEE</b> <ul style="list-style-type: none"><li>○ ROTARY GRANT RESOURCES AND DEADLINES (handouts)</li><li>○ COMMITTEE CONTACT LIST (handout)</li><li>○ TECHNICAL RESOURCE NETWORK (handout)</li></ul>	Dave Hellman	6 min
<b>QUESTIONS AND ANSWERS</b>	Dave Hellman, Keith Axtell Steve Wright	5 min



## 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;

6. Communication and arbitration among parties previously engaged in direct conflict;
7. Vocational training teams supporting the above activities;
8. Scholarships for graduate-level study in programs related to peace and conflict prevention/resolution.

TRF considers activities targeting the following to be outside the scope of the peace and conflict prevention/resolution area of focus and as such are not eligible for global grant funding:

1. Peace conferences targeting Rotarian participants;
2. Enrollment at a Rotary Peace Center partner university in the same, or similar, academic program as those pursued by Rotary Peace Fellows.

### **Elements of Successful Humanitarian Projects and Vocational Training Teams**

Global grants are:

1. Sustainable – communities are able to address their peace and conflict needs after the Rotary club/district has completed its work;
2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;
3. Community driven – designed by the host community based upon the needs they have identified;
4. Aligned with an area of focus – as defined in the policy documents.

### **Elements of Successful Scholarships**

Global grants support graduate-level scholarships for career-minded professionals. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of peace and conflict prevention/resolution;
2. Academic program alignment with peace and conflict prevention/resolution.
  - a. Examples of preferred academic programs include conflict prevention/resolution, peace and justice studies, and international relations or law with a specialization in peace and conflict;
  - b. Programs that will be considered favorably include those that focus directly on peace and conflict issues;
  - c. Programs that will not be considered favorably include those that relate to general international relations or law.
3. The applicant's career plans as they relate to peace and conflict prevention/resolution.

## **DISEASE PREVENTION AND TREATMENT**

Rotary supports activities and training that reduce the cause and effect of disease.

## **Area of Focus Statement of Purpose and Goals**

TRF enables Rotarians to prevent disease and promote health by:

1. Improving the capacity of local health care professionals;
2. Promoting disease prevention programs, with the goal of limiting the spread of communicable diseases and reducing the incidences of and complications from non-communicable diseases;
3. Enhancing the health infrastructure of local communities;
4. Educating and mobilizing communities to help prevent the spread of major diseases;
5. Preventing physical disability resulting from disease or injury;
6. Supporting studies for career-minded professionals related to disease prevention and treatment.

## **Parameters for Eligibility**

TRF considers activities targeting the following to be within the scope of the disease prevention and treatment area of focus:

1. **Prevention and Control of Communicable Diseases**
  - a. Testing with counseling and referrals/admission to treatment;
  - b. Education on preventing transmission of disease and supplies that may assist with these prevention efforts;
  - c. Providing mobile technology equipment and vehicles to monitor and treat patients;
  - d. Equipment supported by the local health infrastructure that includes appropriate operational and maintenance plans;
  - e. Provision of prevention programs, such as vaccinations, male circumcision or pre-exposure prophylaxis;
  - f. Providing technical platform and training in its operation for the tracking and monitoring of disease diagnosis and treatment;
  - g. Treatment of communicable diseases that includes a component to prevent disease, improve training of health service professionals, or provide public health education to improve the long-term health of a community.
2. **Mosquito-Borne Illnesses and Illnesses Transmitted by Other Vectors (Organisms That Transmit Pathogens)**
  - a. Providing bednets and preventative medications;
  - b. Providing supplies that help with safe storage of standing water and training on interrupting the lifecycle of mosquitoes;
  - c. Developing drainage systems to prevent and control diseases;
  - d. Providing for removal of vectors other than mosquitoes.

### **3. Prevention and Control of Noncommunicable Diseases**

- a. Providing materials and training to prevent physical disability due to disease or injury;
- b. Community education, intervention programs, and early screening programs with the goal of reducing the incidence and prevalence of chronic diseases;
- c. Providing mobile technology equipment and vehicles to monitor and treat patients;
- d. Equipment supported by the local health infrastructure that includes appropriate operational and maintenance plans;
- e. Lifesaving surgeries and surgeries to address congenital problems provided they are supported by the local health infrastructure and include appropriate follow-up care;
- f. Treatment of noncommunicable diseases that includes a component to prevent disease, improve training of health service professionals, or provide public health education to improve the long-term health of a community.

### **4. Other Activities**

- a. Scholarships for graduate-level study in programs related to disease prevention and treatment;
- b. Vocational training teams that focus on educational components related to activities outlined above.

TRF considers activities targeting the following to be outside the scope of the disease prevention and treatment area of focus and as such are not eligible for global grant funding:

1. Projects that consist exclusively of an equipment purchase, unless supported by the local health infrastructure that includes appropriate operational and maintenance plans;
2. Medical missions/surgical team trips that do not provide educational outreach programs or significant capacity building in the project country.

### **Elements of Successful Humanitarian Projects and Vocational Training Teams**

Global grants are:

1. Sustainable – communities are able to address their disease prevention and treatment needs after the Rotary club/district has completed its work;
2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;
3. Community driven – designed by the host community based upon the needs they have identified;
4. Aligned with an area of focus – as defined in the policy documents.

### **Elements of Successful Scholarships**

Global grants support graduate-level scholarships for career-minded professionals. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of disease prevention and treatment;

2. Academic program alignment with disease prevention and treatment. Examples of academic programs include public health, advanced degrees in nursing and medicine;
3. The applicant's career plans as they relate to disease prevention and treatment.

## **WATER AND SANITATION**

Rotary supports activities and training to provide access to safe drinking water and basic sanitation.

### **Area of Focus Statement of Purpose and Goals**

TRF enables Rotarians to ensure that people have sustainable access to water and sanitation by:

1. Providing equitable community access to safe water, improved sanitation and hygiene;
2. Strengthening the ability of communities to develop, fund and maintain sustainable water and sanitation systems;
3. Supporting programs that enhance communities' awareness of the benefits of safe water, sanitation and hygiene;
4. Supporting studies for career-minded professionals related to water and sanitation.

### **Parameters for Eligibility**

TRF considers activities targeting the following to be within the scope of the water and sanitation area of focus:

1. Access to safe drinking water (i.e. supply and quality);
2. Access to improved sanitation;
3. Improved hygiene;
4. Community development and management of systems for sustainability;
5. Watershed management and food security plans that depend on adequate water supply;
6. Water for production (i.e. crops, livestock, etc.);
7. Vocational training teams supporting the above activities;
8. Scholarships for graduate-level study in programs related to water and sanitation.

### **Elements of Successful Humanitarian Projects and Vocational Training Teams**

Global grants are:

1. Sustainable – communities are able to address their water, sanitation and hygiene needs after the Rotary club/district has completed its work;
2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;
3. Community driven – designed by the host community based upon the needs they have identified;
4. Aligned with an area of focus – as defined in the policy documents.

## **Elements of Successful Scholarships**

Global grants support graduate-level scholarships for career-minded professionals. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of water and sanitation;
2. Academic program alignment with water and sanitation. Examples of academic programs include water science/engineering, water management, environmental science, epidemiology, and parasitology;
3. The applicant's career plans as they relate to water and sanitation.

## **MATERNAL AND CHILD HEALTH**

Rotary supports activities and training to improve maternal health and reduce child mortality for children under five.

### **Area of Focus Statement of Purpose and Goals**

TRF enables Rotarians to improve the health of mothers and their children by

1. Reducing the mortality and morbidity rate for children under the age of five;
2. Reducing the maternal mortality and morbidity rate;
3. Improving access to essential medical services, trained community health leaders and health care providers for mothers and their children;
4. Supporting studies for career-minded professionals related to maternal and child health.

### **Parameters for Eligibility**

TRF considers activities targeting the following to be within the scope of the maternal and child health area of focus:

1. Prenatal care for pregnant women;
2. Labor and delivery services for pregnant women;
3. Providing medical equipment to underserved clinics and hospital maternity wards, when provided in conjunction with prenatal care educational activities;
4. Training and/or "train the trainer" initiatives for maternal and child health professionals and leaders (i.e. doctors, nurses, community health workers, and midwives);
5. Training and/or "train the trainer" initiatives for skilled birth attendants;
6. Prenatal and child care educational activities for parents and families;
7. Initiatives that build upon and/or improve capacity of existing community initiatives and/or local women's groups pertaining to maternal and child health;

8. Education about and access to birth control, family planning and/or disease prevention and reduction initiatives, inclusive of HIV/AIDS and human papillomavirus (HPV);
9. Education and training on sexual health, particularly for adolescent girls;
10. Vocational training teams that focus on educational components related to activities outlined above, whether intended for the public, traditional health leaders or health professionals in the recipient community;
11. Scholarships for graduate-level study in programs related to maternal and child health;
12. Relevant immunization for children under five;
13. Relevant immunizations for women and adolescent girls;
14. Interventions to combat pneumonia, diarrhea, malaria, and/or measles for mothers and children under five;
15. Interventions to reduce the impact of sexually transmitted disease in women, e.g., HIV/AIDS, cancer of the cervix, gonorrhea and syphilis, etc.
16. Preventing mother-to-child transmission of HIV;
17. Promotion of breastfeeding and other interventions to fight malnutrition;
18. Surgical repair of fistula;
19. Surgeries/procedures to correct cleft palates;
20. Lifesaving surgeries and surgeries to address congenital problems provided they are supported by the local health infrastructure and include appropriate follow-up care.

TRF considers activities targeting the following to be outside the scope of the maternal and child health area of focus and as such are not eligible for global grant funding:

1. Medical missions/surgical team trips that do not provide significant capacity building in the project country.

### **Elements of Successful Humanitarian Projects and Vocational Training Teams**

Global grants are:

1. Sustainable – communities are able to address their maternal and child health needs after the Rotary club/district has completed its work;
2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;
3. Community driven – designed by the host community based upon the needs they have identified;
4. Aligned with an area of focus – as defined in the policy documents.

### **Elements of Successful Scholarships**

Global grants support graduate-level scholarships for career-minded professionals. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of maternal and child health;
2. Academic program alignment with maternal and child health. Examples of academic programs include epidemiology, nutrition, global health, public health, and health promotion and degrees in nursing and medicine;
3. The applicant's career plans as they relate to maternal and child health.

## **BASIC EDUCATION AND LITERACY**

Rotary supports activities and training to improve education for all children and literacy for children and adults.

### **Area of Focus Statement of Purpose and Goals**

TRF enables Rotarians to ensure that all people have sustainable access to basic education and literacy by:

1. Involving the community to support programs that strengthen the capacity of communities to provide basic education and literacy to all;
2. Increasing adult literacy in communities;
3. Working to reduce gender disparity in education;
4. Supporting studies for career-minded professionals related to basic education and literacy.

### **Parameters for Eligibility**

TRF considers activities targeting the following to be within the scope of the basic education and literacy area of focus:

1. Enhancing quality basic primary and secondary education, seeking to involve local school officials when possible;
2. Educating adults in literacy;
3. Providing teacher training in curriculum implementation, effective instructional methodologies and/or student assessment;
4. Strengthening educational experience through improved materials and facilities that complement curriculum and/or teacher training;
5. School desk purchases, when accompanied by a detailed and verifiable plan to improve basic education and literacy;
6. Vocational training teams supporting the above activities;
7. Scholarships for graduate-level study in programs related to basic education and literacy.

TRF considers activities targeting the following to be outside the scope of the basic education and literacy area of focus and as such are not eligible for global grant funding:

1. Projects that consist exclusively of equipment purchases;
2. Projects that provide tuition or school supplies without the means for the community to provide

these in the future.

3. Projects that the community is not able to continue after grant funding ends.

### **Elements of Successful Humanitarian Projects and Vocational Training Teams**

Global grants are:

1. Sustainable – communities are able to address their basic education and literacy needs after the Rotary club/district has completed its work;
2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;
3. Community driven – designed by the host community based upon the needs they have identified;
4. Aligned with an area of focus – as defined in the policy documents.

### **Elements of Successful Scholarships**

Global grants support graduate-level scholarships for career-minded professionals. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of basic education and literacy;
2. Academic program alignment with basic education and literacy. Examples of academic programs include education, literacy, curriculum development, special education, and school administration;
3. The applicant's future career plans as they relate to basic education and literacy.

## **ECONOMIC AND COMMUNITY DEVELOPMENT**

Rotary supports investments in people to create measurable and enduring economic improvement in their lives and communities.

### **Area of Focus Statement of Purpose and Goals**

TRF enables Rotarians to invest in people by creating sustainable, measurable and long term economic improvements in their communities and livelihoods by

1. Building the capacity of entrepreneurs, community leaders, local organizations, and community networks to support economic development in impoverished communities;
2. Developing opportunities for productive work;
3. Reducing poverty in underserved communities;
4. Supporting studies for career-minded professionals related to economic and community development.

### **Parameters for Eligibility**

TRF considers activities targeting the following to be within the scope of the economic and community

development area of focus:

1. Access to financial services for the poor, which may include but are not limited to microcredit, savings, or insurance;
2. Training related to economic and community development including but not limited to entrepreneurship, community leadership, vocational, and financial literacy;
3. Small business/cooperative/social enterprise development and income-generating activities for the poor, including but not limited to the organization of village-wide businesses that provide employment;
4. Agricultural development for subsistence and small farmers, including but not limited to the facilitation of access to markets;
5. Community-led and coordinated adopt-a-village or comprehensive community development activities;
6. Vocational training teams supporting the above activities;
7. Scholarships for graduate-level study in programs related to local, regional or national economic development and programs specifically designated in community development.

TRF considers activities targeting the following to be outside the scope of the economic and community development area of focus and as such are not eligible for global grant funding:

1. Community infrastructure projects, unless they result in a significant increase in the ability of community members to produce and distribute goods and services that create personal resources;
2. Community beautification projects;
3. Construction or rehabilitation of community centers.

### **Elements of Successful Humanitarian Projects and Vocational Training Teams**

Global grants are:

1. Sustainable – communities are able to address their economic and community development needs after the Rotary club/district has completed its work;
2. Measurable – sponsors can select standard measures for their area of focus from the Monitoring and Evaluation Toolkit or use their own measures to show the good results of their work;
3. Community driven – global grants are designed by the host community based upon the needs they have identified;
4. Aligned with an area of focus – as defined in the policy documents.

### **Elements of Successful Scholarships**

Global grants support graduate-level scholarships for career-minded professionals whose goal is to improve the economic and social well-being of those in poverty (poor, low-income or underserved communities). TRF considers the linkages among the applicant experience, the academic program and the applicant career plans when evaluating global grant scholarship applications.

1. The applicant's previous work experience in the field of economic and community development.

Applicants are expected to demonstrate how their work contributed to the economic well-being of poor, low-income or underserved communities at the local, regional or national level.

2. Academic program alignment with economic and community development:
  - a. Examples of preferred academic programs include social science degrees with a specific focus on economic and community development, and business degrees tailored for social business, micro entrepreneurship or microcredit;
  - b. Programs that will be favorably considered include those that
    - i. Focus on local, regional or national economic development strategies;
    - ii. Focus on addressing economic issues of poor, low-income and underserved communities;
    - iii. Support social business development, such as a tailored track within a Masters of Business Administration program;
    - iv. Provide a business degree to teach entrepreneurial skills or startups at the local, regional or national level;
    - v. Include “community development” in the name of the program or tailored track;
    - vi. Improve the coaching or advising capability of an individual working with small businesses or entrepreneurs.
  - c. Programs that will not be favorably considered include those that
    - i. Focus on purely theoretical, macro-level economics, politics or finance;
    - ii. Support general private business development, such as a Masters of Business Administration for non-social professions;
3. The applicant's career plans as they relate to economic and community development.
  - a. Careers that will be considered favorably include at least one of the following:
    - i. Focus on issues to improve the economic and social well-being of poor, low-income and underserved communities at the local, regional and national level;
    - ii. Are in a non-profit or social enterprise environment;
    - iii. Are related to advocacy for economic and social well-being, e.g. for the poor, low-income, youth, women, underserved and indigenous peoples.
  - b. Careers that will not be considered favorably include those that focus on general business activities, general administration in a private or corporate environment or general social work.

## **STEPS FOR SUBMITTING A COMPLETED GLOBAL GRANT APPLICATION**

There are several steps to submitting the application:

1. The online application has to be "locked" by one of the primary contacts. That means no more changes can be made to the application. It can only be "unlocked" by staff at The Rotary Foundation.
2. The Primary Contacts in both Rotary clubs must agree to certain terms and authorize submission of the application.
3. Then the District Governor and the District Foundation Chair need to authorize the use of DDF for their District(s) . The District Foundation Chair also needs to okay submission of the application.
4. The Rotary Club president needs to sign off on the legal agreement that will appear at the end of the grant application.
5. When all these are done, one of the Primary Contacts needs to click on the "Submit" button. Then the review by The Rotary Foundation can begin.

Keith Axtell  
Global Grants Technical Cadre  
District 5150

## RESOURCES FOR GLOBAL GRANT PROJECTS

Guide to Global Grants - 1000-EN

Areas of Focus Policy Statements (explains what is eligible in each Area)

How to Use the Grant Center (helps with the application)

Community Assessment Tools- 605C- EN

Communities in Action: A Guide to Effective Projects- 605A-EN

Global Grant Community Assessment Results (new form required July, 2018 and after)

Global Grant Monitoring and Evaluation Plan Supplement

Terms and Conditions for Rotary Foundation District Grants and Global Grants

Global Grant Application Template

Find Your Rotary Grant Officer (assignments and contact information by country)

Learning Center Course: "Rotary Grants: Building a Global Grant"

### NOTE:

The above policies and publications can be located online at the Rotary Grants Center. The direct website is [www.rotary.org/en/our-programs/grants](http://www.rotary.org/en/our-programs/grants) . You can find this through a Google search for "rotary.org/grants" .



# ROTARY GRANTS RESOURCES

## [Rotary Grants Handout](#)

Use these resources and consult with experts early in the planning process to improve your projects.

Resource	Assistance & Resources	Contact
<b>Regional Grants Officer</b>  <a href="#">Contact List</a>	Rotary staff review your grant application and help with grant questions. Rotary publications, handbooks, project planning guides, grant manual, and other training materials help clubs strengthen their service work.  <a href="#">Tips</a> ▪ <a href="#">Global Grants</a> ▪ <a href="#">Manual</a> ▪ <a href="#">Resources</a> ▪ <a href="#">Presentation</a> ▪ <a href="#">Terms</a>	Zone 25: Renée Reiling 847-866-3314 <a href="mailto:renee.reiling@rotary.org">renee.reiling@rotary.org</a>  Zone 26: Cecelia Walter 847-424-5266 <a href="mailto:cecelia.walter@rotary.org">cecelia.walter@rotary.org</a>
<b>Area of Focus Managers</b>	Rotary staff offer guidance on grant use and project design by Rotary's Area of Focus. <a href="#">Guide (965)</a> ▪ <a href="#">Policy Statement</a>	<a href="#">Contact List</a>
<b>Newsletter</b>	<a href="#">Sign up</a> for the "Giving & Grants" newsletter to get the latest information, tips, and resources.	
<b>Online Fair For Grants</b>	Rotarian created platform that allows you to list a project, create a project, and get ideas to incorporate into grants.	<a href="#">District Web</a> ▪ <a href="#">Global Web</a>
<b>Ideas</b>	Rotary tool to find potential grant partners, post your project needs, and get ideas to incorporate into grants. <a href="#">Guides</a> ▪ <a href="#">Video</a> ▪ <a href="#">Four Part Series</a>	<a href="#">Website</a> ▪ <a href="#">Questions</a>
<b>Showcase</b>	Rotary tool to share successes or look for project ideas. <a href="#">Guides</a> ▪ <a href="#">Video</a>	<a href="#">Website</a> ▪ <a href="#">Questions</a>
<b>Discussion Groups</b>	Rotary tool for the Rotary Grants discussion group — Share ideas, ask questions, and get advice from other Rotary members. <a href="#">Guides</a> ▪ <a href="#">Video</a>	<a href="#">Website</a> ▪ <a href="#">Questions</a>
<b>District Leadership</b>	Your district Rotary Foundation committee offers advice and guidance. Subcommittees: Grants ▪ Stewardship ▪ Scholarship ▪ Vocational Training Teams <a href="#">Improving Projects</a> ▪ <a href="#">District Committee Manual</a> ▪ <a href="#">Tips</a>  International Service Chair helps identify prospective partners, subject matter experts comprised of local/regional members of the Rotary family, and other resources to increase the quality, impact, and sustainability of global grants.	International Service Chair Grants Chair  [see your district website]
<b>Cadre of Technical Advisers</b>	Rotary members volunteer their time and professional expertise in Rotary's six areas of focus and evaluate the technical feasibility of projects, as well as reviewing project finances and grant management.	<a href="#">Website</a> <a href="#">Technical Coordinators</a>
<b>Regional Zone Team</b>	This team supports and promotes Foundation grants and grant management activities. Teach clubs and districts about Rotary grants.	<a href="#">Zone 25 Team</a> <a href="#">Zone 26 Team</a>
<b>Rotarian Action Group</b>	A Rotarian Action Group is an autonomous group of Rotarians, program participants and alumni who are experts in a particular field, such as microcredit or water and sanitation. Group members share their expertise by collaborating with clubs and districts on service projects.	<a href="#">Directory</a> ▪ <a href="#">Website</a> <a href="#">Find a Rotary Action Group</a>
<b>Peace Corps</b>	Peace Corps Volunteers offer access to local contacts, community development insights and funding possibilities. They can help identify beneficiaries, assist with training and project implementation to ensure a project's sustainability.	<a href="#">Working with Peace Corps</a>
<b>Reference Sheets</b>	<a href="#">Basic Education &amp; Literacy</a> ▪ <a href="#">Disease Prevention &amp; Treatment</a> <a href="#">Economic &amp; Community Development</a> ▪ <a href="#">Maternal &amp; Child Health</a> ▪ <a href="#">Water &amp; Sanitation</a> <a href="#">Peace &amp; Conflict Prevention/Resolution</a> ▪ <a href="#">Increasing Sustainable Service</a> ▪ <a href="#">TRF Funding Model</a>  Note: Reference Sheets were created by Corporate Communications	

## RELEVANT GRANT DATES FOR 2018

**January 27, 2018:** Grants Management and MOU (Memorandum of Understanding with The Rotary Foundation and District 5150) training at Redwood High School. President Elects and President Nominees (or substitute member) must take this training or the one on March 17, 2018. If they do not, their Clubs will be ineligible to sponsor District or Global Grants during the 2018-19 Rotary year.

**January 31, 2018:** David Hellman, Grants Committee Chair, will send reminder to Clubs that District Designated Funds (DDF) Global Grant Allocation forms for the 2017-18 Rotary Year must be submitted to David Hellman at davidhellman@earthlink.net by February 28, 2018 or the District will make the allocation of unallocated DDF to other Global Grant projects/Polio Plus/Peace Fellows

**March 1, 2018:** DDF Global Grant Allocation Forms for the 2017-18 Rotary year must be submitted to David Hellman, Grants Committee Chair, at davidhellman@earthlink.net or the District will make the allocation of unallocated DDF to other Global Grant projects/Polio Plus/Peace Fellows. The Rotary Club DDF "Fair Share" Transfer Approval and the Rotary Club DDF "Fair Share" Use Form are available on the District 5150 Website to make those allocations.

**March 17, 2018:** Makeup for Grants Management and MOU (Memorandum of Understanding with The Rotary Foundation and District 5150) training will occur after the District Assembly at Redwood High School for those President Elects and President Nominees (or substitute members) who did not take training on January 27, 2018 and anyone else who would like to take the training. President Elects and President Nominees (or substitute member) must take one of those trainings or their Clubs will be ineligible to sponsor District or Global Grants during the 2018-19 Rotary year.

**April 1, 2018:** The Rotary Foundation "Club Qualification Memorandum of Understanding" and the "District 5150 Addendum" must be signed by the President Elect and President Nominee (or substitute person if none) and sent to William Gilmore, District Stewardship Committee Chair, at wg-arch@outlook.com or the Club will not be allowed to do its own District or Global Grants during the 2018-19 Rotary year.

**April 20, 2018:** David Hellman, Grants Committee Chair, will send Clubs an estimate of the DDF that will be available to them during the 2018-19 Rotary year.

**May 1, 2018:** Clubs must submit their Final or Interim Report for 2017-18 District Grants to Cyndy Simms (District Grants Coordinator) at districtgrants5150@gmail.com. If they are not submitted timely, the Club will not be allowed to do its own District or Global Grants during the 2018-19 Rotary year.

**June 1, 2018:** Clubs desiring to do a District Grant project during the 2018-19 Rotary year must submit their District Grant Application to Cyndy Simms, District Grants Coordinator, at districtgrants5150@gmail.com. The Application must be signed by the President Elect and President Nominee. If the Application is not submitted timely, the Club will not be allowed to do its own District Grant during the 2018-19 Rotary year.

**June 30, 2018 (or thereabouts):** David Hellman, Grants Committee Chair, will submit the District's 2017-18 Rotary year District Grants Report to The Rotary Foundation. If a report is not submitted timely the District will not be able to do District Grants during the 2018-19 Rotary year.

**July 5, 2018:** David Hellman, Grants Committee Chair, will notify the Clubs of the amount of DDF available to the Club for the 2018-19 Rotary year.

## **RELEVANT GRANT DATES FOR 2018**

**July 15, 2018:** Cyndy Simms, District Grants Coordinator, will notify the Clubs of the amount of District Grants the District has approved (subject to The Rotary Foundation approval). When the TRF approval is received, the Clubs will be notified by Cyndy Simms, District Grants Coordinator, of final approval (approximately August 15, 2018).

**July 20, 2018:** David Hellman, Grants Committee Chair, will submit the District's Application to The Rotary Foundation for District Grants for the 2018-19 Rotary year.

DISTRICT 5150 GRANTS COMMITTEE  
RY 2017-2018

David (Dave) Hellman, Chair  
RC Mission San Rafael  
851 Irwin St, Suite 205  
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(415) 457-4411 (w)  
(415) 457-0356 (fax)  
[davidhellman@earthlink.net](mailto:davidhellman@earthlink.net)  
Appointed- One year term

Holly Axtell  
RC Marin Evening  
410 Manzanita Avenue  
Corte Madera, CA 94925  
(415) 924-5930 (h & fax)  
[Axtellhol@aol.com](mailto:Axtellhol@aol.com)  
Dist. International Chair  
Appointed-One year term

Keith Axtell  
RC Marin Evening  
410 Manzanita Avenue  
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(415) 924-5930 (h & fax)  
[keaxtell@aol.com](mailto:keaxtell@aol.com)  
Advisor Position as  
District Resource Network Chair

Rick Chinn  
RC Millbrae  
1240 Tournament Drive  
Hillsborough, CA 94010  
650-573-0328 (w)  
650-573-8889 (h)  
650-678-0715 (cell)  
650-573-0328 (fax)  
[rbchinn@sbcglobal.net](mailto:rbchinn@sbcglobal.net)  
Advisor position as  
District Water & Sanitation Comm.  
Chair

Houston Lawrence  
RC South San Francisco  
992 Crane Avenue  
Foster City, CA 94404  
650-574-8916 (h)  
650-619-0307 (cell)  
650-341-9945 (fax)  
[Houston@loans4ahouse.com](mailto:Houston@loans4ahouse.com)  
Appointed-One year  
remaining on term

Cynthia (Cyndy) Simms  
RC Foster City  
PO Box 161  
San Mateo, CA 94401  
(909) 544-9966 (cell)  
[cyndysimms@me.com](mailto:cyndysimms@me.com)  
District Grants Coordinator  
Appointed-One year term

Anita T. Stangl  
RC San Francisco #2  
130 Frederick #3  
San Francisco, CA 94117  
(415) 215-1099 (cell)  
[anita@allianceforsmiles.org](mailto:anita@allianceforsmiles.org)  
Appointed-Two years  
remaining on term

Steve Wright  
RC Pacifica  
PO Box 228  
Pacifica, CA 94044  
(650) 898-8496  
(650) 898-8473 (fax)  
(877) 316-4504 (toll free)  
[stevewright@granitecollects.com](mailto:stevewright@granitecollects.com)  
Appointed-Three year term

## DISTRICT 5150 TECHNICAL RESOURCE NETWORK

Assistance is available to help Rotary Clubs with applications for Rotary Foundation Global Grants. To request assistance, please contact Keith Axtell at [keaxtell@aol.com](mailto:keaxtell@aol.com).

### The following technical experts are available to assist:

Keith Axtell- [keaxtell@aol.com](mailto:keaxtell@aol.com)  
415-924-5930

Mark Shirley- [markshirley@mac.com](mailto:markshirley@mac.com)  
415-945-9593

Rick Chinn- [rbarry.61@gmail.com](mailto:rbarry.61@gmail.com)  
650-678-0715

Steve Wright- [stevewright@granitecollects.com](mailto:stevewright@granitecollects.com)  
650-898-8496

Jay Colingham- [jaycolingham@gmail.com](mailto:jaycolingham@gmail.com)  
425-233-8288

### Technical advice is available in the following areas:

Global Grant Application Process-

Keith Axtell  
Mark Shirley  
Steve Wright

Water and Sanitation Projects-

Rick Chinn  
Jay Colingham

Disease Prevention and Treatment

Jay Colingham

Health Projects

Mark Shirley

Microcredit, and Economic and  
Community Development Projects-

Keith Axtell

First Name	Last Name	Rotary Positions	District	Club	Area of Focus Expertise	Professional Background / Notes	Language Skills (other than English)	Email
Cecelia	Babkirk	Current DRFC / past DGSC	5170	Cupertino	Economic & Community Development / Financial Auditing	Micro-Finance; Accounting	Spanish	rotariancecelia@gmail.com
Michael	Barrington		5160	Concord	ECD; DPT; WASH	Monitoring and Evaluation Consultant; healthcare management	Spanish & French	majb7016@gmail.com
Cecil "Pancho"	Padilla		5160	Winters	Economic & Community Development	Tremendous amount of Rotary grant experience	Spanish	cpadilla@dcn.org
Jay	Colingham		5150	San Francisco Evening	Disease Prevention & Treatment / Water & Sanitation	Environmental Protection Specialist, Public Health	Spanish	jaycolingham@gmail.com
Gary	Vilhauer		5160	Danville	Economic & Community Development	Construction Manager		vilhauer@pacbell.net