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
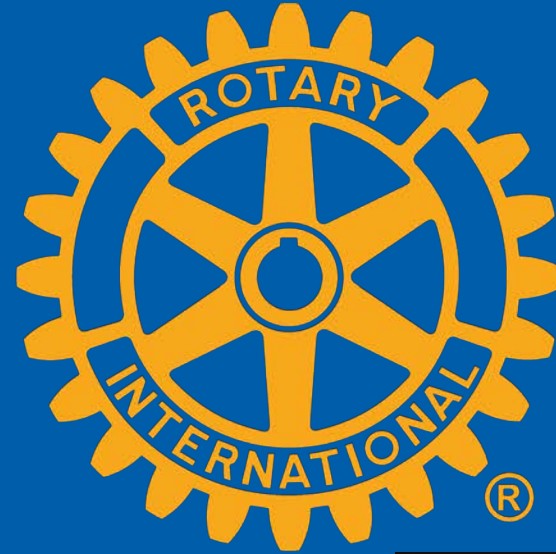Plus General Secretary

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

The Rotary Foundation

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
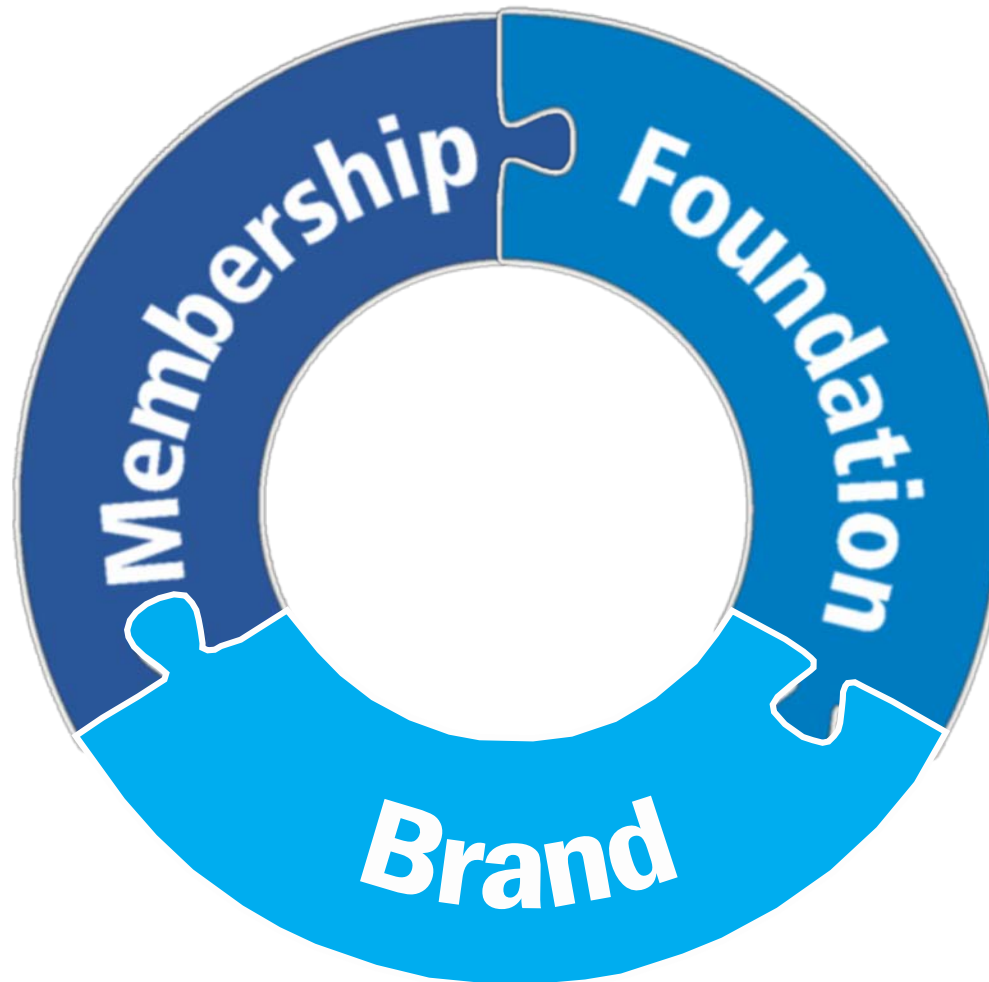
GRANT MANAGEMENT TRAINING GOALS

- Understand how to manage a Rotary Foundation funded grant

- Learn stewardship expectations

- Prepare Clubs to implement the MOU

- Qualify Clubs to receive grant funds 2019-20

The Rotary Foundation

DOING GOOD IN THE WORLD

FOUNDATION-MEMBERSHIP-PUBLIC IMAGE

ROTARY FOUNDATION GRANTS

We Are People of Action

Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves.

GUIDING DOCUMENTS

TRF Grant Terms and Conditions

Memorandum of Understanding

District Grant Policies

Guide to Global Grants

Where can you find these?

The Rotary Foundation

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

The Rotary Foundation

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

The Rotary Foundation

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

The Rotary Foundation

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   T
     funds

The Rotary Foundation

FUNDING BASICS

FUNDING BASICS

PolioPlus

Annual Fund

Endowment Fund

3 – Year SHARE

Earnings

Year 1 Gifts

Year 2 Gifts

Year 3 Gifts

Projects

Income helps pay Operating costs

Year 4 Gifts

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+

The **Rotary** Foundation

DISTRICT 5150 FAIR SHARE FUNDING

Fair Share DDF Allocation Calculation

prior 3 years

Club's AF Donations   ÷   Total D5150 AF Donations

= %

X Available District DDF for year

= Club Fair Share DDF

DISTRICT 5150 FAIR SHARE FUNDING

Fair Share DDF Allocation
<u>Hypothetical</u>

$$\frac{\text{2017-2019 Club's AF Donations} \quad \$56,296}{\text{2017-2019 D5150 AF Donations} \quad \$1,050,000}$$
$$= 5.362\%$$

X $305,273 Available DDF 2019-20

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

The Rotary Foundation

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 Rotary Foundation

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

The Rotary Foundation

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

The Rotary Foundation

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

The Rotary Foundation

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
    - 2019-20 Club President and President Elect sign*
    - 2019-20 Club President and one other have attended GMT
    - Be a Club in "Good Standing"

D5150 MOU ADDENDUM

- Clubs must be qualified by April 1, 2019 in order to receive DDF for either a District or Global Grant in 2019-20

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

The Rotary Foundation

TYPES OF GRANTS

ROTARY FOUNDATION GRANTS

- District grants

- Global grants

- Packaged Scholarships

The Rotary Foundation

ROTARY FOUNDATION GRANTS

- District Grants
  - Humanitarian Projects
  - District Scholars
  - Vocational Training Teams
- Global Grants
  - Humanitarian Projects
  - Global Scholars
  - Vocational Training Teams

The Rotary Foundation

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 GRANTS – NEW POSSIBILITIES

- Community Needs Assessment

- Project Fairs

Rotary | UPCOMING PROJECT FAIRS

Africa

> **West Africa**
Cotonou, Benin
3-10 October, 2018

Email Dorothé GOUNON at:
dgounon@gmail.com
www.rotarywapf.org

> **East Africa**
Mombasa, Kenya
2-5 May, 2019

Email Eric Kimani at:
eric@palmhousedairies.com
http://www.rotaryeapf.org

Central and South America

> **District 4400 (Ecuador)**
Manta, Ecuador
19-20 October, 2018

Email Isabel Andrade at:
iandradeortiz@icloud.com
www.rotaryecuador.org

> **Colombia**
Bucaramanga, Colombia
1-3 February, 2019

Email Trevor Edwin Birt at:
trevoredwinbirt@hotmail.com
https://tinyurl.com/colombiafair

Europe

> **Multi-Club Workshop**
Matera, Italy
5-9 September, 2018

Email Leonardo De Angelis at:
deangelisleonardo08@alice.it
www.rotary-mcw.com

Middle East

> **North Africa and Middle East**
Luxor, Egypt
1-3 December, 2018

Email Ayman Helal at:
helal_ayman@yahoo.com
www.rotaryd2451.org/projectfair/index.html

> **Uniendo America**
Costa Rica
24-27 January, 2019

Email Manuel Antonio Sequeira at:
antonio_seq@yahoo.com
https://tinyurl.com/costaricafair

> **Brazil**
Foz do Iguacú, Brazil
22-23 February, 2019

Email Víctor Manuel Báez N at:
baezvic@itacom.com.py
www.fiprt.org

The Rotary Foundation

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

The Rotary Foundation

DISTRICT VOCATIONAL TRAINING TEAMS

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

The Rotary Foundation

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

The Rotary Foundation

GLOBAL GRANTS - PILOT

Low Cost Shelters
Simple Schools

Rotary

CONSTRUCTING SIMPLE SCHOOLS USI...
GRANTS
Guidelines and Application Appendix

SIMPLE SCHOOLS GUIDELINES

Section 1: Program Requirements

1. Simple schools are an extremely limited project type that permits the constr... school buildings (e.g. 2-3 classrooms).

2. Simple schools must be built as a part of a comprehensive project that fits wit... education and literacy area of focus. Providing a school building alone cannot... order to enhance educational outcomes, pedagogical teacher training is require... simple school projects.

3. Only primary schools, secondary schools, and early-childhood education center... mandated government curriculum are eligible for construction. Construction of... colleges, universities, vocational training centers, and community centers is not e... grant funding. Additions to existing schools, such as computer labs or dormitorie... eligible.

Rotary

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... six areas of focus, with sustainable elements and training in the chosen area of focus. This wil... 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 ...training to provide collective...

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 supplem... on global grant scholarships. For information about district grant scholarships, clubs should co... district Rotary Foundation committee, and districts should refer to Lead Your District: Rotary F... 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. key feature of global grants is the partnership between the district or club in the scholar's home country (international sponsor). Both sponsors sponsor) and the district or club in the study location (host 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?

PARAMETERS	DISTRICT GRANT	GLOBAL GRANT
DURATION	1 Year (approx.)	1/ 2+ Years
PURPOSE	HUMANITARIAN PROJECTS SCHOLARSHIPS VOCATIONAL TRAINING TEAMS	HUMANITARIAN PROJECTS SCHOLARSHIPS VOCATIONAL TRAINING TEAMS
AREA OF FOCUS	Not Required by TRF	YES and Within Specific TRF Policy Guidelines
HOST PARTNER	NO	YES
LOCATION	LOCAL OR INTERNATIONAL	INTERNATIONAL
ACTIVE ROTARIAN INVOLVEMENT	YES	YES

The Rotary Foundation

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.

The Rotary Foundation

INVEST IN PEOPLE

MAKE A SUSTAINABLE IMPACT

- Start with the community
- Encourage local ownership
- Provide training
- Buy local
- Find local funding
- Measure your success

The Rotary Foundation

COMMUNITY NEEDS ASSESSMENT – STEP 1

- Examines strengths, weaknesses, needs, assets

- Helps to identify relevant opportunities for projects

The Rotary Foundation

COMMUNITY NEEDS ASSESSMENT

COMMUNITY
ASSESSMENT
TOOLS
A resource for Rotary projects

- Community meeting
- Survey
- Interview
- Focus group
- Asset inventory
- Community mapping

The Rotary Foundation

COMMUNITY NEEDS ASSESSMENT

Rotary

Required for all Global Grants

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

The Rotary Foundation

ASSESSMENT

Community meeting   Focus group
Survey   Asset inventory
Interview   Community mapping

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

The Rotary Foundation

AREAS OF FOCUS

- Promoting Peace

- Fighting Disease

- Providing Clean Water

- Saving Mothers and Children

- Supporting Education

- Growing Local Economies
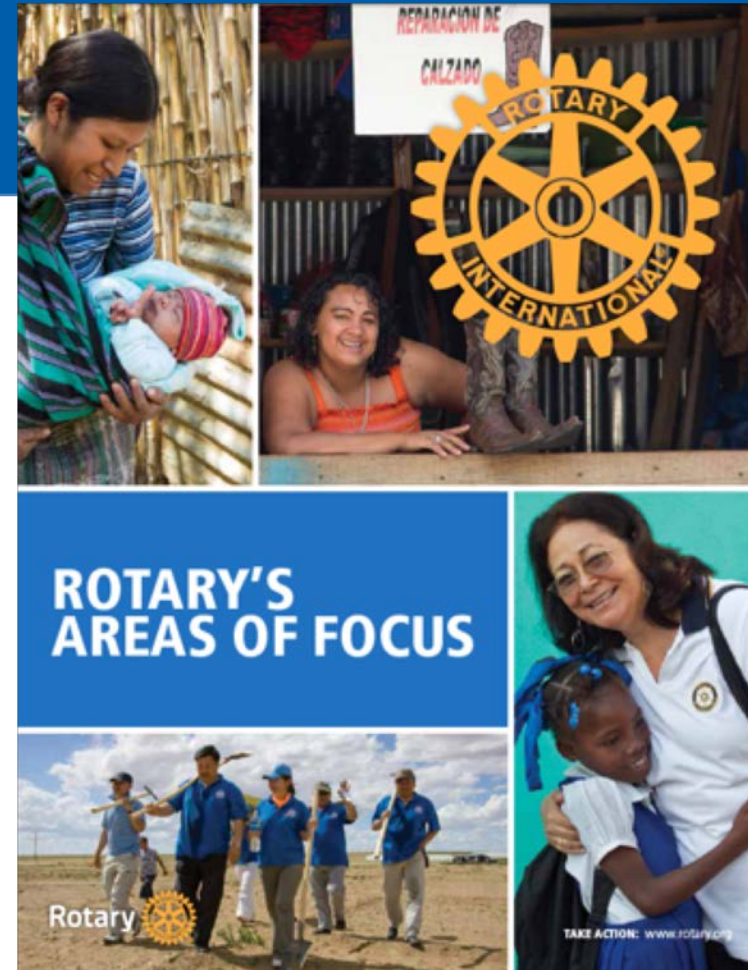
AREAS OF FOCUS – Global Grants

- Review Areas of Focus Policy

- Design project based on Area of Focus

- Ensure project relates to goals of chosen Area(s) of Focus

BUILD CAPACITY – HAND UP NOT HANDOUT

What Makes This Project Sustainable?

The Rotary Foundation

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
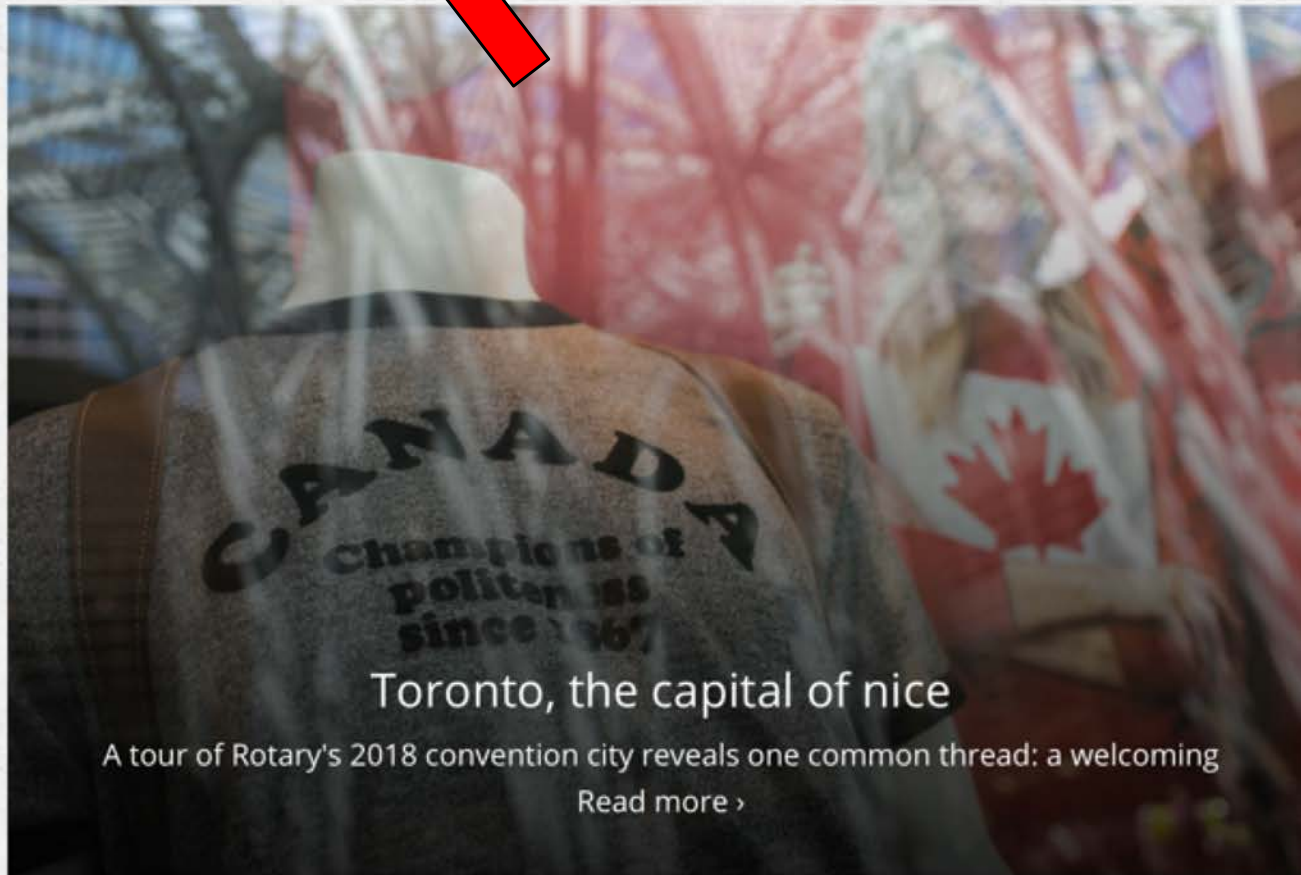
The Rotary Foundation

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

The **Rotary** Foundation

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

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**

The Rotary Foundation

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

The Rotary Foundation

WHO ELSE – COOPERATING ORGANIZATION

Cooperating Organization MOU

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

Rotary

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.

The Rotary Foundation

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

The Rotary Foundation

PLAN YOUR PROJECT

The Rotary Foundation

SUCCESSFUL GRANT PROJECTS

- Address real community needs

- Are sustainable

- Involve participants, partners

- Have a solid plan

- Maintain proper stewardship of funds

The Rotary Foundation

PROJECT LIFECYCLE

GLOBAL GRANT LIFE CYCLE

Application Phase

If application arrives at TRF complete, time from receipt to approval of application is approximately 4 weeks.*

Payment Phase

From time that TRF receives bank account information and contributions, processing of payment takes approximately 2-4 weeks.*

Reporting Phase

Staff review reports in the order in which they are received within 8 weeks of receipt at TRF.*

1 — Grant application submitted online including legal authorization

2 — Staff reviews application

Missing information is supplied to staff

3 — Applications are forwarded for a secondary review**

4 — Sponsors receive notification of approval - announcement letter, and payment instructions

5 — Sponsors provide bank account information and submit contributions

6 — Grant payment is processed. Larger projects are normally paid in installments based on a spending plan.

7 — Sponsors submit progress reports online every twelve months for the life of the grant. Final report is due within two months of project's completion.

8 — Staff reviews report

Missing information is supplied to staff

9 — Projects for which acceptable final reports are received are closed. Closure letter is sent to project partners.

Legend

◯ = Rotarian action

▢ = TRF action

The Rotary Foundation

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)

The Rotary Foundation

SET GOALS / MEASURABLE OUTCOMES

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

BEGIN WITH THE END IN MIND

Rotary

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

The Rotary Foundation

CREATE A BUDGET

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

The Rotary Foundation

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

The Rotary Foundation
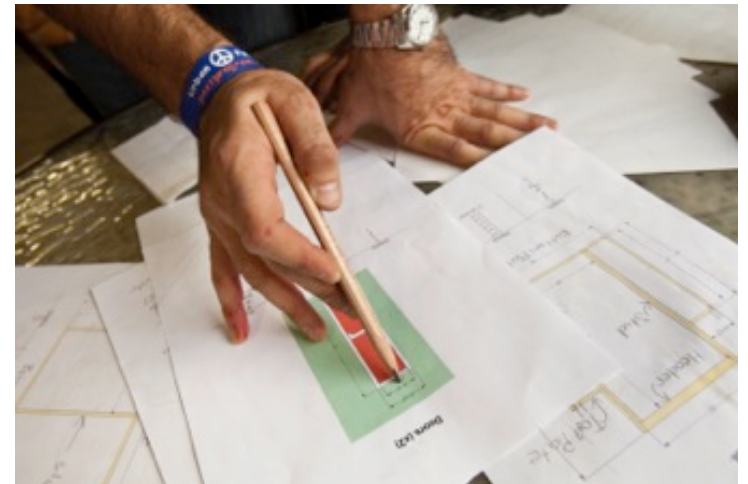
CONFLICT OF INTEREST

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
- **District Grant application** submitted by **June 1, 2019**
- 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

The Rotary Foundation

A GOOD DISTRICT GRANT?

A. Donating $10,000 to the local middle school so they can outfit their computer lab

B. Working with the Senior Citizens League to identify homes that need retrofitting for disabled access and then completing the work with Club members and other professionals

C. Purchasing the decorations and supplies for a fundraiser to support the local high school scholarship program

The Rotary Foundation

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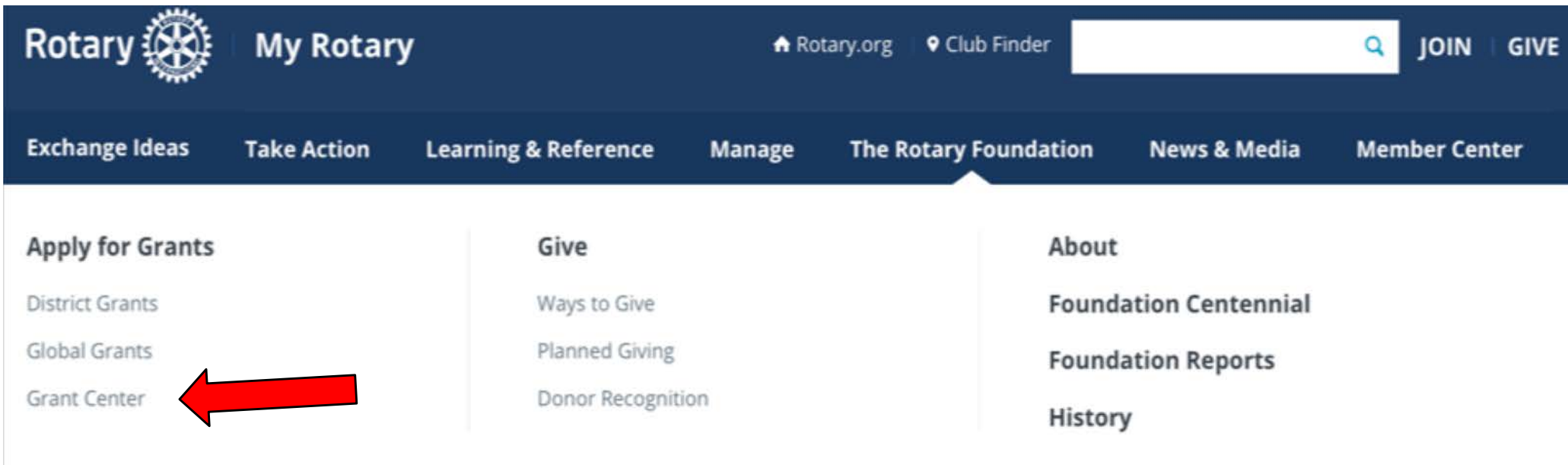
- Sign in to My Rotary
- Select Grant Center from TRF Tab Menu

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

Draft	Authorization	Submitted	Approved	Completion
Rotary members plan a project or scholarship and build their grant application online	Club and district leaders review the application and authorize funding	The grant's planners submit the application to The Rotary Foundation	If the grant is approved, the Foundation issues payment	Members carry out the project, reporting to the Foundation annually until the work or studies are finished and the grant is closed

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
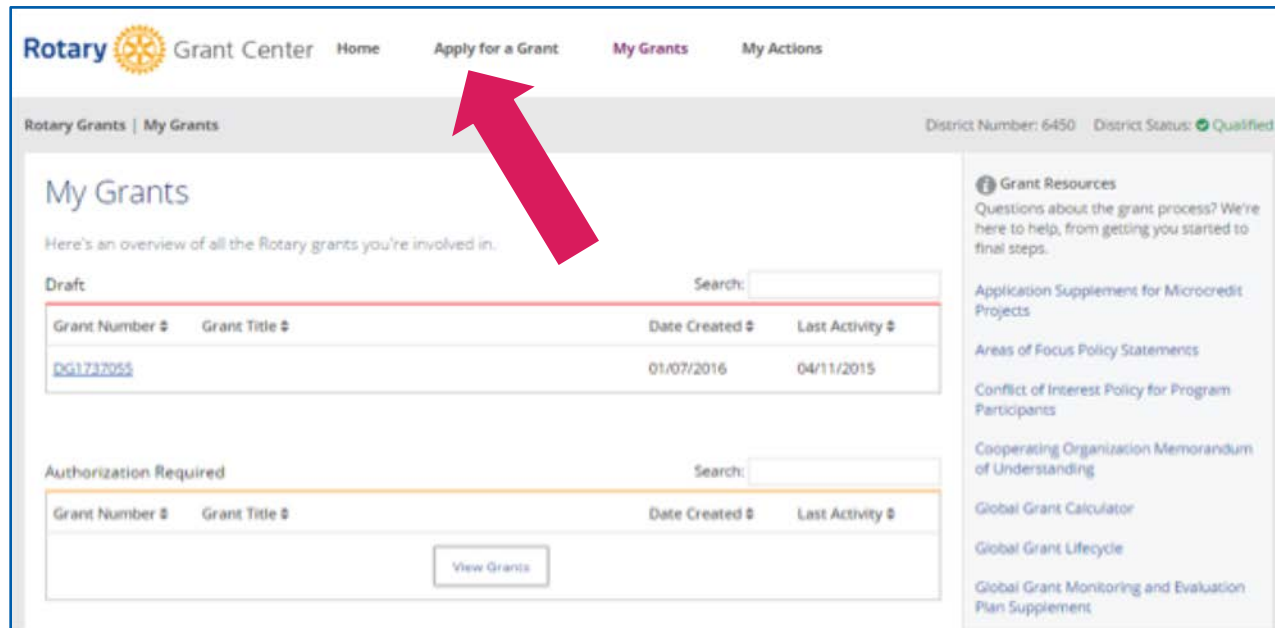
Global Grant Scholarship Supplement

Grant Travel

Guide to Global Grants

Guidelines for Rotary

GLOBAL GRANT FIRST STEPS

APPLICATION

Grant Application

Saving Mothers and Children in Guinea

All fields are required unless noted as "optional".
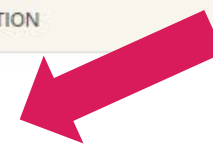
Step 1: Basic Information ✔

Step 2: Committee Members

Who will serve on the grant's Host committee? ⑦

Name	Club	District	Role
+ A			

Who wi

Name
+ Add

Do any

○ No

Save

AUTO-SUBMIT ⑦
◉ 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. ⑦

☐ 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

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
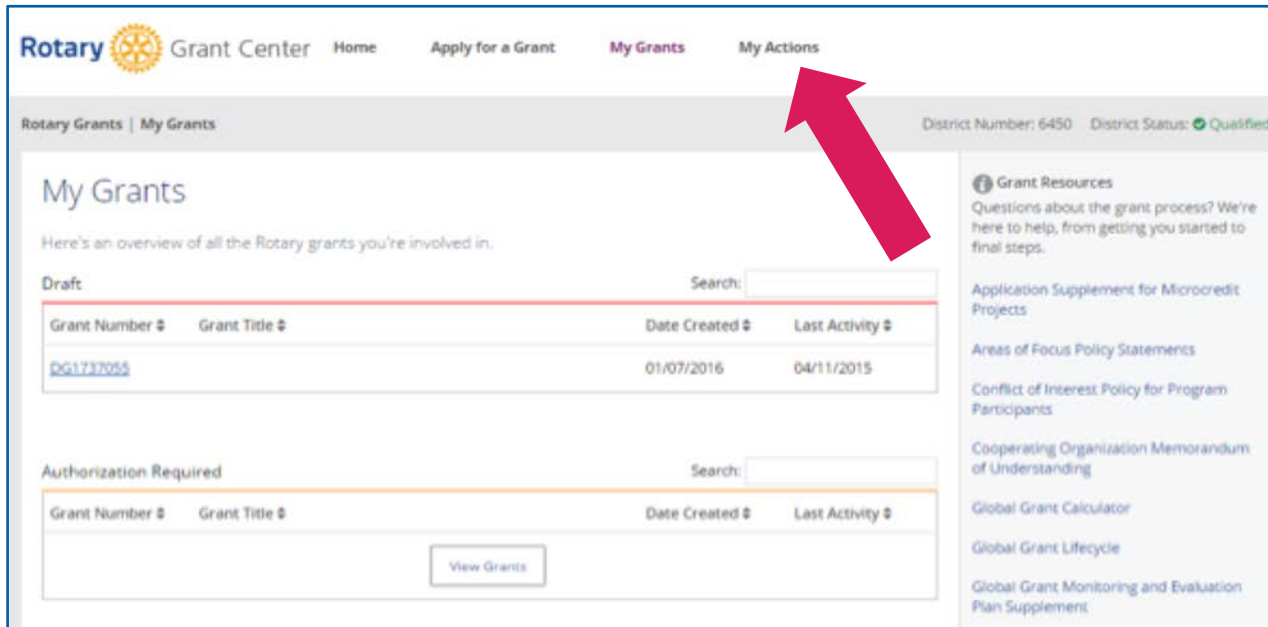
Step 12: Authorizations

GLOBAL GRANT FIRST STEPS

GLOBAL GRANT FIRST STEPS

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

DISTRICT GRANTS – HOW TO APPLY?

Online on District website

IMPLEMENT, MONITOR, EVALUATE

IMPLEMENT AND MONITOR

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

The Rotary Foundation

EVALUATE

Evaluation

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

The Rotary Foundation

REMINDERS

KEEP

- All grant correspondence

- Beneficiary documentation

- Cooperating organization MOUs and memoranda

- Vendor documentation

- Inventory

- Photos of project

REPORT, SHARE, CELEBRATE

REPORTING REQUIREMENTS

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

The Rotary Foundation

DISTRICT GRANT REPORTS

For 2019-20 Grants:

- Submit Final or Interim no later than May 1, 2020

- For projects longer than one year, Final Report no later than May 1, 2021

- Online through District website

- Return unused funds to District

The Rotary Foundation

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

The Rotary Foundation

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

The Rotary Foundation

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

The Rotary Foundation

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

The Rotary Foundation

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

- Colleagues

ZONE GRANT MANAGEMENT VIDEOS

www.zone2526.org

Rotary
Zones 25 & 26

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 2019-20

Congratulations!

Thank You!

The Rotary Foundation