

DOING GOOD IN THE WORLD

From Foundation Walk to Grants

2021-2022 D7070 Qualification Seminar

Module 1 – The Rotary Foundation

Module 2 – Global Grants

Module 3 – District Grants

Rotary





THE FOUNDATION'S MISSION



Advance World Understanding, Goodwill & Peace through the improvements of health, the support of education , and the elevation of poverty

Rotary



ROTARY & THE ROTARY FOUNDATION



TOGETHER, WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING
CHANGE ACROSS THE GLOBE ,
IN OUR COMMUNITIES , AND IN OURSELVES
Rotary Vision Statement

The Rotary Foundation is the perfect tool to fulfill Rotary's Vision Statement

- Increase our impact
 - The grants program opens up many opportunities to take action
- Expand our reach
 - There are opportunities to do good in new forms and at new locations, but also possible to identify new donors
- Enhance participant engagement
 - Encourage Rotarians and Rotaractors to become actively involved in Foundation activities, from fund-raising to project implementation
- Increase our ability to adapt
 - The last year has shown how Rotarians and the Rotary Foundation can adapt to new realities

THE ROTARY FOUNDATION – A BRIEF HISTORY

The Rotary Foundation transforms your gifts into service projects that change lives both close to home and around the world.

- ❖ In 1917, Rotary President Arch Klumph proposes the establishment of an endowment for doing good at the Rotary Convention. First contribution, \$26.50 from the Rotary Club of Kansas City, Missouri
- ❖ In 1930, \$500 is awarded to the International Society for the Crippled Children (polio)
- ❖ In 1947, Rotarians contribute \$1.3 million in Paul Harris's memory
- ❖ Paul Harris Fellow recognition is introduced in 1957
- ❖ In 1963, the Matching Grants program is introduced, launched in 1965
- ❖ In 1967, 3H – Health, Hunger, Humanity – grants expand service
- ❖ In 1985, the PolioPlus program is launched
- ❖ In 2007, The Bill & Melinda Gates Foundation first contribution (\$100 million) to PolioPlus
- ❖ The current Global & District Grants model is introduced to all Districts in 2013

During the past 100 years, the Foundation has spent \$3 billion on life-changing, sustainable projects. With your help, we can make lives better in your community and around the world



THE ROTARY FOUNDATION'S THREE FUNDS

Donations to The Rotary Foundation can be directed to one of the following three funds

❖ **Endowment Fund**

- ❖ Ensures long-term stability of the Foundation's grants and programs
- ❖ Contributions DO NOT qualify for Paul Harris recognition

❖ **Annual Fund**

- ❖ Primary source of funding for TRF's local and international grants and programs
- ❖ Contributions qualify for Paul Harris recognition

❖ **PolioPlus Fund**

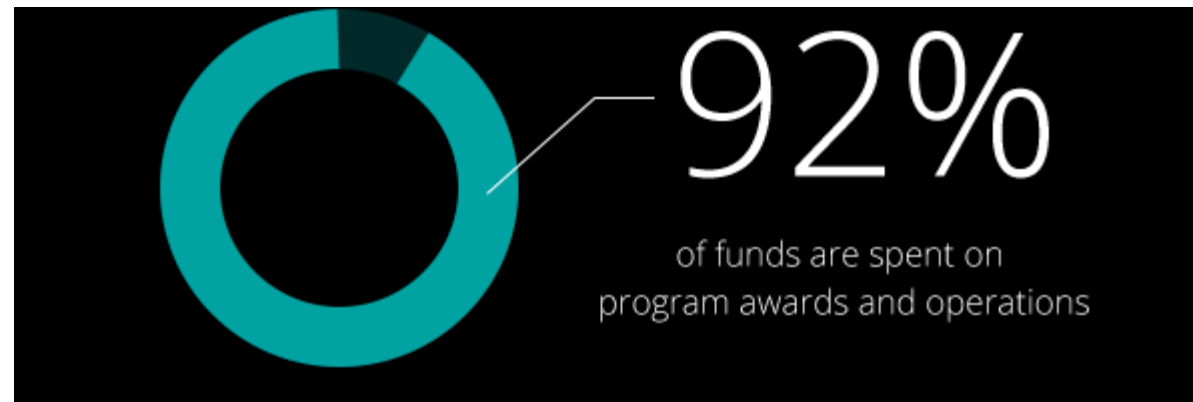
- ❖ Contributions are used for the End Polio Now campaign
- ❖ Contributions qualify for Paul Harris recognition

THE ROTARY FOUNDATION – HIGHLY REGARDED



Four Stars
out of Four

> 90 % are
spent on
programs



Donate with Confidence!!!

WHAT IS THE IMPACT OF DONATING?



Any gift can be donated to a specific fund – End Polio Now, an individual global grant, or one of Rotary's areas of focus.

Illustrations by Gwen Kereval

- For as little as 60 cents, a child can be protected from polio.
- \$50 can provide clean water to help fight waterborne illness.
- \$500 can launch an antibullying campaign and create a safe environment for children.

(US currency)

DONOR RECOGNITION – INDIVIDUALS

The generous contributions by you and others to the Rotary Foundation are essential in securing and growing Rotary programs throughout the world and are recognized by TRF

- ❖ **Rotary Foundation Sustainable Member**, min \$100 per year
- ❖ **Benefactor**; min. \$1,000 in cash or estate planning to the Endowment Fund
- ❖ **Paul Harris Fellow**; \$1,000 donated to the Annual Fund or PolioPlus
- ❖ **Multiple Paul Harris Fellow**; every additional \$1,000 donated to the Annual Fund or PolioPlus
- ❖ **Paul Harris Society Member**; when you donate min. \$1,000 every year to the Annual Fund or PolioPlus
- ❖ **Bequest Society**; when you donate \$10,000 or more through your estate planning. (10 levels)
- ❖ **Major Donor**; when your cumulative donations reach \$10,000 (4 levels)
- ❖ **Arch Klumph Society**; when your cumulative donations reach \$250,000 (6 levels)

For more information, please visit <https://www.rotary.org/en/donate/recognition>



DONOR RECOGNITION - CLUBS

The Rotary Clubs are very important in motivating members to donate to The Rotary Foundation. Therefore, TRF has also introduced a number of Club recognitions.

- ❖ **100% Paul Harris Fellow Club**; all dues-paying members are Paul Harris Fellows
- ❖ **100% Paul Harris Society Club**; clubs where every dues-paying member contribute min. \$1,000 per year to the Annual Fund or PolioPlus
- ❖ **100% Foundation Giving Club**; clubs with an average giving during a Rotary year to TRF funds of min. \$100 per member, 100% participation of dues-paying members and a min. \$25 from members
- ❖ **Every Rotarian Every Year Club**; clubs that during a Rotary year give an average of at least \$100 per member to the Annual Fund or PolioPlus and every dues-paying member donating at least \$25 during the Rotary year
- ❖ **Top Three Per Capita in Annual Fund Giving**; the three Clubs in each District that give most per capita giving to the Annual Fund during a Rotary year are recognized with a banner. Only Clubs with an average donation of \$50 per capita are eligible.

For more information, please visit <https://www.rotary.org/en/donate/recognition>

ACTIVITIES/PROGRAMS OF THE FOUNDATION

The Rotary Foundation is spending funds on three different programs

❖ PolioPlus

- From 350,000 cases (120+ countries) in 1985 to <50 (2 countries) in 2021
- Rotary has contributed >USD1.6 billion & a huge number of volunteer hours
- Works with WHO, CDC, UNICEF, Gates Foundation & governments
- Funded by PolioPlus fund & DDF

❖ Rotary Peace Fellowships

- Graduate degree in international relations, peace, conflict resolution at six universities around the world
- Districts nominate by July 1 for worldwide competition
- Funded by DDF, Endowment Fund & World Fund

❖ Grants

- District Grants & Global Grants (Humanitarian, VTT & Scholarships)
- Funded by DDF & World Fund

WHO CAN PARTICIPATE IN THE GRANTS PROGRAM?

The Rotary Foundation requires that Clubs that want to participate in the Grants program, must

- have min. 2 members complete the District's Qualification Training (the three on-line modules represent the training), &
- sign a Memorandum Of Understanding (MOU), found on the District website. (President & President-Elect)

The Certification is valid for One Year. The Club as a whole is responsible once qualified, not just the 2 members taking the training.



As of July 1, 2022, Rotaract Clubs will also be able to participate in the Grants Program. However, invite them to participate in Foundation activities already now! So, they are prepared!

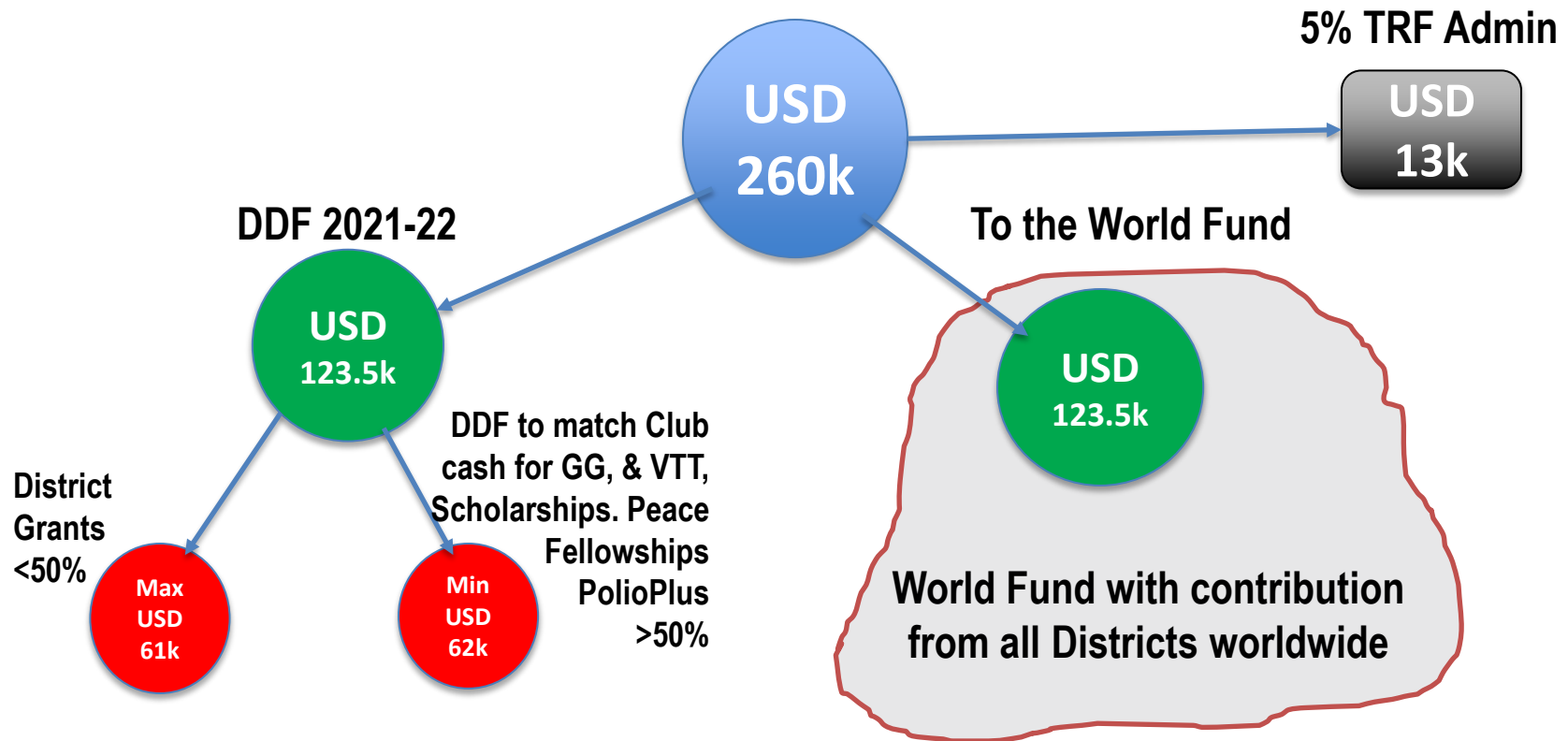
THE MOU – A CRUCIAL PART OF GRANTS PROCESS

The MOU is an important document, covering the following

- ❖ Terms of Club Qualification
 - ❖ For one year; The Club in its entity responsible for the Grant
- ❖ Club Leadership Responsibilities for Qualification
 - ❖ A Club member to be appointed in charge of Grant management; 2 members must take training
- ❖ Financial Management
 - ❖ For Global Grants, a separate bank account is required; funds can only be used for project activities; two Club members required for signing cheques; receipts and book-keeping a must
- ❖ Document Retention
 - ❖ Keep documents in a safe – and known – place for at least 5 years
- ❖ Report on Use of Grant Funds
 - ❖ Progress reports each 12th month; Final report max. 2 months after project completion
- ❖ Method for Reporting and Resolving Misuse of Grant Funds
 - ❖ Club must report any potential misuse or irregularities of funds to District Governor
- ❖ Authorization and Agreement
 - ❖ Signed by President and President Elect

THE SHARE SYSTEM – ANNUAL FUND

Funds raised by D7070 in 2018-19



As of July 1, 2021, 5% TRF Admin fee will be taken off first. The rest is split 50/50 between DDF to the Districts and the World Fund

GLOBAL vs. DISTRICT GRANTS

Global Grants

- Long-term
- Administered by TRF
- Application/reporting on-line at Rotary's Grant Centre
- Applications anytime in the year
- Must relate to one or more of the seven areas of focus
- Must be sponsored by one Host Club/District where the project takes place; one International Club/District outside that area
- Budget >USD30,000
- Humanitarian Projects, VTT & Graduate level Scholarships

District Grants

- Short-medium term
- Administered by the District
- Must support The Rotary Foundation's mission
- Clubs apply to the District
- Can be used for local and international projects
- Can also be used for projects in areas with no Rotary Clubs
- No minimum budget amount
- Districts are free to develop their own policies, procedures & rules, such as the May 31, 2021 dead-line for applications & matching policy

SEVEN AREAS OF FOCUS FOR GLOBAL GRANTS



Basic
Education
& Literacy



Maternal &
Child
Health



Peace &
Conflict
Prevention/
Resolution



Disease
Prevention
&
Treatment



Water,
Sanitation
& Hygiene



Community &
Economic
Development

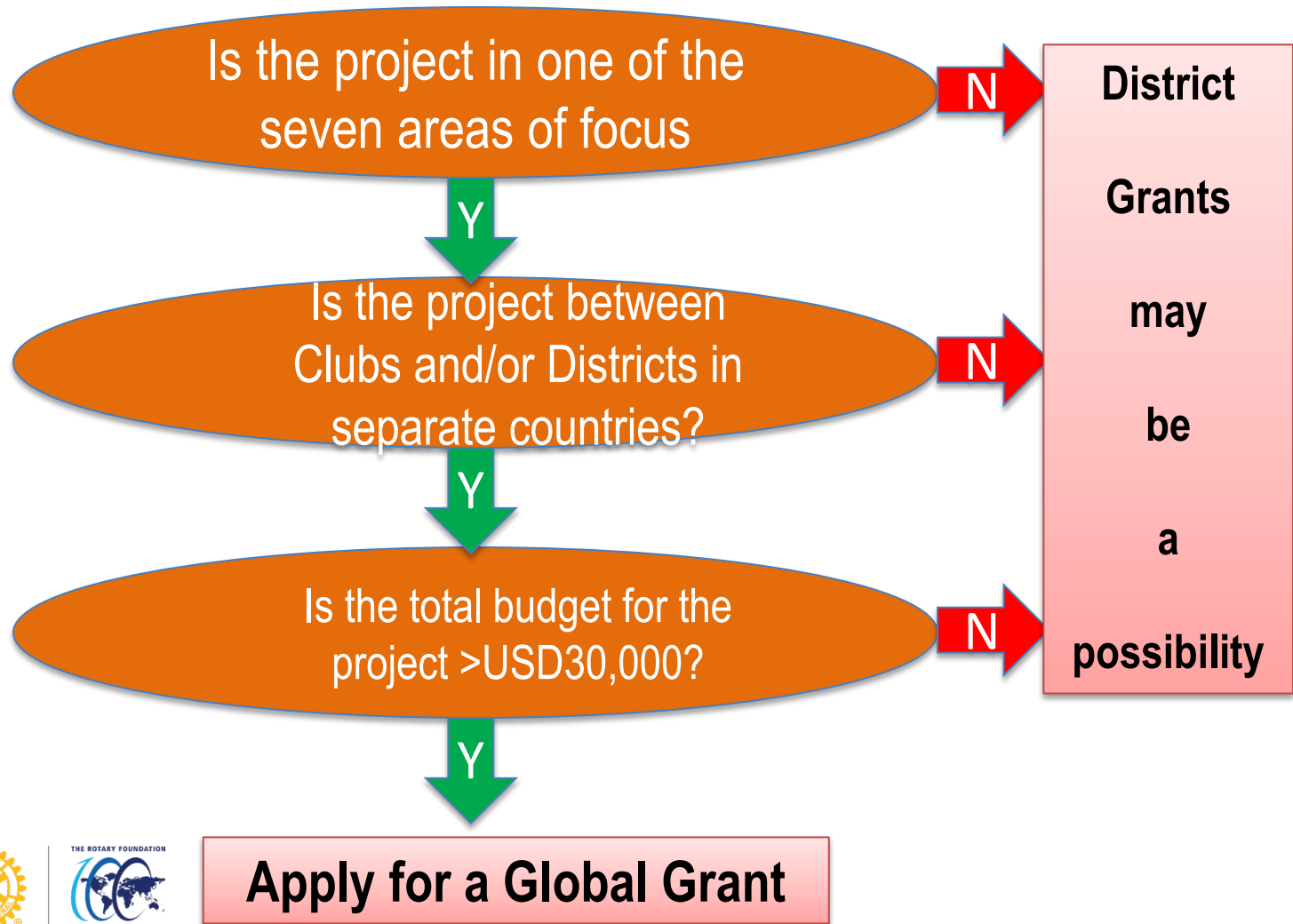


Support the
Environment

- ❖ Basic Education & Literacy
- ❖ Maternal & Child Health
- ❖ Peace & Conflict Prevention/Resolution
- ❖ Disease Prevention & Treatment
- ❖ Water, Sanitation & Hygiene
- ❖ Community & Economic Development
- ❖ Support the Environment (***New for the 2021-22 Rotary year***)

GLOBAL or DISTRICT GRANT?

- **Three simple questions to ask**



GLOBAL GRANT CYCLE



Draft

Rotary members plan a project or scholarship and build their grant application online

Talk to district leaders about potential DDF for the project.

Authorization

Club and district leaders review the application and authorize funding

Submitted

The grant's planners submit the application to The Rotary Foundation

Approved

If the grant is approved, the Foundation issues payment

Completion

Members carry out the project, reporting to the Foundation annually until the work or studies are finished and the grant is closed
Meet reporting dead-lines

SUSTAINABILITY KEY FOR GLOBAL GRANT PROJECTS

Rotary Foundation definition of sustainability:

Providing solutions to community needs in such a way that the benefiting community can maintain the activities after grant funding ends

- Community needs
 - N.B. A Community Needs Assessment is mandatory for a Global Grant application***
- Appropriate technology
- Sustainable funding
- Knowledge transfer
- Motivation
- Monitoring and evaluation



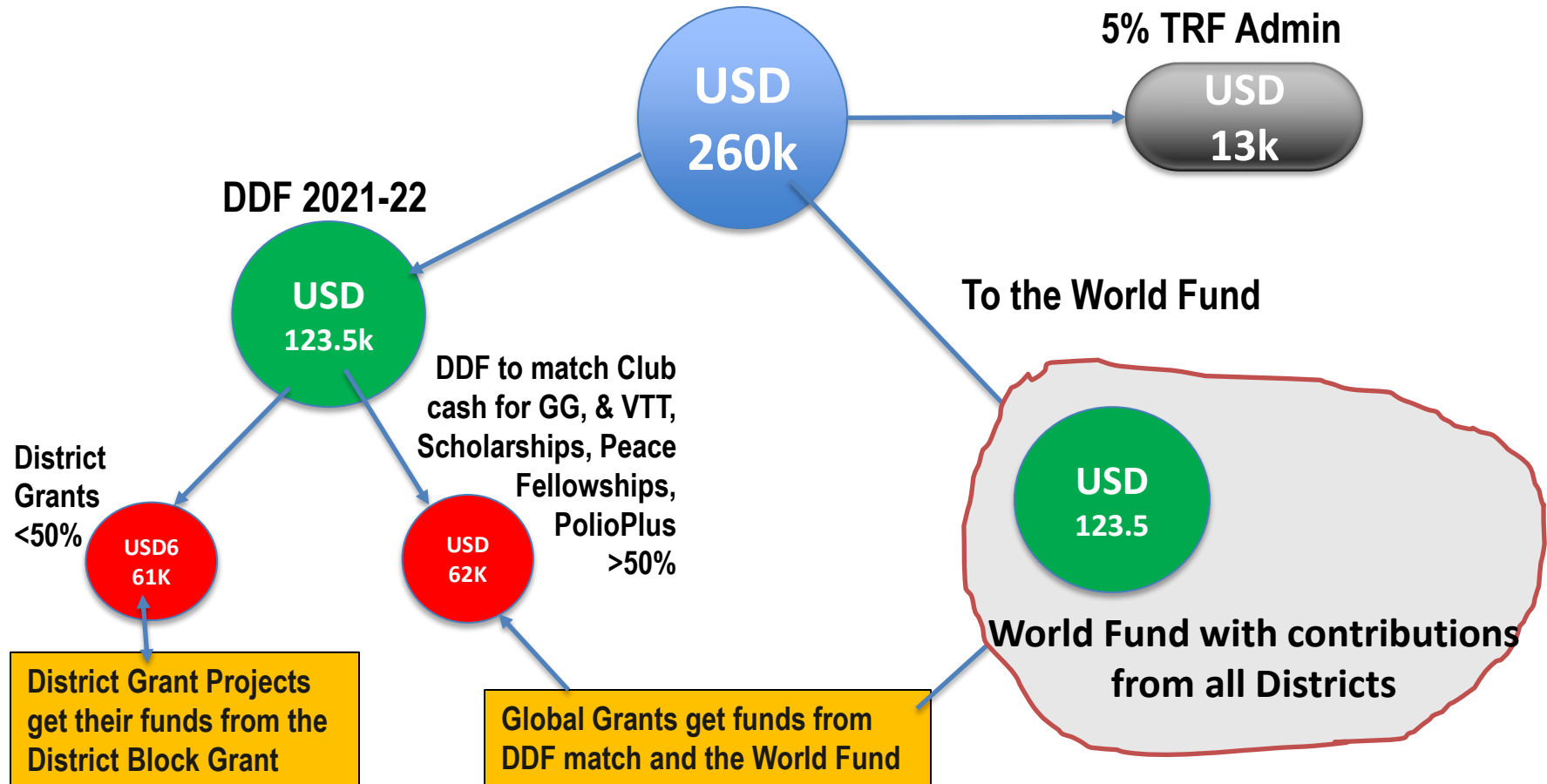
STEWARDSHIP – IT IS HARD EARNED MONEY

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

- Rotarian supervision, e.g. three member committee
- Financial records review, e.g. book-keeping, storage of documents
- Oversight of funds, e.g. separate project bank account
- Reporting irregularities, e.g. conflict of interest, funds can't come from beneficiaries nor other grants
- Timely submission of reports
- Follow local laws

SO HOW ARE THE ANNUAL FUND CONNECTIONS?

Funds raised by D7070 in 2018-19



POSSIBLE USE OF D7070 DDF (USD123K) IN 2021-22

D7070 will receive estimated 'new' USD123,000 of DDF for the Rotary year 2021-22. A potential allocation of those finds is

❖ District Grants	USD40,000
❖ Polio Plus (20%)	USD27,500
❖ Graduate Scholarship	USD17,500
❖ Global Grant matching of Club funds	USD35,000
❖ Misc.	USD 3,000

In addition, there will be some funds carried over from previous year. Most likely, the District will have a total of circa USD175,000 to use for various projects in the 2021-22 Rotary year.

DDF MATCHING OF CLUB CASH FOR GLOBAL GRANTS

- Districts decide how DDF is allocated to projects
- D7070 has the following rules for matching Club cash in Global Grant projects
 - Club cash may be matched 1:1 up to \$5,000 per Club and project
- Each Global Grant project will require some DDF as The Rotary Foundation is only matching DDF (80%)
- Only cash contributions from Clubs in D7070 will be matched
- Cash contributions by D7070 Clubs to Global Grant projects in other Districts may be matched.

YOUR CLUB IS QUALIFIED – *once ...*



- ...
- at least two Club members have completed the on-line Grant Qualification Training for the Rotary year 2021 – 22, and
 - your Club has signed the MOU
 - Record of qualified Clubs will be kept on the District's website

For more information:
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Thank You

