

Foundation Grants

Virtual Seminar
May 30, 2020

PDG Margaret Walton
District Foundation Chair
Rotary District 7010

What is The Rotary Foundation?



- The Rotary Foundation (TRF) is a Not for Profit corporation.
- TRF is independent of Rotary International and is run by a separate Board of Trustees.
- TRF Funds all the humanitarian work of Rotary beyond the club.
- TRF is entirely funded by donations (not from District dues or RI dues).
- All donations for Canadian clubs are through TRF (Canada).

Why is it important?

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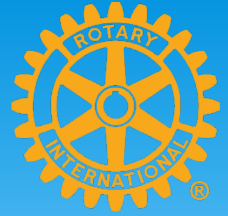


The Rotary Foundation and Foundation grant-making is the backbone of how Rotary does humanitarian work locally and across the globe.

- Completion of and Rotarian participation in grants puts a “face” on the work of Rotary and The Rotary Foundation.
- Service is one of the most important aspects of why people join and stay in Rotary.
- Involvement in grants has been shown to increase Club participation and feeds into increased Foundation giving.

What is District DDF?

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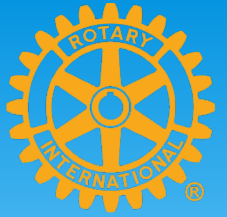


District Designated Funds: Half the monies Rotarians in the District donate to the World Fund (via Annual Giving) are tallied and “come back” to the District three years later to be spent DIRECTLY by the District. The other half funds RI contributions to global grants and other Rotary Foundation programs.

The money that is spent directly is called “DDF” or “District Designated Funds.”

Who Decides How DDF is Spent?

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The decision of how DDF is spent is made by the District Governor and the District Foundation Chair, in consultation with the District Executive and Foundation committees.

Rotary International will also contact the District to ask about donations to various areas (e.g. Polio).

Decisions on global grants are made by the District Governor in consultation with the District Executive and the Foundation Committee.

Let's Talk about Foundation Grants

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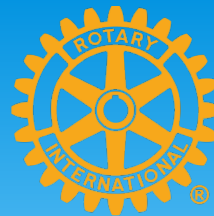
There are two kinds of Rotary Foundation Grants funded by DDF:

- **District Grants.** Based on the District's previous level of giving to The Rotary Foundation, a block of money is made available for clubs to spend to fulfill humanitarian needs.
- **Global Grants.** These humanitarian grants represent a partnership between two Rotary clubs in two countries/districts. Club cash is "matched" by the District and "matched" again by The Rotary Foundation to fund these grants.

You will learn more about each of these Grant types in future modules.

Disaster Response Grants

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- ❖ Districts that have been affected by natural disasters can use Rotary disaster response grants to launch their own projects or work with established relief organizations to help their communities recover. Grant funds can be used to provide basic items such as water, food, medicine, and clothing. Grant funds can also be used to support COVID-19 activities.
- ❖ Districts in an affected area or country may apply for a maximum grant of \$25,000, based on the availability of funds. A district may apply for subsequent grants after it successfully reports outcomes from previous grants. Districts may receive no more than one disaster response grant to support COVID-19 activities. District work with clubs to distribute the funds where they are needed most.
- ❖ Rotary disaster response grants are funded by contributions made to the Rotary Disaster Response Fund.

District and Global Grants:

How does my club “qualify” to participate?



Each year, District 7010 requires each club to “qualify” by doing six things:

- One member must complete Grants training. Although one person is required by RI, two people are strongly recommended.
- Appoint Club Foundation Chair and input his/her name into Rotary Club Central and Clubrunner.
- Establish a goal to support Annual Fund and Polio Eradication on Rotary Club Central.
- Club President and President Elect sign and implement the Club Memorandum of Understanding (MOU).
- Be current with District and RI dues.
- Be current with all District and Rotary Foundation grants (reports and closeout).

District and Global Grants:

How does my club maintain its qualification?



Each year, District 7010 requires each club involved in writing Grants to

- Follow the terms of the MOU.*
- Appoint a club member/committee to manage club qualifications.
- Fully implement stewardship practices to prevent misuse of funds.
- Ensure that all reporting is done in a timely manner and detailed fashion.

* Located on the District website under Resources/Tools > Foundation Grants Certification Training.



District Grants

Kim Giffen

District Grant Chair 2017-2020

Steve Wallace

District Grant Chair 2020-2023

Objectives of this Module

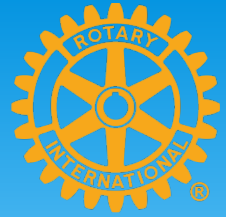
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1. Learn how your Club can “qualify” to apply for a Rotary Foundation District grant.
2. Learn when and how to apply.
3. Learn how your Grant application will be evaluated.
4. Learn reporting and financial requirements.

Examples of District Grants

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- Provide accessible playground equipment in your community
- Building a toilet block in a primary school in the Dominican Republic
- accessible playground equipment
- Contribute to a Salvation Army van (Note: this is a local project in our district and the van cannot belong to Rotary)
- Purchase supplies to refurbish a room in a woman's shelter

How to “Qualify” for a Rotary Grant

Annually, your Club must do six things!

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1. A minimum of one or two members ANUALLY must take grant training.
2. Club must appoint a club Foundation chair and record the name on Clubrunner and Rotary Club Central
3. Club must establish a goal to support the Annual Fund on rotary.org's Rotary Club Central (ask your Assistant Governor if you are unclear about this)
4. Club President and president-elect must sign and implement the MOU
5. Club must be current with all District and RI dues
6. Club must be current with all Rotary Foundation grant reporting

How to Apply for a District Grant

Basic rules of engagement:

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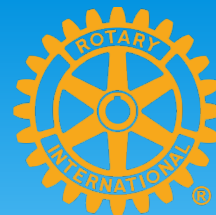


1. The Club must be “qualified” (*as described on previous slide*).
2. Project must adhere to the Terms and Conditions for Rotary Foundation Grants (*this document available on District website*).
3. Project must be consistent with one of Rotary’s six Areas of Focus. (*These are: Basic Education & Literacy; Maternal & Child Health; Disease Prevention and Treatment; Water, Sanitation & Hygiene; Community Economic Development; and Peacebuilding & Conflict Resolution.*)
4. Projects must demonstrate active Rotary involvement and must be Rotary led.
5. Club must contribute minimum 1/3 in club cash to the project.
for example if you apply for 3000.00 your club will contribute
6. Each club may submit only two District Grant applications per year. Please indicate which is priority.

How to Apply for a District Grant

Your application will be evaluated on:

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1. The quality of the project, its positive impact on a local or international community, and the number of people benefiting from the project must be effectively demonstrated.
2. Project must lead to sustainability and be meaningful to the community that it is intended to benefit.
3. Application must include a detailed promotional/PR plan and a balanced budget in enough detail that the District Grant Subcommittee Chair can understand it.
4. The limit to apply for the same project is two times unless rationale can be provided as to why the project is different.

How to Apply for a District Grant

Special Rules for International Travel:

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Travel costs may be considered as a part of the grant application, provided that:

1. The traveler(s) have special expertise directly related to the targeted Area of Focus.
2. Travel is permitted by the current travel policies of The Rotary Foundation (detailed on the website).
3. Tickets are purchased through Rotary International Travel Service (RITS).

How to Apply for a District Grant

Who makes the decisions?

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1. The applications are judged by the District Grant Subcommittee chaired by Steve Wallace. This committee has a membership of three to four club Rotarians versed in grants.
2. If approved by the District Grant Subcommittee the grant goes to RI for review and final final approval.
3. District grants are sent to RI as one grant therefore all clubs must adhere to deadlines or the entire grant for all clubs is delayed.

How to Apply for a District Grant

Deadlines and Calendar

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1. Application must be complete, signed, and received by the District Grants Coordinator no later than the deadline of **June 30, 2020**.
2. Clubs will be notified of decision by **September 1, 2020**.

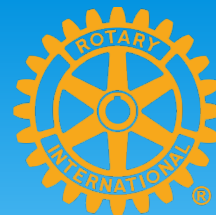
A final report of each Grant is required!

All projects **must** be complete and final report received by the District Grant Subcommittee Chair on or before **May 30, 2021**.

How to Administer a District Grant

Stewardship and Closeout

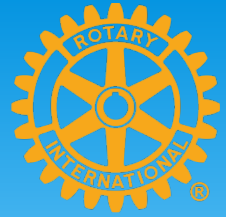
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Stewardship is the responsible management and oversight of Foundation funds, including:

1. Supervision of Rotarians involved with handling of funds.
2. Review of financial records and oversight of funds. (*The District will maintain records for five years, but it is recommended that the Club maintain all records as well.*)
3. Oversight of funds. (*These funds were donated for humanitarian purposes and must be treated appropriately.*)
4. Reporting any irregularities. (*A conflict of interest exists when a Rotarian benefits financially or personally from the grant.*)
5. District 7010 has a stewardship committee which provides oversight to the use of Foundation funds.

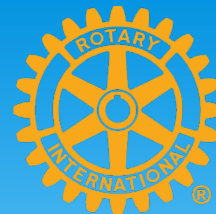
Next steps



- * Now that you are done the modules for certification please go to the district website under [resources/tools](#), then [Foundation resources/tools](#) and complete the district grant questionnaire.
- * While you are there print off the MOU and have it signed by your current President and President-Elect. Please indicate your club name on the form.
- * Scan both and email them to: PDG Margaret Walton
 - * mwalton7010dg16.17@gmail.com

Resources

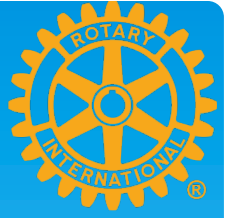
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PDG Margaret Walton
District Foundation Chair
mwalton7010dg16.17@gmail.com

Steve Wallace
District Grants Chair 2020-2023
steve.wallace@rogers.com

Kim Giffen
District Grants Chair 2017-2020
kmgiffen3@gmail.com



Global Grants

PDG Dawn Straka
Global Grants Subcommittee Chair

Rotary District 7010

What is a Global Grant?



- Global Grants are long-term projects with sustainable, measurable outcomes.
- Global Grants must align with one of Rotary's six Areas of Focus.
- Global Grants represent a multiple-year partnership between two Rotary Clubs in two different countries.
- Global Grants must start with a **community assessment**, must make a **sustainable difference**, and that difference must be **measurable**.
- Global Grants must actively involve Rotarians and community members.
- Global Grants must be at least \$30,000 in size, of which \$15,000 is requested by The Rotary Foundation.
- Global Grants must meet the TRF Terms and Conditions for grants.

How to get started

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1. Build a relationship with a Rotary Club in the country and District of your proposed project. The success of your project will hinge on this relationship.
2. Be sure that both your Club and the in-country host Club are “qualified” (see slide # 5).
3. Make sure that your proposed project falls within the eligibility requirements of the appropriate Area of Focus.
4. Understand the financial obligations of a Global Grant.
5. Submit a notice of intent to apply to the Global Grants Chair briefly outlining the purpose of the project. You will be contacted to confirm details before proceeding.

How to get Started continued



6. Download the Guide to Global Grants and other materials designed to help you successfully complete your grant at rotary.org in the Grant Center.
7. Know that there is always the option to pay for travel for someone who has the required expertise to justify the project or to conduct an assessment.
8. Contact the Global Grants Chair, Dawn Straka, to discuss your wish to do a Global Grant application.

The Global Grant Committee will help you write your grant!

Global Grant Requirements: Community Needs Assessment

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1. **Start with a community needs assessment*** rather than a **project plan!** Talk to everyone, use local knowledge and available human assets, think long term. *Don't assume the solution until you've figured out the problem!*
2. **Remember that cultural biases may color your assessment.**
3. **Make sure your needs assessment includes baseline metrics, so that later evaluation is possible.**
4. **Your solution must be impactful and solve the problem, not just chip away at it.**

* Find the *Community Needs Assessment* form on the District website under Resources/Tools > Foundation Grants Certification Training.

Global Grant Requirements:

Be sure your project is Sustainable

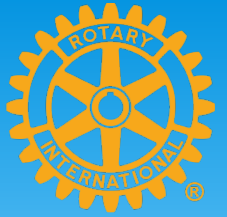


To test the sustainability of your project, ask yourself: *What will happen to the project after the Rotarians go away?* Sustainable projects all display the following characteristics:

1. Community needs and strengths: Projects involve collaboration from multiple participants.
2. Materials and Technology: Projects use material that is locally sourced and can be replaced.
3. Funding: Projects ensure that the project will continue after the Grants funding is expended.
4. Knowledge: Projects involve skills transfer so that local people can continue the project after the Rotarians go away.
5. Motivation: Projects provide incentives for local ownership.

Global Grant Requirements: Monitoring and Evaluation

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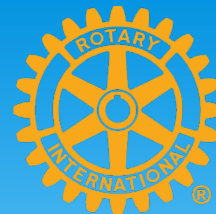
Your project must have clear and measurable outcomes, and those outcomes must be tied to the *Community Needs Assessment* that started off the project. Be sure you:

- Establish clear project goals and relevant baseline data.
- Identify critical project measures and the method for collecting this information.

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District 7010 Resources

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PDG Margaret Walton, District 7010

Rotary Foundation Chair mwalton7010dg16.17@gmail.com

Subcommittees:

District Grant Chair: Steve Wallace steve.wallace@rogers.com

Global Grant Chair: PDG Dawn Straka straka@nexicom.net

Scholarship Chair: PDG Sue Davidson susanmdavidson77@gmail.com

Funding Committee Chair: Drew Markham drwolverine@gmail.com

Polio Eradication Chair: PDG Brian Menton brian@bdinukshuk.ca

Peace Chair: Dr. Richard Denton rdenton@nosm.ca

*Please address all your questions to
the Rotarians listed above.*

