

## Getting a grant from the District or the Rotary Foundation

There are two types of funding available from the Rotary Foundation- one directly from the District and one from Rotary Foundation.

**District grants** fund smaller-scale, short-term projects that address immediate needs in your community or abroad. **Global grants** support large, international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus. They range from \$30,000 to 400,000.

Sadly, District 7490 is one of the lowest in the world in giving to the Rotary Foundation (usually through purchase of Paul Harris Fellowships or in direct donations). Rotary will designate 50% of whatever funds were collected from our District three years ago and give that back to the district to offer grants for both local and international projects. 50% of that is used for local projects or less-expensive global projects; 50% of that is designated to offer clubs funding for larger international projects.

### Table of Contents

District Designated Fund – Club Grants.....	page 2
1. <b>What they may be used for</b> .....	page 2
2. <b>Miscellaneous items</b> .....	page 2
3. <b>Evaluation of Application</b>	
4. <b>Timing</b> .....	page 4
5. <b>What will be on the form?</b> .....	page 4
6. <b>How do you apply for this type of grant?</b> .....	page 4
 Global Grants.....	page 5
• <b>How to Prepare in Advance Before You Even Start</b> .....	page 5
• <b>How to <i>find</i> an international project</b> .....	page 6
• <b>What are the basics of a Global grant?</b> .....	page 7
• <b>Fund-raising for your projects other than through the Rotary Foundation</b> ....	page 10
• <b>The lifecycle of a Rotary grant (flow chart)</b> .....	page 10
• <b>Okay, we're all set to apply. What do we do next?</b> .....	page 9

## **District Designated Fund – Club Grants**

Each year a District has the ability to receive one District Grant funded by up to 25% of a District's contribution to the Annual Fund from three years prior, for use for either District or Club projects. Our District has elected to take the maximum amount allowed each year. The funds are, for the most part, used by the clubs for their projects. Grants are normally in the \$1,000 - \$3,000 range.

### **What they may be used for:**

- Humanitarian Project, Service Travel, Disaster Relief
- Scholarships at any level
- Youth Programs
- Vocational Service Teams
- Clubs are free to customize their projects

### **Miscellaneous Items**

- Grants do not have to be matched, though the committee likes to see participation by the club either in manpower and/or financial
- The project does not have to fall within one of the Seven Areas of Focus, though the committee does like to see that it does
- Clubs do not have to attend a Grant Management Seminar to be Qualified, the District Leadership does (DG, DGE, DGN & DRFC)
- Clubs must sign a Memorandum of Understanding with the District, the District signs a MOU with the Foundation
- Projects must be completed within two years, however the District can not receive funding for the following year's District Grant until the projects are completed
- Clubs must pay for the project and then submit proof of payment to the Foundations Treasurer for reimbursement to the full extent of the grant.
- District Foundation Committee may place additional requirements on the grant
- Partnerships are encouraged

### **Evaluation of Application**

- While not required, the Committee will look to see if the project falls within one or more of Rotary's Seven Areas of Focus
- Club's giving history to the Foundation
- Whether or not it is a new project or just a request for annual funding of a club's project
- Club's track record in completing previous awarded grants
- Club's participation in the project, both manpower and financial
- Community participation in the project
- Partnerships with other clubs, organizations, companies

## **Timing**

- President-Elects are introduced to DDF Club Grants at Pre-PETS and PETS. Applications and MOUs are provided at that time
- Applications, MOUs and additional instructions are sent to Club Presidents in July
- Currently Applications are due to the Rotary Foundation Committee no later than October 1<sup>st</sup>. This date is evaluated each year by the District Foundation Committee.
- The Foundation Committee reviews the applications and makes its recommendation to the Rotary Foundation by the end of October. Clubs are notified at that time of the conditional award and amount of the Grant.
- The Rotary Foundation gives final approval of the grants and clubs are notified.

## **What will be on the form?**

- Into which of the Seven Areas of Focus of the Rotary Foundation does your project fall? Your project must fit into one or more of these areas: Peace & Conflict Resolution; Water and Sanitation; Literacy and Education; Maternal & Child Health, Disease Prevention; Entrepreneurship, and newly added this year, the Environment.
- What will your project solve in these areas? See below for creating objectives for your project.
- How will your club members be involved in this project?
- Whom will the project benefit and where will it take place?
- When will the project take place and how have you strategized and time-tabled the different steps you need to take to make the project a reality?
- What is the budget for this project?

## **How do you apply for this type of grant?**

To apply for this type of grant, you fill out the simple form signed by your President/President-Elect and your Club Secretary. You must also submit a Memorandum of Understanding. (Both are attached as part of the Appendix for this document.) You will have two years to complete the grant. When you get the bills for the grant, you send them to the Foundation Treasurer, who will reimburse you.

## **Global Grants**

Starting an international project and getting Rotary Foundation for the project is **NOT** an easy task. There is a long path that you must take before you even apply, and even after you have gone through the path, there is still no guarantee that the Rotary Foundation will fund it.

If your international project will cost more than \$30,000, then you should consider applying for a Global grant. This is a long and arduous project. Most people are unaware that the Rotary Foundation no longer matches any of the funds that a club raises for a project, and only matches 80% of whatever District Designated Funding was awarded by the District. Since we have limited funding available here, it is unlikely that you will get a grant for more than \$10,000. Rotary will match 80% of that, so your total that you will get for your project is only \$18,000. You may be able to work with clubs in other Districts that also apply for District Designated Funding for a Global grant, and the District where your project will take place can also apply for a District Designated Grant from their own District. You should also start your own fund-raising (more on that later in this document.) In 2020-21, the Rotary Foundation ran out of money and was forced to turn down nearly 2,000 projects, pushing them off until this Rotary year. All clubs who applied had to resubmit their grant proposals and be re-certified (see below).

### **How to prepare in advance before you even start:**

- 1) **Get your club qualified to receive a grant.** To do this, you must submit a Memorandum of Understanding and someone from your club must attend the Foundation Seminar (which is October 16<sup>th</sup> this year, this Saturday) OR someone must take the Rotary Foundation's online course.
- 2) To take the online course, first sign onto My Rotary. You will need to go to [www.Rotary.org](http://www.Rotary.org) and go to My Rotary, then set up an account (if you don't have one). You will be asked your Rotary membership number, which you can find on the label of the Rotarian magazine that you receive monthly. Set up a password and remember that.
- 3) Once you have signed into My Rotary, go to the bar across the top and click on "Learning and Reference." Then click on "Learning Center" on the left. When you see the various programs, click on The Rotary Foundation. You will find a Power Point that explains everything you need to know before you start your grant proposal. You will receive a certificate that you can print out when you have successfully completed the test at the end of the Power Point. *It is not easy!*
- 4) If it doesn't have one already, then your club should establish a Foundation so that you have non-profit 501(c)(3) status. This allows corporations, foundations, and individuals to donate to your club's projects and to deduct the donation from their taxes. Remember, donations to your Rotary Club are NOT tax-deductible. The process to get this status takes about six months. An accountant or attorney can usually help you.

The club can also choose to work with the District's own 501(c)(3) Foundation, the Walter D. Head Foundation, and can borrow its non-profit status. The Walter D. Head Foundation generally charges a fee of about 3% to use their non-profit status. You must get permission from the Board of the Walter D. Head Foundation first. Call PDG Emil Geering at 201-368-3000 or e-mail him at [limegeer@gmail.com](mailto:limegeer@gmail.com).

**How to *find* an international project:**

- 1) Sign into My Rotary. Click on Member Center. Then Click on Online Tools. Then click on Rotary Showcase. This will lead you to a form you can fill out where you can either enter a project that you are already considering and find partners or click on a kind of project you would like to offer and you will get a description of hundreds of projects looking for partners all around the world.
- 2) Talk to friends in other countries. Or, if you would like other countries to help you with a project in our area or in the United States, this will help you find partners.
- 3) You might be approached on Facebook or by a visiting Rotarian to help with a project in their country.

## What are the basics of a Global grant?

- 1) You must first find a host Rotary club – this club is in the area where the project will actually take place. Most of the projects should be generated by the host club. **To find a club in a specific area, download the Rotary Club Finder app on your Android or I-Phone, and put in the country.** You will be shown a list of all of those clubs and when they meet. When you put in your password, you can find out the names of the club officers. Most of the actual work on the project will be accomplished by the host club. They must implement a pre-assessment of the community and its need for the project, make the local contacts, purchase any equipment, follow-through with training, and maintain the equipment. In most cases, unless the project will actually happen in your neck of the woods, your club will be the International Club. The International Club collaborates on preparing the proposal (including the budget), submitting the grant proposal, works on finding funding for the project, and may send some volunteers to help install the project and to train those in the community where the project takes place on how to use the equipment and how to maintain it.
- 2) You must determine in which area of the seven areas of focus of the Rotary Foundation your project fits.
- 3) You must complete a community assessment before you even submit your project to determine what is needed, who will help. **You can find copies of how to do a community assessment online at [www.rotary.org](http://www.rotary.org).** The project must be collaborative right from the start, involving community leaders to help plan the project, those who will benefit from it and those who will install it.
- 4) The project must be **sustainable**. This means that even when you are finished installing your project, the project will continue for at least five to ten years and will involve and train those who will be using whatever your project provides, through preventive maintenance. The project must be flexible.
- 5) The project must have objectives that are **SMART**:
  - Specific
  - Measurable
  - Achievable (Realistic)
  - Results-Oriented
  - Time-tabled
- 6) Define the personnel who will be working on the project and their qualifications.
- 7) Create a committee composed of at least three members from each collaborating international partner Rotary Club and from the host club, as well as three people from the community where the project will take place. Hold regular Zoom meetings with a definite agenda that include all the committee members. In this way, you will define expectations on both sides.
- 8) Create a timeline for the project that includes what will happen once funding is approved, when purchases for equipment will be made, when installations will take place, when volunteers will come from the international partners and what they will do.
- 9) You need to create a timeline for the project – when will each step take place and in what order. It might be helpful to create a backwards calendar for this. To do this, have the entire committee envision what you will see once the project is completed, then go backwards and fill in all of the tasks you must do, equipment you must buy,

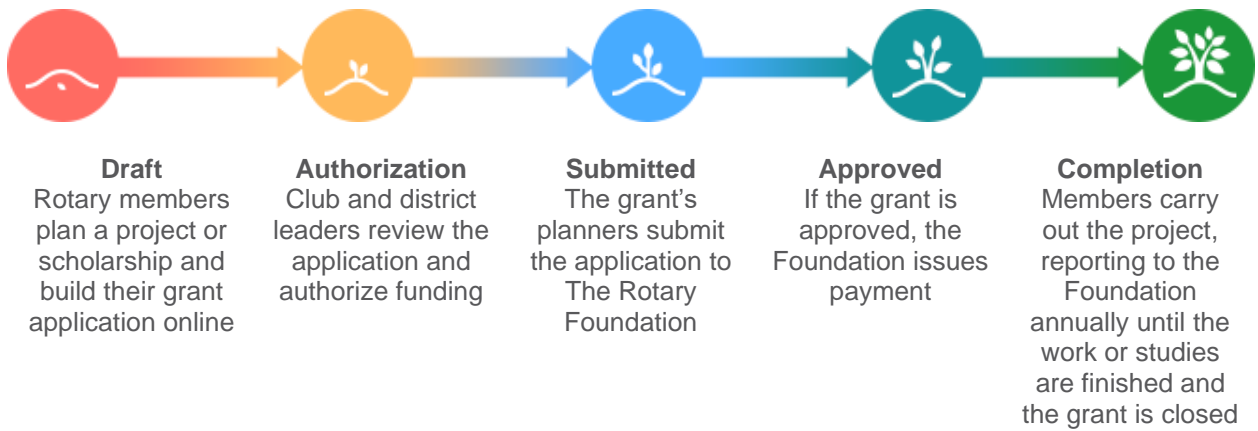
and training that must be accomplished and indicate when each step takes place. Once the grant is underway, use this plan as a guide to measure your progress.

## **Fund-raising for your projects other than through the Rotary Foundation**

Do NOT rely only on the Rotary Foundation to fund your project. You *must* reach out to other Rotary Clubs, other organizations, corporations, foundations.

- 1) Appoint someone on your committee to be the outreach coordinator. That Rotarian can contact other Rotary clubs inside and outside your district to make a presentation and ask for funds.
- 2) Ask a member skilled in media to create a video on the project that you can share with others when you make your presentation. Create a script for your presentations.
- 3) Develop a pledge form for your potential donors to fill out if they decide to support you.
- 4) Ask other Rotary Clubs in our District or other Districts for their help. You can put your project in the District 7490 Bulletin by sending it to Bonnie Sirower at [Botzie@aol.com](mailto:Botzie@aol.com). This is published every other week.
- 5) Create a wish list that you can put on your club's website that delineates specific portions of the project or pieces of equipment that someone can donate. Also, create something that shows your progress on raising the money. You should have a donate button online so that donors can give
- 6) Have all of your members post the project on Facebook and create an opportunity
- 7) Share your project online on the Rotary Showcase (see above).
- 8) **Reach out to Rotary Action Groups, such as WASRAG (Water and Sanitation Rotary Action Group). You can find a complete list of the Rotary Action Groups at <https://my.rotary.org/en/take-action/empower-leaders/rotary-action-groups>.** The people in these Rotary Action Groups can not only help you to prepare your proposal, but may even be able to support you with special funds from their own RAG. For example, WASRAG helped the Fair Lawn Sunrise Rotary Club with a pledge of \$2,000 towards its water project in Juticalpa, Roatan Island, Honduras.
- 9) **Take a short membership in the Foundation Center online. This can give you a list of corporations, foundations, and other organizations that you might approach. You must have 501 (c) (3) status to be able to apply for any of these grants. I have approached DG John Susani about taking a membership in this service, which can be found at <https://fconline.foundationcenter.org/fdo-search/member-index/>. You can take a membership for only a month and cancel any time.**
- 10) Keep your donors up to date on your progress by sending out a regular newsletter showing your progress and what is happening in the area where your project will take place. You might try [www.ConstantContact.com](http://www.ConstantContact.com) to help you develop this newsletter.

## The lifecycle of a Rotary grant



### Okay, we're all set to apply. What do we do next?

Use the Grant Center to apply for a grant, track its progress, report on it, and search for other grants in your district. **Just follow the instructions.** On [www.rotary.org](http://www.rotary.org), click on The Rotary Foundation, then apply for grants. You must have a preliminary draft into the Rotary Foundation and a grant number for you to apply for District Designated Funding on the simpler form.