2020-21

GRANT MANAGEMENT TRAINING
District 7910

Wednesday April 8, 2020

Victor Tom, DGSC Chair 2020-21, DGND
vtom0@yahoo.com
Grant Management

Ensures that projects

• Fulfill grant objectives to meet the needs of beneficiaries
• Adhere to technical standards to maximize project impact
• Have proper financial controls to safeguard funds
• Maintain Rotary Foundation’s highest charity rating
Grant Management Training Modules

Module 1  Foundation Grants  15 Min
Overview

Module 2  District Grants in 2020-21  60 Min
Requirements, Process, Timeline, Grant amount, Prior Examples, ClubRunner Grants Module, Implementation, Report, Close-out

Module 3  Global Grants in 2020-21  20 Min
Requirements, Process, Time line, Grant amount, Caps, Prior Examples, Funding, Best practices, Implementation, Report and Close-out
Module 1

FOUNDATION GRANTS
Learning Objectives

• Learn the purpose of The Rotary Foundation and Foundation Grants
• Understand how Foundation and grants are funded
• Learn similarities and differences between grant types
• Understand how your club can participate in grants
Rotary International (RI) and The Rotary Foundation (TRF)

- RI: Organization that carries out activities through

| 1.2 million Members | in 35,000+ Clubs | in 534 Districts | in 34 Zones | In 7 Regions |

- Members pay dues to the club which include a charge from the district and a charge for RI.

- TRF is the charitable arm of RI
  - It is totally funded by donations to its various funds, with the Annual Fund being the one that largely supports Foundation grants.
  - Clubs raise funds for their service projects and leverage them with grants from the district and TRF
Foundation Grants

• TRF enables Rotarians to *Do Good in the World*
  • Through several types of foundation grants, of which district grants and global grants are covered in this training program
  • Grants utilize the expertise, passion and compassion of Rotarians through effective and sustainable projects around the world within six areas of focus
  • Service is one reason people join and stay in Rotary
    “Service above self” and “One profits most who serves the best”
  • Involvement in grants has been shown to increase club participation and feeds into increased Foundation giving
    “ROTARY IS SERVICE”
## Areas of Focus

<table>
<thead>
<tr>
<th>Icon</th>
<th>Area</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="water.png" alt="Water" /></td>
<td>Providing clean water</td>
</tr>
<tr>
<td><img src="health.png" alt="Health" /></td>
<td>Fighting disease</td>
</tr>
<tr>
<td><img src="people.png" alt="People" /></td>
<td>Saving mothers and children</td>
</tr>
<tr>
<td><img src="education.png" alt="Education" /></td>
<td>Supporting education</td>
</tr>
<tr>
<td><img src="economy.png" alt="Economy" /></td>
<td>Growing local economies</td>
</tr>
<tr>
<td><img src="peace.png" alt="Peace" /></td>
<td>Promoting peace</td>
</tr>
</tbody>
</table>
Foundation Funds

• Annual Fund - Share, supports humanitarian grants in any of the Areas of Focus
  • Every Rotarian Every Year – at least $1 every year
  • Sustaining member – at least $100 every year
  • Paul Harris Society – at least $1000 every year

• Specific Global Grant, direct to specific projects

• Polio Plus Fund, donations matched 2:1 by Gates Foundation

• Responding to disasters

• Endowment Fund, major gifts or bequests of $10,000 or more.
Annual Fund - Designations

The primary source of funding for Foundation grants and activities worldwide. Eligible for Paul Harris Fellow recognition.

- **Annual Fund – SHARE**: Only gifts to Annual Fund-SHARE will generate District Designated Funds (DDF). Each District designates the use of these funds.

- **Annual Fund – Area of Focus**: Six different funds for each area of Focus, each fund used to provide a match for club and district contributions to a specific global grant in that area of focus.
How Your AF-Share Donation Returns to D7910

TRF AF-Share

TRF Holds Funds
Spends Interest to Manage Grants

World Fund

District Designated Fund
D7910

District Grants
Global Grants

2023-24
$50 DDF + $50 WF

2020-23
$ interest

2020-21
$100 Donation
Increasing Club Participation Last 3 Years for District Grants

More grants means more service projects
Unfortunately - Donations Have Fallen

About $150k Donated

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<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td>$200k</td>
<td>$150k</td>
<td>$200k</td>
<td>$100k</td>
<td>$100k</td>
</tr>
</tbody>
</table>
Foundation Grants

- The Foundation has two types of grants
  - District, and Global
- The Foundation will award D7910 a Master District Grant, DGxxxxxx, for administration of district grants to clubs. The grant amount will be approx. $37,500
- D7910 will also have $37,500 DDF available for helping clubs do Global Grants during 2020-21
- Clubs should get very familiar with the Area of Focus Policy Statement, Terms and Conditions for Rotary Foundation Grants, and Eligible and Ineligible Activities for Grants
  - These documents contain best practices and provide useful guidance for both district and global grants
# District and Global Grants: Comparison

<table>
<thead>
<tr>
<th>Factor</th>
<th>District Grants</th>
<th>Global Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualification by District</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>Humanitarian need</td>
<td>In one Area of Focus</td>
<td>Prefers one Areas of Focus</td>
</tr>
<tr>
<td>Needs Assessment</td>
<td>Required</td>
<td><strong>Require TRF approval as first step</strong></td>
</tr>
<tr>
<td>Size</td>
<td>Less than $30k, Typically $1k to $2k</td>
<td>Large, above $30,000</td>
</tr>
<tr>
<td>Sponsorship</td>
<td>Club or District</td>
<td>Club or District</td>
</tr>
<tr>
<td>Partner Clubs</td>
<td>Mostly solo, some local partners, rarely foreign partners</td>
<td>Always with 2 or more clubs/districts in two countries</td>
</tr>
<tr>
<td>Location</td>
<td>Mostly in the district, some outside, even overseas</td>
<td>Always in the country of the Host club/district</td>
</tr>
<tr>
<td>District Match to Clubs</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>World Fund Match</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Sustainability</td>
<td>Preferred</td>
<td>Required</td>
</tr>
<tr>
<td>Final Approval</td>
<td>District</td>
<td>The Rotary Foundation</td>
</tr>
</tbody>
</table>
Foundation Grants
Club Qualification

• Qualification for Grant Participation: Eligibility criteria for both district and global grants

• Criteria required by the Rotary Foundation
  1. One member of the club receive Grant Management Training
  2. Sign the Annual Club Memorandum of Understanding (MOU)

• Criteria required by the District
  1. Appoint a Club Foundation Chair (ClubRunner)
  2. Set Goal for Annual Fund-Share (Club Central)
Foundation Grants
Maintain Club Qualification

• Maintain good standing under the District rules
• Comply with the all qualification criteria
• Maintain Grant Management Training
• Ensure compliance with the Club MOU
  • Appoint a club member or committee – Club Foundation Chair can lead the effort
• Fully implement stewardship practices to prevent misuse of funds
Foundation Grants
District Decisions

• Foundation related decisions are recommended by the District Grants Subcommittee led by its Chair, DGSC Victor Tom. Some key decisions are:
  • Use of DDF for global and district grants, and other Foundation Funds
  • Amount for district grants
  • Review procedures for applications including scoring rubric
  • District sponsored grants to address common needs in communities
  • Amount of DDF and limit on number of global grants per club
• These recommendations are then endorsed by the District Rotary Foundation Committee led by its Chair, DRFC Steve Sager
• All decisions are approved by the Foundation Advisory Board comprising DG, DGE, DGN and DGND.
Module 2

DISTRICT GRANTS
Module Learning Objectives

• Learn about district grants and D7910 rules
• Understand the applications and review process
• Develop a plan to implement your project
• Understand stewardship requirements
• Learn how to report and close out a district grant
Districts Grants

- District grants fund small-scale, short-term projects that address immediate needs in your community or abroad.
  - Overseas projects may be in countries without Rotary Clubs
- All projects must
  - Relate to the mission of The Rotary Foundation
  - Include the active participation of Rotarians
  - Comply with conflict of interest policy
    - No Rotarian benefits financially or personally from a grant
    - Benefit cannot be direct to a Rotarian or indirect to an associate of the Rotarian
  - Must avoid continuous or excessive support of any one beneficiary, entity, or community
# District Grants in D7910

Grants Subcommittee (GSC)

| District Grants Subcommittee Chair (DGSC) | Victor Tom, *RC of Bedford*
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Diana Nestorova, DG 2020-21</td>
<td>Cliff Rober DG (E) 2021-22</td>
</tr>
<tr>
<td><strong>TBD</strong>*</td>
<td>Steve Sager DRFC 2020-21</td>
</tr>
<tr>
<td><strong>TBD</strong>*</td>
<td><strong>TBD</strong>*</td>
</tr>
<tr>
<td>Area 1</td>
<td>Area 4</td>
</tr>
<tr>
<td>Julie Parent Shrewsbury Area 3</td>
<td>Paul Avella Littleton Area 5</td>
</tr>
</tbody>
</table>
2019-20 District Grants
#2091894

<table>
<thead>
<tr>
<th>Club</th>
<th>DG #</th>
<th>Project Name</th>
<th>Budget</th>
<th>Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acton-Boxborough</td>
<td>2008</td>
<td>So Am I – summer program</td>
<td>$1,000</td>
<td>$750</td>
</tr>
<tr>
<td>Ayer</td>
<td>2006</td>
<td>Ramps for Freedom</td>
<td>$3,000</td>
<td>$1,500</td>
</tr>
<tr>
<td>Bedford</td>
<td>2015</td>
<td>Memory Cafe</td>
<td>$3,000</td>
<td>$2,000</td>
</tr>
<tr>
<td>Billerica</td>
<td>2014</td>
<td>Backpacks for DCF</td>
<td>$5,000</td>
<td>$2,500</td>
</tr>
<tr>
<td>Brookline</td>
<td>2004</td>
<td>Brookline Thrives – weekend meals</td>
<td>$3,000</td>
<td>$1,500</td>
</tr>
<tr>
<td>Concord</td>
<td>2020</td>
<td>Boys &amp; Girls Club Homework Room</td>
<td>$7,000</td>
<td>$3,500</td>
</tr>
<tr>
<td>Fitchburg</td>
<td>2021</td>
<td>Dictionary Project</td>
<td>$1,615</td>
<td>$1,000</td>
</tr>
<tr>
<td>Fitchburg East</td>
<td>2024</td>
<td>Sam Pawiak Community Playground</td>
<td>$76,655</td>
<td>$4,000</td>
</tr>
<tr>
<td>Framingham</td>
<td>2017</td>
<td>Simpson Park Table &amp; Benches</td>
<td>$5,000</td>
<td>$2,000</td>
</tr>
<tr>
<td>Hudson</td>
<td>2010</td>
<td>Halloween Safety Kits</td>
<td>$2,500</td>
<td>$1,000</td>
</tr>
<tr>
<td>Lowell</td>
<td>2019</td>
<td>Community Market Program</td>
<td>$5,085</td>
<td>$1,500</td>
</tr>
<tr>
<td>Milford</td>
<td>2011</td>
<td>Milford HS Courtyard Revitalization</td>
<td>$3,100</td>
<td>$1,500</td>
</tr>
<tr>
<td>Montachusett Area</td>
<td>2023</td>
<td>A Bed for Every Child</td>
<td>$4,500</td>
<td>$3,000</td>
</tr>
<tr>
<td>Nashoba Valley</td>
<td>2018</td>
<td>Community Park Benches for Senior</td>
<td>$3,000</td>
<td>$1,500</td>
</tr>
<tr>
<td>Needham</td>
<td>2002</td>
<td>Needham Community Farm High Tunnel</td>
<td>$10,000</td>
<td>$3,000</td>
</tr>
<tr>
<td>Neponset Valley Sunrise</td>
<td>2001</td>
<td>Tanzanian Water Project</td>
<td>$6,600</td>
<td>$3,500</td>
</tr>
<tr>
<td>Northborough</td>
<td>2013</td>
<td>Nutrition 68 – meal program</td>
<td>$10,000</td>
<td>$3,000</td>
</tr>
</tbody>
</table>
## 2019-20 District Grants

### #2091894

<table>
<thead>
<tr>
<th>Club</th>
<th>DG #</th>
<th>Project Name</th>
<th>Budget</th>
<th>Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shrewsbury</td>
<td>2016</td>
<td>Shrewsbury Backpacks</td>
<td>$4,000</td>
<td>$2,000</td>
</tr>
<tr>
<td>Southborough</td>
<td>2020</td>
<td>Cash for Camperships</td>
<td>$2,200</td>
<td>$1,500</td>
</tr>
<tr>
<td>Tyngsboro-Dunstable</td>
<td>2022</td>
<td>Special Needs Fishing Day</td>
<td>$3,000</td>
<td>$1,550</td>
</tr>
<tr>
<td>Waltham</td>
<td>2005</td>
<td>Dictionary Project</td>
<td>$2,100</td>
<td>$1,050</td>
</tr>
<tr>
<td>Wellesley</td>
<td>2003</td>
<td>MassBay Food Security</td>
<td>$5,000</td>
<td>$2,500</td>
</tr>
<tr>
<td>Westborough</td>
<td>2007</td>
<td>Face Shields for COVID-19</td>
<td>$5,400</td>
<td>$3,600</td>
</tr>
<tr>
<td>Westford</td>
<td>2012</td>
<td>Pack a Meal 2020</td>
<td>$4,500</td>
<td>$2,250</td>
</tr>
</tbody>
</table>
Multi-club involvement and non-Rotarian participation in district grants is encouraged
   • Get ideas from past District Grant list

District sponsored projects focusing on common needs in multiple communities will be undertaken to get more clubs to participate
   • Hurricane Relief Grant 2017-18
   • Guatemala Stove Project 2018-19
   • Rotarian-made Face Shields for COVID-19 2019-2020

Only one district grant per club – Rotary/Rotaract/Interact
Successful District Grants

- Have achievable goals
- Meet community needs
- Are sustainable
- Involve a partner
  - Other Rotary Club(s) or Non-Rotary entity(ies)
  - Likeminded people working together
  - Help identify and recruit new members
- Have an implementation plan
- Maintain proper stewardship of funds
Design Your Project

- Survey community needs
- Get project ideas from other clubs
- Maximize score on Grant Rubric (>20)
  - Scoring is designed to help you design a better project (not just writing a check)
  - Beneficiaries, Service, partnering with community groups and other Rotary Clubs
  - You will upload your Rubric to your application
Scoring Rubric – An Example

1 to 5 scale, 10 measures

Maximum score: 53, Minimum Required Score: 20

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Score for different Values</th>
<th>Value</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Beneficiaries</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In year 1</td>
<td>1 to 5</td>
<td>6 to 8</td>
<td>9 to 15</td>
</tr>
<tr>
<td>In area of Youth</td>
<td>1 to 5</td>
<td>6 to 8</td>
<td>9 to 15</td>
</tr>
<tr>
<td><strong>Sponsor Club</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rotarians</td>
<td>1 to 3</td>
<td>4 to 8</td>
<td>9 to 12</td>
</tr>
<tr>
<td>Volunteer Hours</td>
<td>1 to 5</td>
<td>6 to 10</td>
<td>11 to 20</td>
</tr>
<tr>
<td>Small Club?</td>
<td>y or n</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Non-Rotarian Entity</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funding support</td>
<td>$1 - 50</td>
<td>$51-100</td>
<td>$101-200</td>
</tr>
<tr>
<td>Volunteers</td>
<td>1 to 2</td>
<td>3 to 5</td>
<td>6 to 9</td>
</tr>
<tr>
<td>Volunteer Hours</td>
<td>1 to 2</td>
<td>3 to 4</td>
<td>5 to 6</td>
</tr>
<tr>
<td><strong>Other Rotary Clubs</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clubs</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funding support</td>
<td>$1-50</td>
<td>51-100</td>
<td>$101-200</td>
</tr>
<tr>
<td>Volunteer Hours</td>
<td>1 to 2</td>
<td>3 to 5</td>
<td>6 to 9</td>
</tr>
</tbody>
</table>

**TOTAL SCORE**: 42

"Project Score" is computed when the values you determine for each measure is entered in the "Value for Project" column.
ClubRunner District Grants Module

Accessing the Listed Documents

Go to www.Rotary7910.org/
Hover over Foundation & Grants/District Grant Information
Click on the Document you want to view or download

Accessing the District Grants Module

Step 1: Log into www.Rotary7910.org
Step 2: Click on Member Login and log in as a D7910 member
Step 3: Click on Member Area in the upper right hand side
Step 4: Click on Grants and then on “Submit a Grant Request”*

* Only a grants-trained member of club can perform Step 4
Qualify Your Club

- Sign MOU (Pres-Elect, Pres, Club Foundation Chair) and return to me
- Have member trained in Grants (District Assembly)
- Enter Club Annual Fund Goal
- Enter Club Foundation Chair

*You cannot enter grant application until club is qualified*
Grant Process

• A general rule of thumb for this year will be typically 1:1 match with a maximum in the range of $1k to $2k (depending on number of proposals received)
• All grant applications will be reviewed between June 30 and July 30 by the Grant Review Panel which is comprised of club foundation chairs from all 7 district areas. They will recommend the grant amount to be awarded on the principle of “best use of funds.”
• The recommendations of the Grant Review Panel will be forwarded to the Foundation Advisory Board (FAB) who will make awards in late August (FAB is comprised of DG, DGE, DGN and DRFC)
Schedule For District Grants

For DG Projects delayed by COVID-19 - New checks will arrive after closeout
CREATING A BUDGET

- Realistic
- Competitive bidding (costly items)
- Reasonable prices
- Avoid direct donations to beneficiaries
- Disclose conflicts of interest
  - Partners, Beneficiaries or suppliers
Fill Out Online Application

• Grant Request requires only initial information
• After quick subcommittee review, we request more information
• Then you will complete online application by June 30
• If we require more information, we will request it
• Awards made in August
# Application Content
## Must-Provide Information

<table>
<thead>
<tr>
<th>Tab/Section</th>
<th>Information that must be provided</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DETAILS</strong></td>
<td>Rotary Clubs in the District participating in the project</td>
</tr>
<tr>
<td></td>
<td>Non-Rotary entities participating in the project</td>
</tr>
<tr>
<td><strong>APPLICATION</strong></td>
<td></td>
</tr>
<tr>
<td>Impact</td>
<td>Number of beneficiaries in year 1</td>
</tr>
<tr>
<td></td>
<td>Number of beneficiaries in DG focus area of Youth</td>
</tr>
<tr>
<td>Co-Operating Organization</td>
<td>Cash Contribution of non-Rotary partners</td>
</tr>
<tr>
<td></td>
<td>Volunteers and volunteer hours from non-Rotarian partner</td>
</tr>
<tr>
<td>Implementation Plan</td>
<td>Number of Rotarians from sponsoring club participating</td>
</tr>
<tr>
<td></td>
<td>Rotarian volunteer hours from sponsoring club</td>
</tr>
<tr>
<td></td>
<td>Monetary contribution from other Rotary Clubs*</td>
</tr>
<tr>
<td></td>
<td>Number of Rotarians and volunteer hours from other RCs*</td>
</tr>
</tbody>
</table>

* Participation by Interact and Rotaract Clubs will be deemed as “Other Rotary Clubs”
District Grant Implementation

• Upon receipt of district grant award notification
  • Open the special project account and transfer funds into the account to cover the total project cost.
  • An account opened for prior district grants can be used
  • Conduct the activities described in the application
  • Pay all project expenses out of the special project account
  • Avoid conflicts of interest
  • Evaluate the effectiveness of the project
  • Document the activities of the project – pictures, reports
  • Scrupulously keep records and retain them
• Publicize the project on club and district web sites, social media and local media – newspapers, TV etc.
District Grant Money Flows and Documentation

These would be in monthly bank statements
Stewardship

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

• Reporting any irregularities
• Rotarian supervision
• Financial records review
• Oversight of funds
  • Avoid direct payment to beneficiaries
• Timely submission of reports
Financial Management Plan

- Bank account for funds
- Distributing funds
  - Do not give cash or check to beneficiaries to spend; write checks to entities that provide materials or services to beneficiaries
- Use checks or bank cards to track funds
- Detailed ledger
- Observe local laws
Reporting Requirements

Reporting:

- Verifies grants were managed properly
- Provides valuable data for your club, partners, and Rotary
District Grant Reports

- Final Report submitted on line using the prescribed template
  - Scoring rubric on actual effort
- Upload required supporting documents
  - Bank statements (showing project costs. Funds received/spent)
  - Copies of canceled checks
  - Receipts/invoices for items purchased
  - Photos of the project activities
  - Acknowledgment letters from beneficiaries
Document Retention

• Provide access to documents for transparency
• Even though district has uploaded docs, retain local copies for 5 years
Module 3

GLOBAL GRANTS
Module Learning Objectives

- Learn about global grants and D7910 rules
- Understand the applications and review process
  - Financing a global grant
- Develop a plan to implement your project
- Understand stewardship requirements
- Learn how to report and close out a global grant
Global Grants

- Global grants support large international projects with long-term, sustainable outcomes in one or more of Rotary’s areas of focus. TRF World Fund match must be $15,000, minimum.
  - Overseas projects may be in countries without Rotary Clubs
- All projects must
  - Relate to the mission of The Rotary Foundation
  - Include the active participation of Rotarians
  - Comply with conflict of interest policy
    - No Rotarian benefits financially or personally from a grant
    - Benefit cannot be direct to a Rotarian or indirect to an associate of the Rotarian
  - Must avoid continuous or excessive support of any one beneficiary, entity, or community
Global Grants cont’d

- 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
  - Involve community members in the planning process. They can create the project plan with you or review it and provide feedback. The most successful plans allow Rotarians and community members to take action together.
- Confirm at the outset that the selected partner club and the district are qualified to participate in global grants
  - DRFC and DGSC can help

Refer to TRF Document 1000_guide_to_global_grants_en
Partner Selection and Cooperation

• One of the most important steps
  • Look for club(s) that have global grant experience
    • Must be qualified for global grant participation for current year
  • Strong in assessing community needs and conceiving a project
  • Local initiative and inputs are critical to success
• Agree on funding and implementing roles
  • Insist on local club having “skin in the game”
  • A “hand up” lasts much longer than a “hand out”
• Clear understanding of stewardship and reporting responsibility
## Example Global Grant Projects

<table>
<thead>
<tr>
<th>D7910 Rotary Club</th>
<th>Sturbridge</th>
<th>Wachusett Area</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Location</strong></td>
<td>Kosovo</td>
<td>India</td>
</tr>
<tr>
<td><strong>Global Grant #</strong></td>
<td>GG1756283</td>
<td>GG1986082</td>
</tr>
<tr>
<td><strong>Project Title</strong></td>
<td>DXA Scanner Project</td>
<td>Cervical Cancer Prev.</td>
</tr>
<tr>
<td><strong>Host RC &amp;District</strong></td>
<td>Prishtina Dardania D53</td>
<td>Pune' Laxmi Rd D3131</td>
</tr>
<tr>
<td><strong>Primary Area of Focus</strong></td>
<td>Disease Prevent/Treat</td>
<td>Disease Prevent./Treat.</td>
</tr>
<tr>
<td><strong>Beneficiaries</strong></td>
<td>Kosovo population</td>
<td>Indian Girl Students</td>
</tr>
<tr>
<td><strong>Over first five years</strong></td>
<td>10,000</td>
<td>10,000</td>
</tr>
<tr>
<td><strong>Total Budget</strong></td>
<td>$42,000</td>
<td>$94,500</td>
</tr>
<tr>
<td><strong>D7910 Clubs’ cash</strong></td>
<td>$9,000 from 2 clubs</td>
<td>$11,750 from 6 clubs</td>
</tr>
<tr>
<td><strong>Word Fund Match</strong></td>
<td>$18,700</td>
<td>$21,875</td>
</tr>
<tr>
<td><strong>#of Districts</strong></td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
## Example Global Grant Projects

<table>
<thead>
<tr>
<th>D7910 Rotary Club</th>
<th>Nashoba Valley</th>
<th>Billerica</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Location</strong></td>
<td>Kenya</td>
<td>Armenia</td>
</tr>
<tr>
<td><strong>Global Grant #</strong></td>
<td>GG1874105</td>
<td>GG1747329</td>
</tr>
<tr>
<td><strong>Project Title</strong></td>
<td>Micro-Flush-Toilet Project</td>
<td>Water and Education</td>
</tr>
<tr>
<td><strong>Host RC &amp; District</strong></td>
<td>Ruiru, D9212</td>
<td>Yerevan, D2452</td>
</tr>
<tr>
<td><strong>Primary Area of Focus</strong></td>
<td>Water &amp; Sanitation</td>
<td>Water and Sanitation</td>
</tr>
<tr>
<td><strong>Beneficiaries</strong></td>
<td>Students in Rural Kenya</td>
<td>Villagers</td>
</tr>
<tr>
<td><strong>Over first five years</strong></td>
<td>14,000</td>
<td>3,500</td>
</tr>
<tr>
<td><strong>Total Budget</strong></td>
<td><strong>$35,500</strong></td>
<td><strong>$51,816</strong></td>
</tr>
<tr>
<td><strong>D7910 Clubs’ cash</strong></td>
<td>$19,300 from 2 clubs</td>
<td>$14,610 from TBD clubs</td>
</tr>
<tr>
<td><strong>Word Fund Match</strong></td>
<td>$15,100</td>
<td>$20,605</td>
</tr>
<tr>
<td><strong># of Districts</strong></td>
<td>2</td>
<td>4</td>
</tr>
</tbody>
</table>
Global Grants Multiply $$

Cash from Clubs
+ $$ from district DDF
+ 50% of cash
+ 100% of DDF

$15,000
$10,000 D7910
$$ DXXXX

$7,500
$10,000

$42,500
Global Grants Application Process

• Two-step Process
  • District’s Global Grant Proposal Form (2 Pages plus attachments, if any)
    ▪ Complete the form (see next slide), sign, scan and send with attachments
    ▪ Need written confirmation of approval by Club’s Board
    ▪ Need written evidence of cooperation by overseas partner
    ▪ Ask the overseas partner to confirm qualification status

Refer to TRF Document 1000_guide_to_global_grants_en
Sustainable Projects

Giving a community the skills and knowledge to maintain project outcomes for the long term, after grant funds have been expended.

Don’t just give them a fish

Teach them to fish
Global Grants Application
Process cont’d

First Step of Two-step Process

• District’s Global Grant Proposal Form (2 Pages plus attachments, if any)
  • Complete the form, sign, scan and send with attachments
  • Need written confirmation of approval by Club’s Board
  • Need written evidence of cooperation by overseas partner
  • Ask the overseas partner to confirm qualification status
  • Be prepared to do at least one iteration, be patient and persistent
  • Must be approved by Grants Subcommittee
  • DDF requested is earmarked but not committed

Refer to TRF Document 1000_guide_to_global_grants_en
Global Grants Application Process cont’d

Second Step of Two-step Process

- Start with a “Needs Assessment” per the template from TRF; and upload it within the on-line application
  - Must NOT start before proposal is approved by Grants subcommittee
  - DDF is committed when
    - Project committees of both host and international clubs are listed
    - Budget and financing tables are entered

- More patience needed to complete the 12 step process
  - Be sure that all your plans are in place before you start to write the grant
  - Consult with DGSC and DRFC frequently
  - Be sure to answer the questions! It’s human nature to talk around a tough question rather than answer it directly. Be specific!
  - Allow 8 to 12 weeks for completing the 12 steps

Refer to TRF Document 1000_guide_to_global_grants_en
Creating a Budget

- Realistic
- Competitive bidding
- Reasonable prices
- Allow for contingencies up to 10% is allowed
  - After implementation, unused amount will need to be returned to TRF
- Disclose conflicts of interest
  - Partners, Beneficiaries or suppliers
Global Grant Financing

- Minimum budget for a global grant is US$30,000
  - World Fund match is at least $15,000
- DDF matched 100% with World Fund
- Rotarian and non-Rotarian cash contributions matched 50% with World Fund
  - Cash contributions may require 5% additional support charge to be paid
  - Non-Rotarian contributions credited to donor for PHF recognition points
- International sponsors provide at least 30% of total sponsor funding
- Funds cannot be raised from beneficiaries or cooperating organizations in exchange for a grant
- Funds cannot come from other Rotary grants
# GLOBAL GRANT FINANCING

**GG1757238 Second Chance Program – Kenya**

**Funding Plan for the Budget of $41,400**

<table>
<thead>
<tr>
<th>Source</th>
<th>Amt. US$</th>
<th>TRF Matching</th>
<th>Total US$</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>%</td>
<td>US$</td>
</tr>
<tr>
<td>Kisumu Central RC, D2430</td>
<td></td>
<td>50</td>
<td>3,500</td>
</tr>
<tr>
<td>District 9212 DDF</td>
<td></td>
<td>100</td>
<td>10,000</td>
</tr>
<tr>
<td>D7910 Club (s)</td>
<td>7,000</td>
<td>50</td>
<td>3,500</td>
</tr>
<tr>
<td>District 7910 DDF</td>
<td>10,000</td>
<td>100</td>
<td>10,000</td>
</tr>
<tr>
<td>Beverly Hills RC</td>
<td>5,000</td>
<td>50</td>
<td>2,500</td>
</tr>
<tr>
<td>District 7950 DDF</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rotarian – Rotary China</td>
<td>3,000</td>
<td>50</td>
<td>1,500</td>
</tr>
<tr>
<td>District 7190</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>25,000</td>
<td>17,500</td>
<td>42,500</td>
</tr>
</tbody>
</table>

**FUNDING:**  
HOST COUNTRY $0; INTERNATIONAL $42,500

*Difference between Budget and Funds reflects 5% TRF admin. fee*
Same Guidelines as for District Grants

- Set SMART Goals
  - Specific, Measurable, Achievable, Realistic, Time-specific
- Stewardship
- Financial Management Plan
- Document Retention
- Reporting Requirements

Greater responsibility usually falls on the host club. But the D7910 Club must bear a fair share
Q&A and Wrap-up