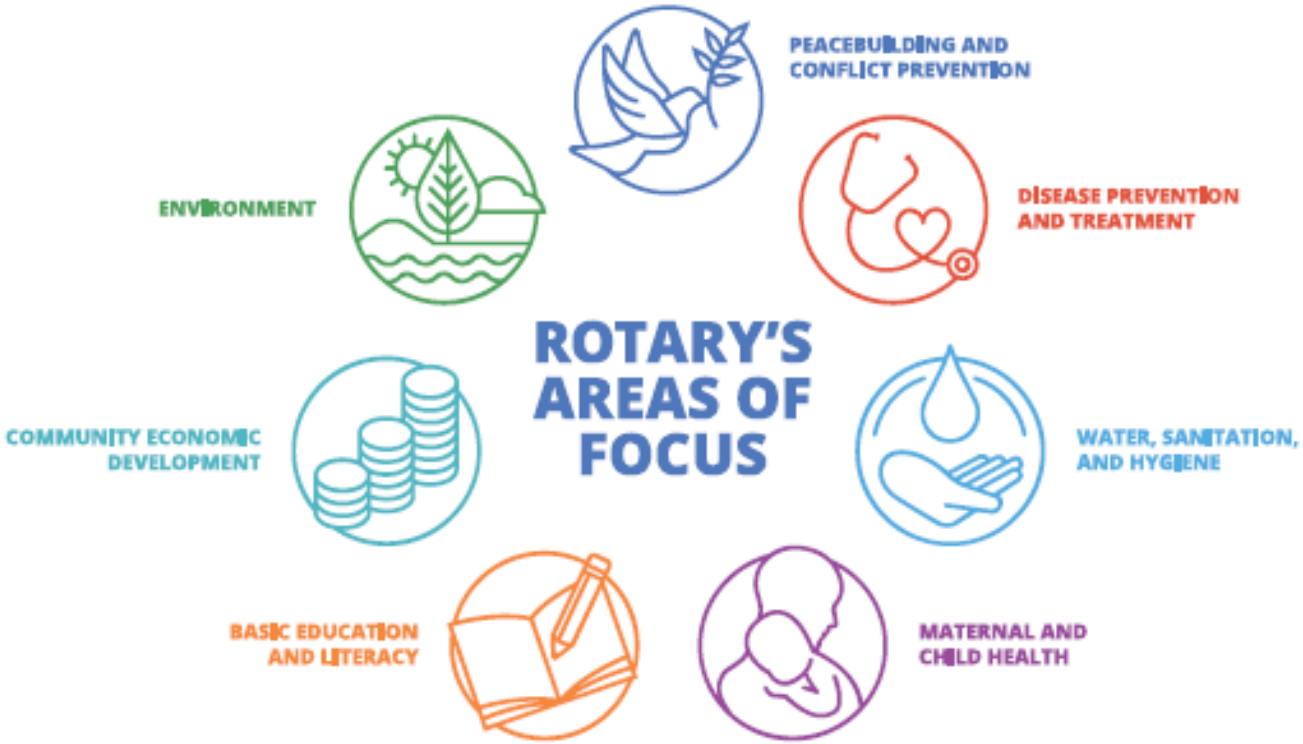


Grants Training

Presenter: Robin Steele
District Int'l Service Chair (DISC)
TRF Cadre Advisor – Community and Economic Development (CED)
Rotary Action Group Cadre advisor (CED)

Rotary

OVERVIEW OF ANNUAL FUND (where DDF comes from)

Annual Fund is one of 4 Foundation Funds

1) Annual Fund – Where most contributions go by default if funds are not "directed" to specific funds below

2) Endowment Fund– Earnings are used to support Annual Fund Programs

3) Disaster Relief Fund – Used for Club/District Disaster Response Grants

4) Polio Plus – Funds polio vaccinations/education

The Annual Fund is what supplies District Designated Funds (DDF) back to the districts

This DDF is used to match D5440 club contributions to Grants

Rotary

Annual Fund Share

DDF is a result of our district club members' donations to the Annual Fund Share

- Held 3 yrs in fixed income investments
- After 3 years
  - 47.5% to World Fund
  - 47.5% to DDF
  - 5% covers administration

How Foundation Contributions are Matched

District Designated Fund (DDF) Matching: 47.5% from Annual Fund returned to the district for grant matching (3 yrs later)

- Match is on cash contributions to District and Global Grants
- Our district (5440) will match up to 2X up to $6,000 on District Grants (applications due in early June)
- Our district (5440) will match 2X up to $15,000 for Global Grants prior to Dec and 2X up to $20,000 if funds remain after Dec. 1 (applications accepted at any time)

World Fund Matching: 47.5% Returned 3 yrs later from the of the Annual Fund for **Global Grants Only**

- Match is on DDF contributions to a grant
- World fund matches 80% of DDF contributions from any district

FOUNDATION MATCHING

The Power of Matching in when you contribute to the Rotary Foundation and Partner on Global Grants

Club's Cash Donation

(example: $7500)

2X D5440 DDF Match @ 2X (Example $15,000)

80% WF Match (Example $12,000)

Total = $34,500

4.6X the initial $7,500

NOTE: Max DDF match is $15,000 until Dec 1, then $20,000

Rotary

GLOBAL GRANTS

- Large, long-term projects
- Sustainable, measurable outcomes
- Aligned with Rotary's areas of focus
- International partnership
- World Fund match
- Supports projects, graduate student scholarships, and vocational training teams

Rotary

International District Grants

- District grants fund small-scale, short-term activities that address needs in communities abroad. Total budget normally $1,500 to $15,000
- Can be local or international
- Hands on meaningful participation of club members
- Approval by District is required to receive District Funding

Global Grants

- Global grants support large international activities with sustainable, measurable outcomes in Rotary's areas of focus. The minimum budget for a global grant project is $30,000.
- Host country & International Clubs are required.
  - Most projects are International
- Active Rotarian involvement
  - Considerable effort for both host/int'l clubs, a close relationship is needed between clubs and community along with shared goals and good communication
- Requires Community Assessment
- Approval by District is required to receive District Funding
- Approval by The Rotary Foundation is required for Rotary Foundation Funding

NOTE: Each year, there is also $16,667 DDF available for a $30K Global Grant Scholarship. Eligible clubs can submit applicants to the Grants Committee per the Rotary Global Grant Scholarship Process. There will be 1 grant per year and the candidate will be chosen on a first come, first serve basis.

NO CLUB FUNDS REQUIRED

Rotary

Global Grant Process – Time, Talent, and Commitment

Rotarians contribute their skills, expertise, and resources to help solve some of the world's toughest problems.

Committee members learn and follow TRF's "Guide to Global Grants" document

Committee members must learn and follow TRF Terms and Conditions

Global Grant Process – Time, Talent, and Commitment

Process can take **1-3 years**

1) Identify and document a project idea that meets area of focus policy requirements
2) Find a Rotary partner club (step 1 if possible)
3) Complete a Community Assessment
4) MUST create matchinggrants.org entry, include detailed budget and draft application (draft Word grant application)
5) Fund Raise (can start earlier, can take several months), obtain commitments for cash and DDF
6) Finalize Rotary.org application and complete reviews with Regional Grant Officer and/or CADRE advisor to ensure that your application looks good before submitting it in the RI Grant Center
7) Submit Application to RI for formal approval (Rotary.org Grant Center)
8) Implement Project, Manage Financial Records
9) Complete required reports (each yr) and upon completion

JOINT CLUB EFFORT

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
- Submit project reports in the Grant Center

1) Identify and document a project idea
2) Find a Rotary partner club

GLOBAL GRANT REQUIREMENTS (TRF)

Abide by "Area of Focus Policy Statement"

YOUR PROJECT MUST:

- ☐ Have a long-term, sustainable impact
- ☐ Include activities that align with the goals of one of Rotary's areas of focus
- ☐ Have a minimum budget of $30,000
- ☐ Address an important need identified by the community
- ☐ Strengthen the community's capacity to address its own needs

+

YOU MUST:

- ☐ Qualify your club or district for global grants every year
- ☐ Actively involve the benefiting community in the project
- ☐ Partner with a club in another country
- ☐ Act as primary sponsor of no more than 10 active global grants at a time
- ☐ Develop a project plan that includes a budget and a financial management plan
- ☐ Apply for a grant through the Grant Center
- ☐ Stay up-to-date in reporting for all active grants

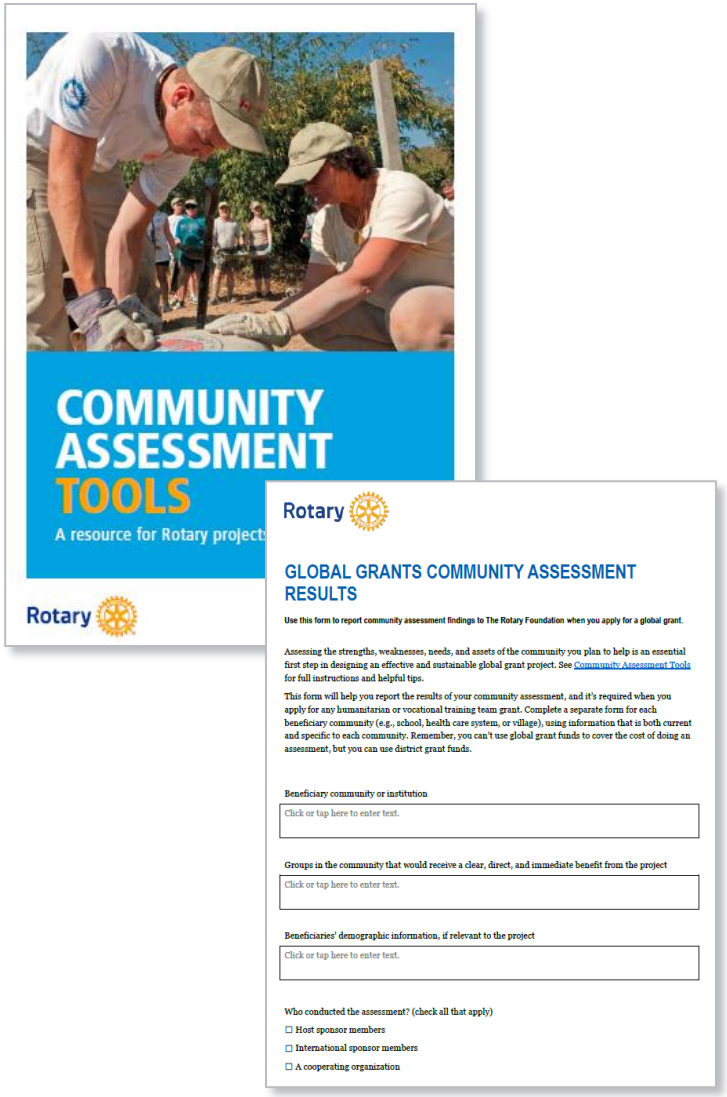
For humanitarian projects and those that involve vocational training teams:

- ☐ Conduct a community assessment before applying and include the results in your application
- ☐ Measure progress toward the outcome

Rotary

START WITH COMMUNITY - COMMUNITY ASSESSMENT

- Assess the community's strengths, weaknesses, needs, and assets
- Identify relevant opportunities for projects
- Maximize your club's ability to make a difference.
- Include results in your global grant application

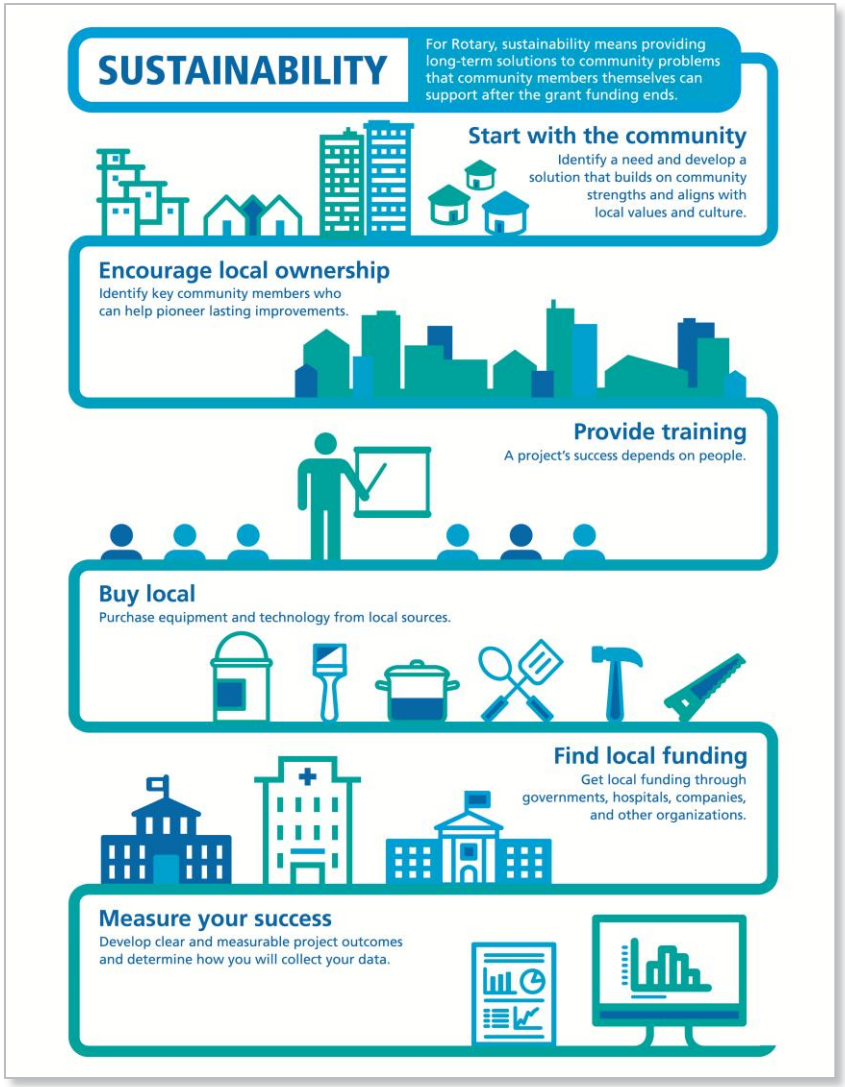


Rotary

3) Complete a Community Assessment

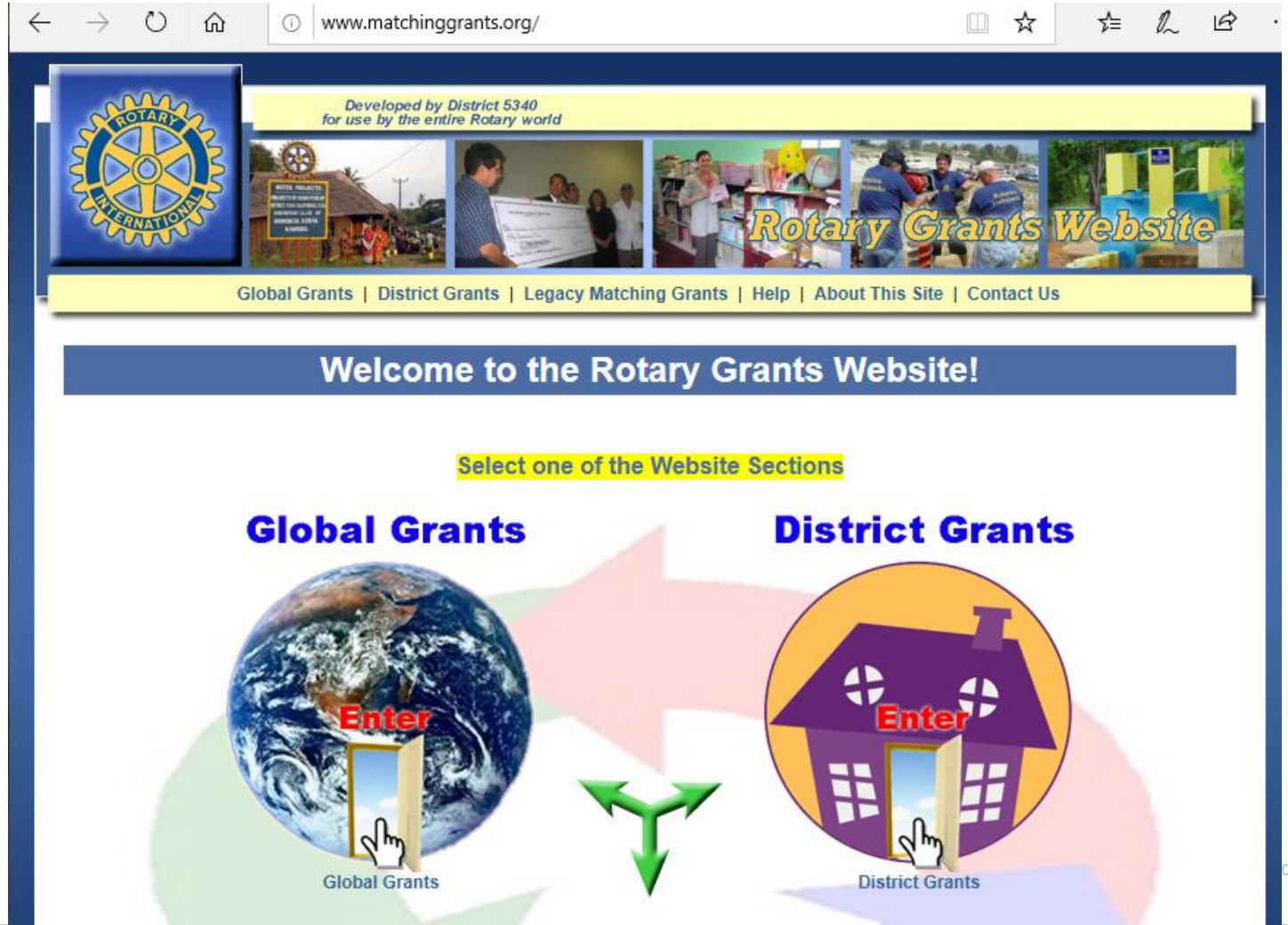
SUSTAINABILITY

- Clearly explain specific sustainability plans
- Pay special attention to:
  - Training
  - Measurement
  - Financial sustainability



MUST Create an entry on the MatchingGrants.Org Website

4) MUST create matchinggrants.org entry, include detailed budget and draft application



Rotary

EXAMPLE: El Potrero Matching Grants Entry

https://www.matchinggrants.org/global/project2704.html

Developed by District 5340
for use by the entire Rotary world

My Account | Search | Contact Us

Main List | Submit Project | Pledge Support | Help | About This Site | District Grants | Matching Grants

G-2704 **Clean water for El Potrero** Administration

Description | Financing | Documents | Photos | History Logs

Project Description

Region: Central America **Country:** Guatemala **Location:** El Potrero **Total Budget:** $50,342

Area of Focus: Water, sanitation and hygiene

This project will increase awareness of the benefits of clean water, sanitation and hygiene and enhance and strengthen the access and capacity of safe drinking water. One component will be interactive education programs that will enhance the communities' knowledge of the benefits of safe water, proper sanitation, and good hygiene. A second component will be assistance in development a new safe water source for the community and the training and education in the maintenance and governance of the system for a sustainable future. This will involve building a spring box, water storage tank, and distributions system in the community. A third component will be the addition of 13 latrines for families in need.

Community description: The community of El Potrero is part of the village of El Tablón which is in the northern part of the municipality and department of Sololá, just north of Lake Atitlán in Guatemala. The Mayan language spoken by the people is Kakchiquel.

Background: The water system in the community of El Potrero was built more than 34 years ago. Originally 30 families had been

Sources of Funds: Grant Must be Fully Funded prior to Submission to RI

- Club Funds
- Other club(s) in District or another District
- Outside organization donations
- Individual donations
- District or other District Designated Funds (DDF)
- Rotary Foundation World Fund Match

5) Fund Raise (can start earlier, can take several months), obtain commitment for cash and DDF

G-2704 **Clean water for El Potrero** Administration

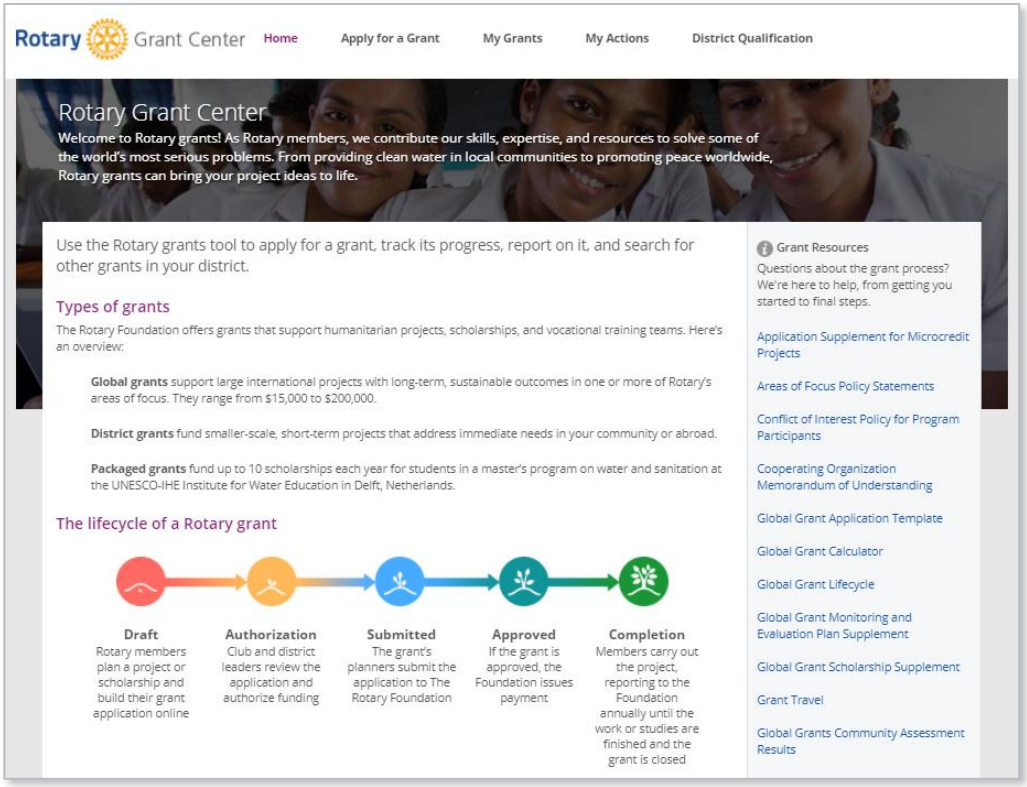
Description | Financing | Documents | Photos | History Logs

Proposed Financing

Existing Contributions Towards This Project	Date	Cash	DDF	Total
Fort Collins (5440)	24-Mar-21	$7,500	$15,000	$22,500
Glenview-Sunrise (6440)	1-Apr-21	$5,000	$2,508	$7,508
District 6440 DDF	18-Apr-21	-	$3,516	$3,516
Amount Requested from The Rotary Foundation		-	$16,818	$16,818
Total				$50,342

SUBMITTING ROTARY INTERNATIONAL GLOBAL GRANT APPLICATION

- Final Applications are submitted through the Grant Center on My Rotary



6) Finalize Rotary.org application and complete reviews with Regional Grant Officer and/or CADRE advisor to ensure that your application looks good before submitting it in the RI Grant Center

7) Submit Application to RI for formal approval (Rotary.org Grant Center)
8) Implement Project, Manage Financial Records
9) Complete required reports (each yr) and upon completion

GRANT INELIGIBILITY

If your grant application doesn't meet global grant requirements, your regional grants officer will explain why and suggest the changes you would need to make to meet them. If you and your partner club can't make these changes, your project will not be eligible for global grant funding.

Grant applications are most often denied because:

- The project doesn't fit any of Rotary's areas of focus
- The project has a high risk of failure or isn't sustainable
- The project benefits another organization's programs
- A community assessment was not conducted

EASY alternative to being a lead club on a global grant

How to Donate to an existing Global Grant

1) Go to https://www.matchinggrants.org/
2) Click on "Global Grants"
   a. You will see all grants for '24-25 that are using matchinggrants.org
   b. If you want to see D5440 grants only, Click the "Search" button in the upper right corner, under "Search for Projects" enter District 5440 (you can also enter other fields as desired)
3) Click grants you are interested in, that have a status of "Needs $"
4) Contact the lead clubs (contact info is listed under the grant description) to ensure the grant is still actively looking for funding
5) To contribute, click on the "Financing" tab and enter your contribution under "Add a contribution", also enter 2 times this amount under ***"Amount contributed by this District"*** to request a D5440 match
6) When the grant is approved by RI you will be contacted to send your funds to TRF, once you send your funds to TRF the matching DDF will also be released to the grant

NOTE: Max DDF matching this case is $5,000 until Dec 1, then $10,000

ROTARY RESOURCES

- A Guide to Global Grants
- Grant terms and conditions
- Area of focus policy statements
- How to Use the Grant Center

PEs must complete Club Qualification on the District website by Jun 1

HANDOUT IN PETS PACKET

1. **MUST GO TO THE DISTRICT AND GLOBAL GRANTS PAGE TO COMPLETE 2025-2026 GRANT TRAINING/QUALIFICATION BY JUN 1, 2025**
2. **MUST ENTER NEXT 2 YEARS OF PRIORITY GOALS IN ROTARY CLUB CENTRAL**
3. **PE AND CURRENT PRES. MUST SIGN THE MOU THAT WILL BE SENT TO YOU AFTER YOU SUBMITTED QUALIFICATION QUESTIONAIRE**

Everything you need to know about District/Global Grants (detailed processes from start to finish, …) is under the Foundation and Grants tab, subcategory District and Global Grants, on the District website

www.rotary5440.org

We are here to help ☺

- District Grants Committee
- District Area of Focus experts
- Regional Grants Officers
- TRF Cadre Advisors