

D5750 District grants Training – 2017-2018 Rotary Year

This year D5750 DGE Hal Stevens has asked that we experiment with using online grants training as an alternative to having the required training in a formal seminar setting. The goal is to make the training more assessable to all Rotarians in the district and to expand club members' understanding of both global and district grants.

Using online training, clubs can meet the qualification requirement that 2 club members attend grants training AND make information about grants available in detail to every club member. Currently it is planned that clubs can become qualified ONLY by completing the Online Training. Remember, two members must complete the training.

For this experimental year we have elected to use a training program developed by District 7780 and posted within the Learning Section of the Rotary International website. It is believed that the elements presented in this onsite training cover the basics that must be understood to successfully participate in global or district grants.

However, there are differences between practices in D7780 and D5750. This document provides instructions to complete the training and explains the differences between our districts. Keep in mind that to successfully complete the quiz at the end of each of the 3 modules, you must answer the questions from the perspective of D7780. Completing all of the modules and the quizzes should take less than 1 hour.

Any questions that come up can be referred to the chair of the committee involved:

Kevin Clark – District Rotary Foundation Committee Chair (DRFC)
Rotary5750@kdclark.com cell: 405.780.0185

Larry Stone – Global grants Committee Chair
larry.stone@fourstone.com cell: 405.245.4821

Lance Singleton – District grants Committee Co-Chair
lance@lancesingleton.com cell: 405.401.5953

Patricia Rayas-Duarte - District grants Committee Co-Chair
Rotary5750.Patricia@gmail.com cell: 405.762.2341

Mary Jane Calvey – International Service Committee Chair
mjcalvey@rwmsinc.com cell: 405.401.4443

Reaching the Online Grants Training Module Series

Step 1. Go to <http://rotary5750.org/sitepage/online-grants-training>

Step 2. Click on “District Grants Training Module 1” and proceed to watch the training video. Differences between the practices of D7780 shown in the video and D5750 practices are outlined below.

Step 3. Back on <http://rotary5750.org/sitepage/online-grants-training> click on “Grants Training Quiz #1” to take the online quiz. If you prefer, you can click on “PDF Grants Training Quiz #1” to print a paper copy of the quiz to complete, scan, and email to [Lance Singleton](#). Remember that the quiz answers should reflect the information in the video as it pertains to D7780.

Step 4. Repeat steps 2 and 3 for the remaining two modules.

Beginning the Grants Training Module Series – Part One, Intro

This begins an introduction by the current DGE from D7780. Virtually everything he says is applicable to our district. At one point he notes that the district has more money to spend than ever before. This is true for D5750, also. For 2017-2018 we will have \$131,815 available. And, for 2018-2019, that number will reach \$147,332.

The second part of the Module is presented by the District Rotary Foundation Committee Chair (DRFC). You will notice that she alludes to an incentive award for the first member of each club to complete the training. We DO NOT provide this incentive. From this point on, comments are made about differences between D7780 and D5750 methods and criteria.

At the Slide on Page 7, the narrator discusses the method whereby the district determines its spending plan. In D5750 our plan is based on feedback from clubs, historically at the grants training seminar, plus consultation with the DG, DGE, DGN and DGND and comments from the district conference. Since the new grants model was introduced, D5750 has always allocated the maximum amount allowed (50% of District Designated Funds, or DDF) to district grants.

At the Slide on Page 8, the narrator notes that for a global grant their district requires that the club or clubs contribute a minimum of \$10,000. In D5750 we do not have that requirement for a club wishing to sponsor an international global grant. We develop the funding requirements in consultation with the global grants committee, our district clubs and our international partners.

For every global grant project, it must be remembered that at least 30% of the total money provided by club funds and DDF must come from outside the project country.

At the Slide on Page 9, the narrator notes that sustainability must be considered for both district and global grants. This is not the case for district grants. There are no sustainability criteria for a district grant.

At the Slide on Page 11, the slide shows dollar value range for district grants. In D5750 we do not have a firm rule on the amount of money that can be requested for a district grant. Details on this will be noted in the errata for the module on district grants.

- We have one additional requirement that was not noted. The club must maintain a separate bank account for grants. All grant-associated funds must be deposited into this separate account and all grant expenditures must be made from this account.

At Slide on Page 14, ignore this slide. D5750 contact information is provided on our website under the Foundation tab.

NOW, TAKE THE QUIZ and PROCEED TO MODULE TWO

Grants Training Module Series – Part Two, Global Grants

This Module is fairly straight forward and what is noted here for the most part applies to D5750 also.

At the 2:07 mark - Slide page 4, there is a narrative of examples of global grants that D7780 is currently involved in. For examples of some of the projects D5750 have accomplished please go the District 5750 website – Foundation tab. There are two videos available there. The first is on the Rotary Foundation tab and the second is on the Global grants tab.

At Slide Page 5 – 3:04 mark, the narrator notes that the club(s) need to raise \$10,000 AND that that would be the minimum the club would need to raise to get to the \$30,000 minimum grant threshold.

- First, as noted earlier, D5750 does not have minimum club cash commitment for international projects that are performed outside of the district.
- Second, **the narrator misspoke** when indicating that \$10,000 was the minimum needed to get to the \$30,000 required threshold. Grant funding is much more complex than that.
 - Here are the basics. Global grants require a minimum grant from The Rotary Foundation (TRF) of \$15,000. Suppose an international global grant project costs \$30,000. If a district were to decide to fund it entirely with DDF, the district could allocate \$15,000 to the Project. TRF matches DDF 1:1. So, \$15,000 DDF is matched with \$15,000 from TRF = \$30,000 Project.
 - Club money on the other hand is matched \$.50 to \$1.00. So, a club contribution of \$10,000 is matched with \$5,000 from TRF, yielding a total project size of only \$15,000 and a total grant of only \$5,000....well short of the

minimum grant level of \$15,000.

NOW TAKE THE QUIZ AND PROCEED TO MODULE THREE

Grants Training Module Series – Part Three, District grants

This module will have the most differences between D7780 and D5750. Each district creates its own rules and procedures for handling the district grant. In fact, each DGE can decide how the district grant will be handled during his or her year as DG. So, specific rules can change from year to year. Each year there are tweaks made to our policies and procedures based on what was experienced or learned during the previous year. Mostly, however, the tweaks have been minor.

In D5750 the DRFC and the grants committee meet with the DGE, DGN and the DGND to try to develop a coherent and coordinated policy with respect to rules, procedures and requirements. But, it is important to note that the DG and DRFC have the final say on how district grants are administered.

At Slide Page 3, the narrator begins to provide examples of projects approved for district grants in D7780. These examples, while not from our district, provide insights into things it is possible to do with a district grant.

At Slide Page 5, a list of procedural rules is presented. D5750's procedural rules differ on both items 5 and 6.

- With respect to item 5, D5750 requires that a club contribute at least 1/3 of the total project cost of the District grant. For example, if the total project cost is \$1,500, the club contribution must be at least \$500. And, we do not have a small club exception.
- With respect to item 6, D5750 permits a club to submit more than one project. However, if a club submits multiple projects, the club must designate one project as its priority project. Typically, the committee will approve only one project per club during the first award period.

At Slide Page 6, the narrator indicates in item 2 that sustainability must be considered as a project element. This is NOT a TRF criteria for district grants and D5750 does not consider sustainability in evaluating district grant projects. In addition, in item 4 the narrator comments on the fact that if funds are limited, a club's previous commitment to TRF is considered.

D5750 has two important criteria with respect to club giving to TRF. First, and MOST IMPORTANT, to be eligible to participate in a district grant, a club MUST have attained at least a \$50 per capita level of giving to TRF during the previous Rotary year. Second, if funds need to be rationed, both project impact and a club's absolute level of support to TRF may be considered in prioritizing grants to be awarded.

At Slide Page 7, the narrator discusses travel. IGNORE this slide and narration. All questions about travel involved with a district grant should be directed, prior to the application, to the DRFC or district grants chair. Travel is a touchy area and needs to be authorized on a case-by-case basis prior to application submission.

At Slide Page 8, the narrator discusses how applications are judged and approved. Go ahead and listen to this section to gain insight into how another district handles the screening process.

- In D5750, all applications are sent to the district grants committee chair. The district grants committee is composed of the chair and 4 to 6 Rotarians recommended by district leadership and clubs and approved by the DRFC. The DRFC oversees the committee, but does not materially participate in the evaluation process, except to determine eligibility issues.
- By-and-large, the D5750 rules are that the committee tries not to assess the individual merits of one project over another. The committee begins with the mindset that its job is to determine IF THE PROJECT IS ELIGIBLE or not. If not, the mindset is to see how the committee can help the club modify the project so that it is eligible. The committee does not attempt to rank one club's project against another club's project.
- The committee does, however, occasionally rank multiple projects submitted by the same club. There are times that a club will submit multiple project applications and will rank them as to the club's priority. When multiple projects are submitted, the committee reserves the option to independently order the rankings.
- In the event that a situation presents where the total cost of projects exceeds the availability of available district grant funds, the committee negotiates with all clubs to revise the funding schedules of several projects so that all clubs' eligible projects can be completed successfully. To date, the district has not had to decline an eligible project.
- In the final analysis, the district grants committee chair and the DRFC have final say over the allocation of district grants funds.

At Slide Page 10, the narrator covers the stewardship aspects of district grants. Item 5 notes reporting of irregularities. Conflicts of interest, misuse of grant funds, and other irregularities need to be reported. To report any of these types of issues, go to the district website and click on the Foundation tab and then click on Report on Misuse of Grant Funds. This link goes directly to the independent district stewardship officer and is an anonymous connection.

NOW, TAKE THE QUIZ. If you have taken the quizzes online, they will automatically be sent to our District Grants Co-Chairs. If you elected to print the quizzes to take them on paper, please scan your responses and email them to [Lance Singleton](#).