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DISTRICT 7890 GRANT MANAGEMENT WEBINAR



YOUR MODERATORS

Prasad Menon, PDG
District Rotary
Foundation Chair



Eileen Rau, PDG
Zone 32 Regional Rotary
Foundation Coordinator

AGENDA

- Rotary Foundation Basics
- The relationship between donations & grant funding
- The difference between Global and District Grants
- The areas of focus
- Club qualification
- District and Global grant applications
- Stewardship
- Available Resources

WHAT IS THE ROTARY FOUNDATION?

- The **Mission** of The **Rotary Foundation** is to help Rotary members to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty



SUPPORTING THE ROTARY FOUNDATION



PolioPlus Fund
End Polio Now



Annual Fund
For support today



Endowment Fund
To secure tomorrow

Disaster Response Fund
Disaster Relief

END POLIO NOW: MAKE HISTORY TODAY



TRIPLE YOUR IMPACT

For the next three years, the Gates Foundation will match every \$1 Rotary commits to polio eradication 2-to-1, up to \$50 million per year.

Your Donation	The Bill & Melinda Gates Foundation	Total Contribution to Fight Polio
\$25	\$50	\$75

Which can purchase:

150 vests for volunteers, to help health workers stand out in a crowd and safely administer vaccines	75 vaccine carriers to keep the polio vaccine cool and effective	600 purple finger markers to mark children's pinkies to show they've been immunized
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HOW TO HELP

Learn. Share. Donate.



COUNTDOWN TO
HISTORY

ROTARY'S ENDOWMENT

- Contributions are professionally invested.
- Only the earnings are spent.



ANNUAL FUND

- Primary funding source for Foundation grants and activities
- Supports local and international grants through the SHARE system
- Contributions are credited to the donor's club and applied to the club's Annual Fund goal

THE JOURNEY OF YOUR ANNUAL FUND-SHARE DONATION



Donation is invested for
3 years; growth supports
Foundation operations.



SPENDING DECISIONS SHARED

World Fund
(Trustee discretion)



GLOBAL
GRANTS AND
PROGRAMS*

**District
Designated
Funds (DDF)**
(District discretion)



DISTRICT
GRANTS

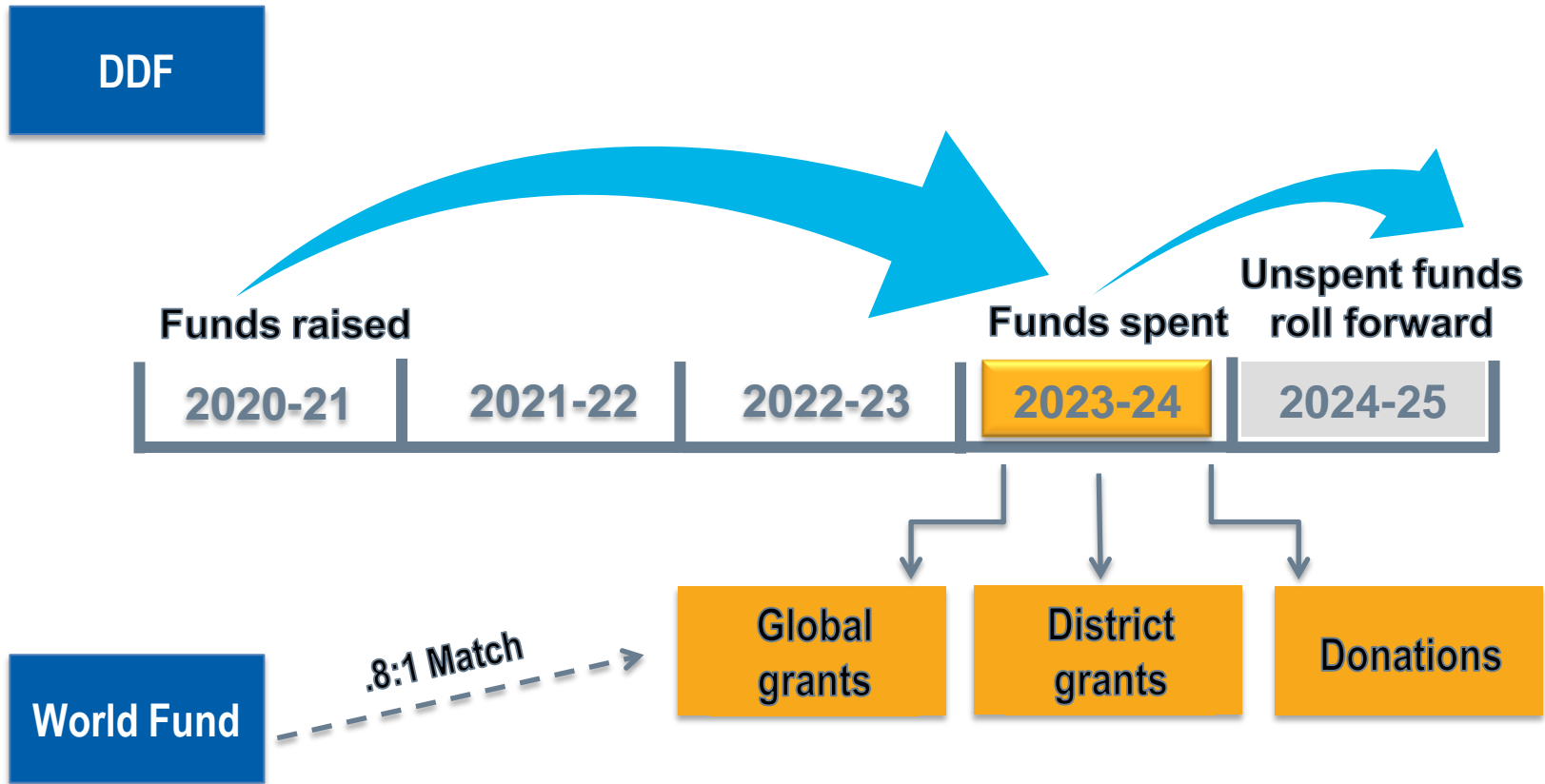
DISTRICT
GRANTS

GLOBAL
GRANTS



*Includes PolioPlus, Rotary Peace Centers, other districts,
and the Endowment Fund (areas of focus)

SHARE PROCESS



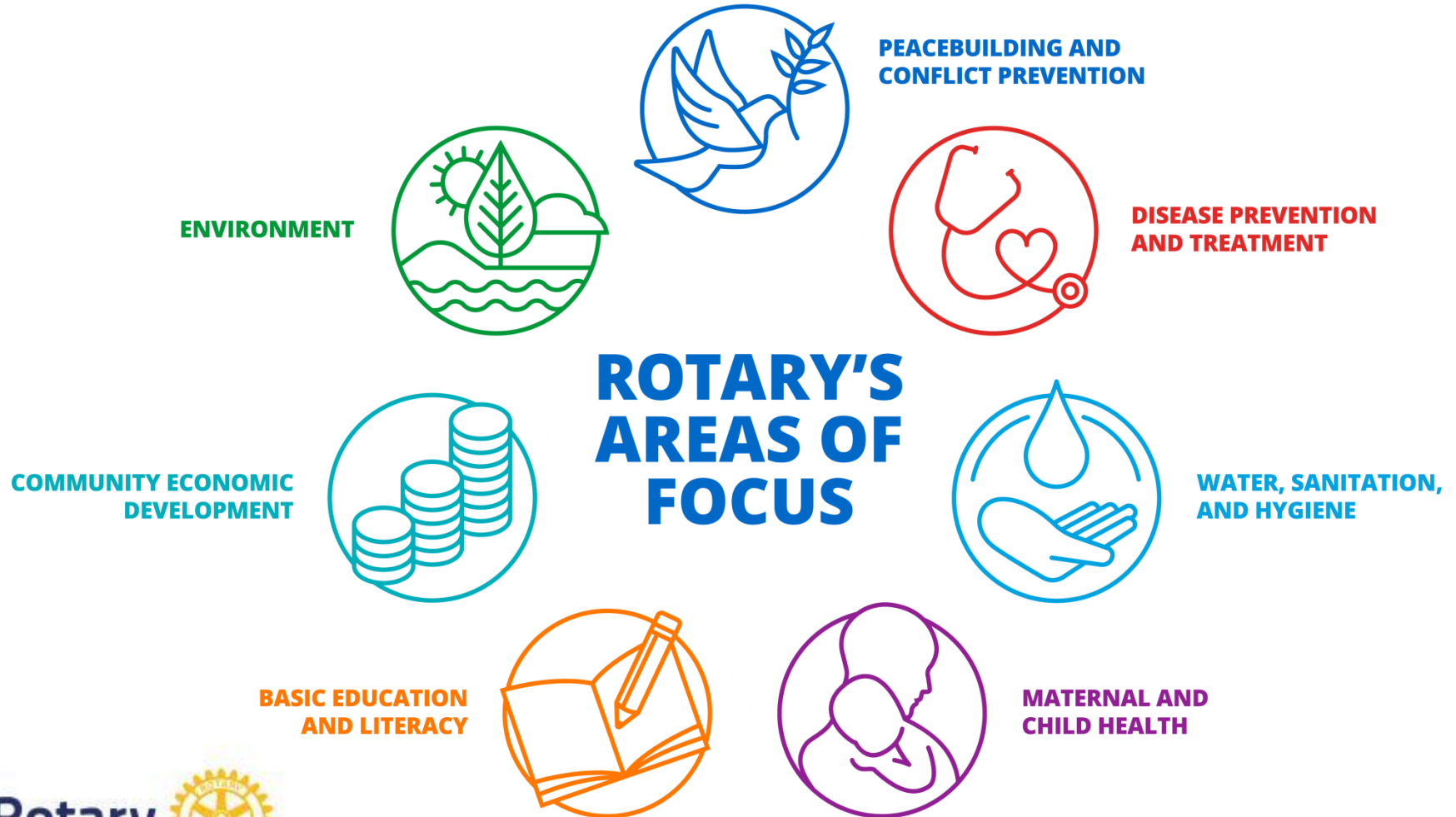
CLUB QUALIFICATION

- Send at least 2 club members to one of the Grant Management webinars this Rotary year- 2022-2023.
- Submit your club's Foundation goals into Club Central on [rotary.org](https://www.rotary.org) by July 1, 2023.
- Complete the Club/District MOU that TRF and our district require.

WHO SIGNS THE CLUB/DISTRICT MOU?

- Your president for next year: 2023-2024
- Your president for the year after next – 2024-2025.*
** If you do not have a president for 23-24, your next year's president can appoint a club officer as a proxy.*
- Snail mail the document to the District Grants Chair. Deadline for receipt is July 1, 2023. Originals are required.
- Upon successful completion of these qualification requirements, the club will be qualified for one Rotary year.

THE SEVEN AREAS OF FOCUS



FEATURES OF A DISTRICT GRANT

District Grants:

- Small-scale, short-term
- Local or international
- Aligned with mission & Areas of Focus
- Awarded annually

DISTRICT GRANT ACTIVITIES

- Include active Rotarian participation
- Adhere to stewardship guidelines
- Demonstrate cultural sensitivity
- Align with the Foundation's mission and the Areas of Focus

DISTRICT GRANT APPLICATIONS: TIMELINE

July 1, 2023:

Deadline for District Grant Applications – *limit one project application per club**

Deadline for MOU submission

Deadline for clubs to submit Foundation Goals

August, 2023:

Approval notices go out- Projects can be started

May 1, 2024:

Deadline for project completion

Deadline for Final Reports

DISTRICT GRANTS: APPLICATION FORM

- Project description
- How project will benefit the community
- How your club will participate in the project
- How the general public will know it is a Rotary project
- If there is a cooperating organization
- Project budget with costs and project income
- The maximum district request is **\$2,500**
- 2023-2024 Club President should sign application.
- Application due July 1, 2023.
- Do not start your project or purchase items until approval e-mail is received.



DISTRICT GRANTS: RESTRICTIONS

- A District grant cannot be a donation.
- It cannot fund the operations or expenses of another organization.
- It cannot cover expenses or purchases made before formal project approval is received.
- It cannot support fundraising efforts.
- A conflict of interest: a Rotarian member of a benefitting non-profit cannot participate as a committee member of a DG project or have control over the disbursement of the grant funds.
- Any changes to the project must be addressed with the District Grants Committee and approved by TRF.

WHAT MAKES A GOOD DISTRICT GRANT PROJECT?

- The project should meet your community's needs, help residents and improve lives.
- The project should get your whole club involved.
- Should include prospective members, neighbors, friends and family to help with your project.
- Should include a public relations/ social media campaign.

HOW ARE YOU GOING TO PLAN & DEVELOP YOUR PROJECT?

- A community assessment: what needs does your town have? Talk to town social workers, other local organizations, local schools
- Get your club members on board
- Put together a grant committee
- Choose a primary contact
- Support the Annual Fund Share this year

DISTRICT GRANT FINAL REPORT

1. Your project should be completed and final report submitted by May 1, 2024.
2. A district grant is a reimbursement grant.
3. Include copies of photos or press releases or any publicity for this project. **Remember to include in your PR that your project was supported by a Rotary Foundation District Grant.**
4. Have your club president sign and certify the report . Forward to the Grants Chair by May 1, 2024.
5. **A District grant is a reimbursement grant.**

GLOBAL GRANTS

- **A global grant is exactly what it means**
- **A grant that involves Rotarians on a global level**
- **Need a host rotary club (dist) that initiates the project for its local community with the added help of an international partner club(dist)**

A Global Grant is a collaborative effort between the **host club**, where the project takes place and the **international club** providing financial, technical and management support on an as needed basis with the added financial support from the **Rotary Foundation**.

A FEW WAYS THE IDEA FOR A GLOBAL GRANT COULD BE INITIATED:

- 1. A local care giver/ service organization approaches the local rotary club with a request for help to add/ expand the services to the community**

2. The local rotary club comes across a potential need in the community

3. A Rotarian from an international club comes across a potential need in a community while visiting that community

4. A non-profit providing services to a community in a developing country approaches the local Rotary Club for help to add/expand the services

- **Irrespective of the way the initial idea started, certain home work needs to be completed to determine if the project is eligible for the Global Grant**

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The key is to establish the community's critical needs thru discussions with the benefiting community and arriving at the best solution to meet those needs – that is what a community assessment is all about

COMMUNITY ASSESSMENT

- **The local Rotary Club partnering with the local community leaders/ administrative units/ care provides/ citizens, to identify the critical needs for the community and the available resources to meet those needs**

- **Solutions to the identified need/needs, along with the available resources to meet the needs will determine the scope for the Global Grant project**

- **The host club needs to identify an international partner club/ dist that is willing to be part of the global grant process**
- **The international partner club may participate in the community assessment process and lend their expertise to the process**

- TRF offers Community Assessment Tools for several types of **Community Assessments**.
(<https://my.rotary.org/en/take-action/apply-grants/global-grants>)
- You may request **Dist. Grant** if money is needed to complete the **community assessment**

- **Global Grants are designated for humanitarian projects focused on these seven areas:**

Basic Education

Disease Prevention/ Treatment

Maternal & Child Health

Water/ Sanitation/Hygiene (WASH)

Peace Building & Conflict Resolution

Community Development

Supporting the Environment

- The project should be within the seven areas of focus
- The budget should be \$30,000 or more
- Both the local Host Club and the International Partner Club **need to be qualified**

- **Local club must have the capacity to manage the project finances and the expertise to complete the project successfully**
- **International partner club may provide their expertise & support but the responsibility rests with the Host Club**
- **Up to 10% of the cost could be allocated for project management**

Long Term, sustainable projects with measurable benefits

The beneficiaries should have adequate resources to keep the project going for years ahead

PROJECT FUNDING REQUIREMENTS

- With your Partner Club, develop a project plan
- Establish a realistic budget
- Establish available funding from your Partner Club and District
- Decide on your club's cash contribution
- Contact your Dist. Rotary Foundation for available District Funds by submitting the **Dist. DDF Request Form**
- A minimum of 15% of THE FUNDING must come from outside the **host club** and **host district**
- All cash contributions will incur a 5% Administration fee

GLOBAL GRANTS

- **Open application process - Can be for multiple years**
- **Assess the locally available financial and technical resources**
- **Connect with the International Partner Club for additional resources**
- **Application is online...no paper processing**
- **Project funding will be a collaborative effort between:
The Clubs, Districts, *Supporting Organizations*,
Rotarians, Individuals and the Rotary Foundation**
- **Need to open a dedicated bank account**



MATCHING FUNDS

- **80% of the District funds will be matched by the Rotary Foundation's World Fund**
- **There is no minimum World Fund matching but the maximum is \$400,000**
- ***Get advice from Dist. Foundation Committee on raising additional funds if required***

FUNDING EXAMPLE

Partner	Cash Contribution	District Funds	TRF Match	Project Total
Host Club 5%	\$4,000 (\$200)		\$0	
Host District		\$8,000	\$6,400	
International Club 5%	\$4,000 (\$200)		\$0	
International District		\$10,000	\$8,000	
Totals	\$8,000 (\$400)	\$18,000	\$14,400	\$ 40,400

GLOBAL GRANTS

- For your benefit, establish contact with your District Foundation Committee as soon as you start considering a Global Grant Project as a Host Club or as an International Partner Club
- *Get guidance at an early stage. We could tell you if the project is eligible in the early stage itself*

- The Host club and the International Club need to identify a Primary Contact from both clubs. The Primary Contacts have complete responsibility to carry thru the **Application Process, Project Implementation** and **Progress & Final Reporting** to the Rotary Foundation.

GLOBAL GRANT SPONSOR CLUB ROLES

Host Club	International Club
<p>Initiates the Project</p> <p>Conduct a Community Assessment</p> <p>Manage Project Implementation and budget</p> <p>Provide Local Assistance and Support</p> <p>Receives and Manages Funds</p> <p>Completes Progress Report in Grant Center</p> <p>Completes Final Report upon Project Completion in Grant Central</p>	<p>Provide Financial Assistance, Technical Assistance and Guidance</p> <p>Performs Project Tasks as necessary to help the Host Club</p> <p>Assist with Progress Report and Final report</p>
<p>BOTH CLUBS</p> <p>Develop a Project Plan</p> <p>Have Project Committees that Collaborate with each other</p> <p>Partner with a Cooperating Organization if needed</p>	

GLOBAL GRANT REPORTING

Upon Approval of Global Grant by TRF:

- **All the funds will be deposited to the club's dedicated bank account**
- **The Host Club must submit the Progress Report 12 months after funds are received**
- **And, every 12 months until project is completed**
- **Final report submitted within 2 months of project completion**
- **International Club may provide help as needed**

Global Grant Scholarships

- Our Dist is focused on the \$30,000 Dunn Family Endowed scholarship
- Graduate level studies in one of the Seven Areas of Focus
- We will help to identify an international partner club
- Residency in the Dist's geographical area is required
- Application deadline is May 1st.



Vocational Training Teams

- Train local professionals in one of the 7 areas of focus by sending a team of professionals to train them locally and bringing them here for further training to reinforce their knowledge

- If your club has an interest, contact us.*

STEWARDSHIP

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

1. Rotarian supervision
2. Financial records review
3. Oversight of funds
4. *Reporting irregularities*
5. Timely submission of reports

STEWARDSHIP: DOCUMENT RETENTION

- Provide access
- Retain for a minimum of five years
- Make copies



STEWARDSHIP:THE WHY



A donor who understands that funds were used in an appropriate and responsible manner is more likely to give to the Foundation again to support projects.

QUESTIONS?

**Type your questions into
the chat box.**

CONTACT INFORMATION/RESOURCES

Contact Information

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Eileen Rau ebrau@comcast.net

To download Grant Forms:

www.rotarydistrict7890.org

**Click on District Grants 2023-2024 in
left hand column.**

THANK YOU!

Thank You for Supporting The Rotary Foundation!

