

# WELCOME

PDG Bruce Lakin  
District Rotary Foundation Chair 2019/20



- ❖ **Introduction and Goals** PDG Bruce Lakin
- ❖ **TRF – The big Picture** Rob Byrne
- ❖ **Granting – ROI for Clubs** David Dean
- ❖ **BREAK**
- ❖ **Giving – priming the pump** PDG Bruce Lakin  
Gavin Ralston
- ❖ **Scholars – investing** PDG Pam Pritchard
- ❖ **Q&A** ALL

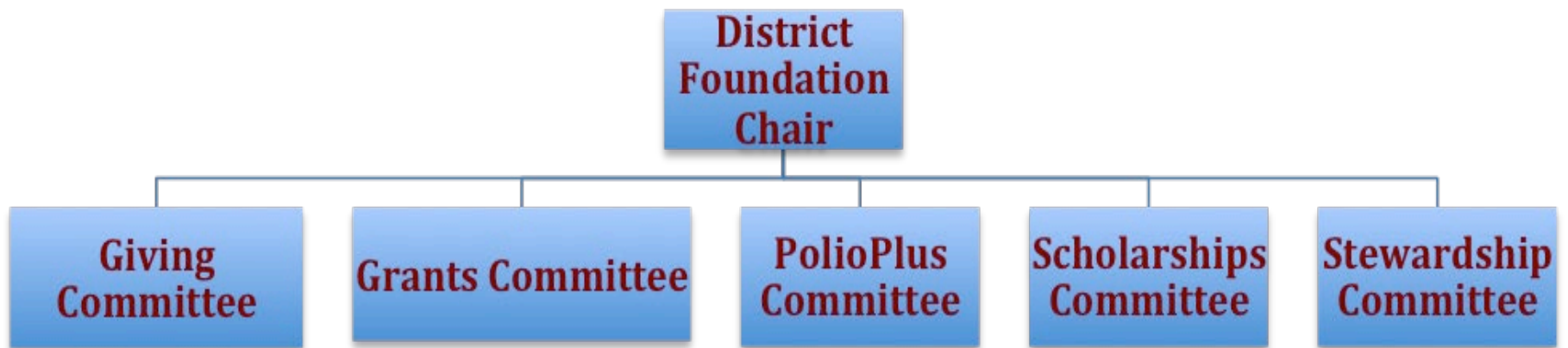


**Encourage you to support TRF  
in your role,  
in your Club,  
in your life**

# GOALS FOR THE YEAR

- ❖ **Every Club and Every Rotarian gives to the Rotary Foundation**
- ❖ **All available grants funding is utilized**
- ❖ **An outstanding scholar is selected**

# D9685 ROTARY FOUNDATION COMMITTEE



**And ...14 Rotary Foundation Ambassadors**



# D9685 ROTARY FOUNDATION AMBASSADORS

- ❖ **Zone Reps and Committee Members are all TRF Ambassadors**
- ❖ **Available to Clubs to advise, meet and present**
- ❖ **Contact me or contact Ambassador directly**



# FOCUS FOR THE YEAR

- ❖ **TRF content in all D9685 events and communications**
- ❖ **TRF Team is engaged with Club TRF Chair, Presidents & AGs**
- ❖ **TRF Team is available to all Clubs and all Rotarians**
- ❖ **Any myths or knowledge gaps are resolved**
- ❖ **Make use of available automation**



# District & Global Grants

David Dean  
District Grants Chair



The  
**Rotary**  
Foundation



# THE ROTARY FOUNDATION

## Our Foundation - Our Charity



# MANY ORGANISATIONS WANT YOUR MONEY!

- Australian Rotary Health
- ROMAC
- Interplast
- Shelterbox
- Disaster Aid
- Red Cross
- Salvos
- Other charities

Your  
money –  
they  
decide

Rotary Australia World  
Community Service  
(RAWCS)

Your  
money –  
you  
decide

Rotary Australia Benevolent  
Society (RABS)

The Rotary Foundation

Your  
project  
plus extra  
money

Which one can provide additional funds  
to help you with your project?

# FOUNDATION GRANTS AND PROGRAMS

## Grants

- District grants - Small grants administered by District
- Global grants - Large Grants administered by the TRF.  
Can be humanitarian, Vocational Training team, or graduate scholarship.
- Special Grants

## Programs

- Peace Fellows: fully funded by the TRF
- Polio Plus: Our No.1 Priority! – Separate Fund



# WHERE DOES THE GRANT MONEY COME FROM?

## Rotary Foundation Annual Fund

- Our donations returned to our District
- Three-year cycle
- In 2019-20, we receive the funds donated in 2016/17

**Total: \$US 380,000**

- 25% for District Grants
- 25% for District contribution to Global Grants
- 25% for Foundation matching of District contribution
- 25% for Foundation to match new club contributions to global grants



# DISTRICT GRANTS



Mosman Club has supported “Books in Homes” in providing books to infants and grade 1 pupils at a school in Mt Druitt



Gosford Club used a District grant to build two picnic shelters on the Gosford waterfront.

# DOUBLE THE IMPACT OF YOUR SERVICE PROJECT!

- **We will match your project dollar for dollar:**
  - Up to \$3000 for Australian projects
  - Up to \$6000 for International projects
- Over \$A100,000 in District Grant Funds to award
- Must be a new project – starting and ending in 2019/20
- One-page application form
- One Grant per club, unless funds are unused



# GRANT RULES – QUALIFICATIONS AND REPORTING

- Club officials must sign MOU
- Participate in the District Training
- Complete the Club Goals online
- First payment 50% of grant
- Final payment after project completed
- Grants must be completed in the Rotary year
- Reports due May 30<sup>th</sup>
- Reports must include good photos – high res please!
- 40+ clubs could have a District Grant in 2019-2020



# EXAMPLES: DISTRICT GRANTS FOR AUSTRALIAN PROJECTS

Club	Project
Springwood	Sensory Playground
Central Blue Mountains	Peace Park Signage
Mosman	Women's Refuge
Crows Nest	Marys House Refuge





## EXAMPLES: DISTRICT GRANTS FOR INTERNATIONAL PROJECTS

Club	Project
Pennant Hills	RYPEN East Timor
Belrose	Network Heaven Sri Lanka
E-club of Greater Sydney	Child Centre Kenya
Gosford North	Homes of Hope Fiji



# ONE-PAGE APPLICATION FORM

<b>Club Name:</b>	<b>Year:</b>	
<b>District Grant Guidelines:</b> <ul style="list-style-type: none"> <li>• <i>One grant per club</i></li> <li>• <i>All grants are to be completed by May</i></li> <li>• <i>Minimum grant \$500</i></li> <li>• <i>Maximum grant within Australia \$3,000, Internationally \$6,000, with club contributing at least equal amount of cash to match the district grant.</i></li> </ul> <p><i>50% of the payment will be made upon approval, and balance on receipt of a final report.</i></p>		
<b>Type (check one):</b> <b>DGA (in Australia) or</b> <b>DGI (International)</b>		
<b>Category</b> (Choose one from list below):		
1. Group Exchange 2. Community Development: General Services 3. Community Development: Renovation 4. Community Development: Disaster Recovery 5. Community Development: Volunteer Services	6. Education: General 7. Education: Literacy 8. Education: Scholarship 9. Education: Volunteer Services 10. Food/Agricultural: General 11. Food/Agric.: Volunteer Services	12. Health: General 13. Health: Disease 14. Health: Volunteer Services 15. Water: Supply/Access 16. Water: Sanitation 17. Water: Volunteer
<b>Title of Project:</b>  <b>Location of Project:</b>  <b>Brief description 50-200 words.</b> Must include the names of any organizations that the project is in any way supporting, or any cooperating organizations.		

# GRANT ASSESSMENT PROCESS

1. Did your club receive a grant in 2018/19?

**No: 5 points**

**Yes: 0 points**

2. Does your club support the Rotary Foundation Annual Fund in 2018/19?

**1 point per \$25 per capita as of 31 May, up to 10 points**

3. Are club members actively involved in the project?

**10 points if the project is solely organised and delivered by the club,**

**5 points if the club is actively participating with another organisation,**

**0 points if the club is simply writing a cheque to another organization**

4. Is your application complete by 30 June?

**10 points if the club's application is received, and all mandatory requirements (Attendance at District Assembly, completion of Giving goals on line, MoU signed and returned) are completed by 30 June.**

**0 points if any items are missing**

**Maximum Score: 35 points**

**Grants will be ranked and approved until all funds are allocated**

# GLOBAL GRANTS



Norwest Sunrise worked with a Club in Bolivia to provide heart surgery training by Australian doctors for \$US 75,000



The Hills Kellyville Rotary Club partnered with a Club in India to obtain a eye imaging system for Westmead Children's Hospital, worth \$US 116,000

# TRIPLE THE IMPACT OF YOUR LARGER PROJECT!

- **About \$100,000 in new District Funds available in 2019/20**
- **Projects must be at least \$US 30,000 (up to \$US 200,000)**
- **D9685 can match your project dollar for dollar:**
  - Up to \$US 8,000
  - World Fund matches your club 50% and matches District 100%
  - Your \$US 10,000 club project becomes \$US 31,000
- **Requires Club or District in another Country**
- **International Partner must contribute at least 30%**
- **Must be in an Area of Focus of the Foundation**



# ROTARY CLUBS, PARTNERS, AND CO-OPERATING ORGANISATIONS

- Must involve two countries – Host and International
- Host club is not required to put in any cash, but it is recommended they put something towards the project
- Ideally the Host District will contribute DDF
- Involve other clubs in this district and the host district
- The project must not be started until the grant is approved
- Check conflict of interest rules – re suppliers, partners etc
- Partners will need to sign a MOU
- Cooperating Organisations – no TRF match



# 7 GLOBAL GRANTS APPROVED SO FAR THIS YEAR

Grant Number ↕	Grant Title ↕	Date Approved ↕
<a href="#">GG1982470</a>	MOBILE MEDICARE UNIT	06/03/2019
<a href="#">GG1863592</a>	Rotary Teacher Training Project in Kathmandu	11/02/2019
<a href="#">GG1874341</a>	Dialysis Centres at Bhadrak and Berhampur	07/01/2019
<a href="#">GG1979344</a>	Reduction of Cataract Blindness in Indgent (poor) communities in Isab...	07/11/2018
<a href="#">GG1865041</a>	WinS 2017-18 Madras Coromandel	06/11/2018
<a href="#">GG1875447</a>	Provision of Water and Sanitary Facilities for two Schools in Port Harco...	02/11/2018
<a href="#">GG1870411</a>	Oecusse Sustainable Villages	25/09/2018



# AREAS OF FOCUS



Peace and conflict prevention/resolution



Disease prevention and treatment



Water and sanitation



Maternal and child health



Basic education and literacy

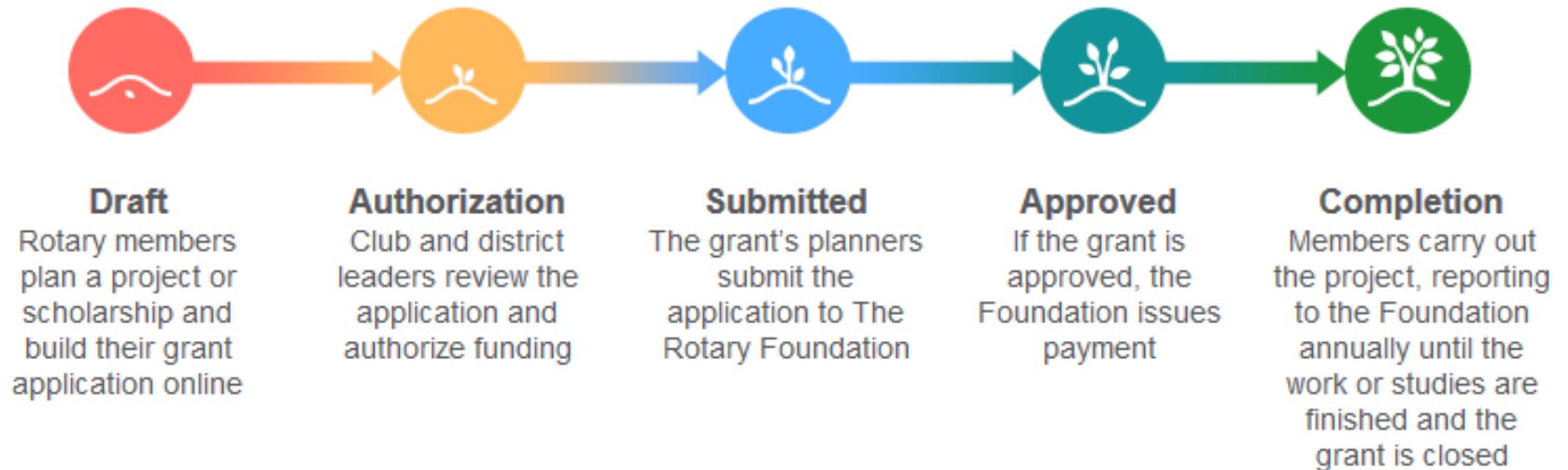


Economic and community development



# GLOBAL GRANT LIFECYCLE – ONE TO TWO YEARS!

## The lifecycle of a Rotary grant



# SUSTAINABILITY

For Rotary, sustainability means providing long-term solutions to community problems that community members themselves can support after the grant funding ends.



## Start with the community

Identify a need and develop a solution that builds on community strengths and aligns with local values and culture.

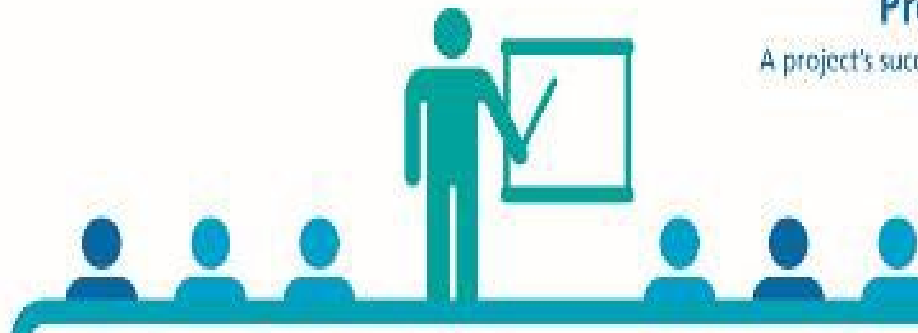
## Encourage local ownership

Identify key community members who can help pioneer lasting improvements.



## Provide training

A project's success depends on people.



## Buy local

Purchase equipment and technology from local sources.



## Find local funding

Get local funding through governments, hospitals, companies, and other organizations.



## Measure your success

Develop clear and measurable project outcomes and determine how you will collect your data.



# NEW REQUIREMENTS FOR GRANT APPLICATIONS

## Community Assessments Required From 1 July 2018

- All Humanitarian and VTT projects
- Results must be included in the application
- Tools available to evaluate needs – surveys, interviews, focus groups
- District grants could be used to do assessment

Global grant applications for projects requesting between US\$50,001 and \$100,000 from the World Fund will receive a technical review and interim site visit by The Rotary Foundation Cadre of Technical Advisers.



# MEMORANDUM OF UNDERSTANDING IMPORTANT



## MEMORANDUM OF UNDERSTANDING

**The Rotary Foundation and Rotary Club of:** \_\_\_\_\_ **Year:** \_\_\_\_\_

### 1. Club Qualification

To participate in Rotary Foundation global, district and packaged grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF) and to send at least one club member to the district's grant management seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in Rotary Foundation district grants. By completing these requirements, the club becomes qualified and eligible to participate in the TRF grant program.

- a. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.
- b. To maintain qualified status, the club must comply with this MOU, any additional district requirements, and all applicable TRF policies.

c. A separate account should be opened for each club-sponsored grant, and the name of the account should clearly identify its use for grant funds. (Global and packaged grants only)

d. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.

e. Bank statements must be available to support receipt and use of TRF grant funds.

f. The club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.

### 4. Report on Use of Grant Funds

The club must adhere to all TRF reporting requirements. Grant reporting is a key aspect of grant management and stewardship, as it informs TRF of the grant's progress and how funds are spent.

**Note: Please read the MOU carefully and make sure your club will comply! Our District funding depends on EVERY CLUB doing the right thing...**



# CLUB GOAL FOR ROTARY FOUNDATION

Log in <https://www.rotary.org>

1



My Rotary

2

## My Club Snapshot

Club Name

E-Club of Greater Sydney

Rotary Club Central

[View Club Goals >](#)

Click on View Club Goals

3



Dashboard



Goal Center

Select "Goal Center" in Lefthand Menu



# ENTER YOUR CLUB'S GOAL FOR THE ANNUAL FUND

4

Enter your club's fund raising goal for Annual Fund contributions in 2019/20

Rotary Club of **E-Club of Greater Sydney**

0 OF 0 ACHIEVEMENT

< 2018-19 >

PRINT

Members & Engagement

Rotary Foundation Giving

Service

Young Leaders

Public Image

Rotary Citation

All

✓ SAVE

CANCEL

Which goals will your club track this year? Browse goals by category and select only those you plan to pursue. Then save.

Sort selected goals ▼

**Annual Fund contributions**

> [Show goal details and history](#)

ACHIEVEMENT

-

OF

GOAL

-

SELECT GOAL

☐

USD  
As Of 18-Apr-18

Enter Goal Value

Note: Your current or incoming President, Secretary or Treasurer may need to do this

Rotary  
District 9685



# EVERYTHING ON THE ROTARY.ORG WEBSITE

Exchange Ideas

Take Action

Learning & Reference

Manage

The Rotary Foundation

News & Media

Member

## Apply for Grants

District Grants

Global Grants

> [Grant Center](#)

## Give

Ways to Give

Planned Giving

Donor Recognition

## About

Foundation Centennial

Foundation Reports

History

## Rotary Grant Center

Welcome to Rotary grants! As Rotary members, we contribute our skills, expertise, and resources to solve some of the world's most serious problems. From providing clean water in local communities to promoting peace worldwide, Rotary grants can bring your project ideas to life.



# EASY TO GET STARTED

## Apply Now

Begin the grant application only after your club or district and partners have finalized the project plan and you've contacted your district about your project's need for funding. Answer every question clearly and concisely. Your regional grants officer will work with you to make any changes your application needs in order to meet grant criteria.

Choose the type of grant you're applying for:

Global Grant



Let's begin!



# APPLICATION IS ONLINE

## Global Grant Application

All fields are required unless noted as "optional".

### Step 1: Basic Information

Enter some basic information, and then we'll give your application a number.

**What's the name of your project?**

100/100 characters



# KEYS TO SUCCESSFUL APPLICATION

- Reliable international partner club / personal contacts
- Sustainability of the project over many years
- Anticipate skeptical review of the application
- Ask for help early and often
  - David Dean 0412 798 526 [djhdean@gmail.com](mailto:djhdean@gmail.com)
  - TRF Liaison Person – Stephen Sundstrom
- **Patience !**



# REASONS FOR APPLICATIONS TO BE REJECTED

- Project already started
- Insufficient time
- Host District or Club will not Authorise
- Prohibited country
- Insufficient funds
- Insufficient sustainability
- Insufficient measurement
- Lack of real community needs assessment



# BOTTOM LINE

- You can triple your funds using a Global Grant
- Our District is very successful in obtaining grants
- However, it takes time and careful 'grantsmanship'
- We can help you!



# A 10 Minute Break !



# GIVING Refresher

We have to continue priming the pump

It is simple...

**Personal + Club Giving = Granting**

It is a **Force Multiplier** for your projects  
and doing good in the world!

# GIVING Refresher

**Centurion + EREY**



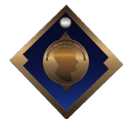
**Paul Harris Fellow Recognition**



**Paul Harris Society**



**Major Donor**



■ **Benefactor**



■ **Bequest Society**



■ **Club Major Giving Awards – NEW !!!!!**





# GIVING Refresher

## Centurion + EREY



**Centurion = AUD 100, Every Rotarian Every Year = USD 100 pa**

**Difficulty with reporting, recognizing and renewing**

**Consideration of**

**Annual Centurion Day ...during Foundation Month?**

**Sticker versus Pin ?**

**Club donation funded by CENTURION levy on Members?**

**Your opinion please.....**

# GIVING Refresher

## Paul Harris Fellow Recognition



**PHF = USD 1000 by Rotarian or Club**

**PHF points accumulate**

**Consideration of**

**Confirmation of Club points credit**

**Use of Club PHF points for Community recognition**

**Continued use of Club points to recognize worthy Members and Club Presidents**

# GIVING Refresher

## Paul Harris Society



**PHS = USD 1000 pa**

**Consideration of  
Some D9685 specific PHS benefit (recognition, event?)  
Increase PHS awareness in Clubs**

## Major Donor



**Get there when you can....**

# GIVING Refresher

## Benefactor & Bequest Society



- **Benefactor = USD 1000 in your will**
- **Bequest society = larger amounts in your will**
- **Consideration of**
- **Awareness in Clubs...**
- **Everyone/most Rotarians in D9685 could afford USD1000**
- **From their estate without the Kids getting too mad about it!**



# GIVING Refresher

## Club Giving

Most Clubs give to TRF....Thank You  
Some Clubs give ZERO .... ?????

- Consideration of
- Set TRF Giving Goal on Rotary Club Central by end of May
- Get TRF Goal into Club Budget
- Treat TRF fundraising equally with other projects
- Nominate specific project to support TRF
- Consider making TRF donation in Foundation Month (Nov)



# GIVING Refresher

## Club Major Giving Awards – NEW !!!!!



Clubs are recognized for 100% EREY, PHF (ie personal giving)  
But not for Club Giving

Consideration of  
Specific D9685 recognition of Club Giving  
Awards for Major Giving  
in AUD per Capita and for Total AUD  
Presented at D9685 Changeover

Your opinion please.....



# END POLIO NOW



# SCHOLARSHIPS

PDG Pam Pritchard  
District Scholarships Chair





# GLOBAL GRANT SCHOLARSHIPS

*Through scholarship grants Rotarians can support future leaders in fields related to their areas of focus.*

## **US \$30,000 DISTRICT SCHOLARSHIP FOR 2019-20**

For overseas study at a post graduate level for one to four years

Due 31<sup>st</sup> March 2020

### **Criteria**

Aligned to an area of focus

Excellent leadership skills

Success in his or her academic field or vocation

Well defined and realistic goals

Sincerity about maintaining a lifelong relationship with Rotary

## GLOBAL GRANT SCHOLAR

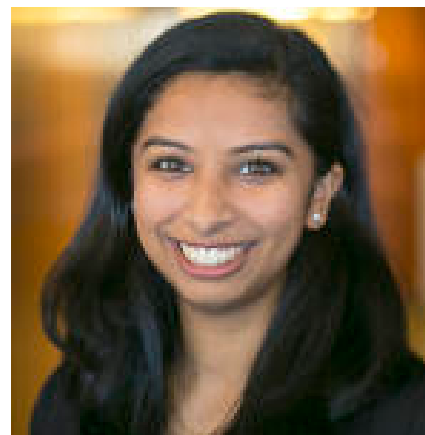
**Arthi Sridharan** is our Global Grant Scholar for 2019.

She is a solicitor and is studying for her Master of Law at Columbia University New York. Her sponsor club is the Rotary Club of Ryde and her host club the Rotary Club of Pleasantville just outside New York proper.

Currently Aarthi is working for King and Wood Mallesons where she specialises in competition and consumer law.

She has worked as a Migration Agent supporting refugees in preparing visa applications and accompanying them to interviews with the department of Immigration and Border protection.

Much of her work is pro bono



# PEACE FELLOWSHIPS

***Through training, practice and global networking, the Rotary Peace Centres Program develops leaders who become catalysts for peace and conflict resolution.***

AN online application is to be completed by the applicant,  
due May 31, endorsement by District July 1

## **TWO YEAR MASTERS DEGREE**

Average cost to the Foundation US\$80,000

### **Criteria**

Bachelor's Degree and related experience  
Commitment to International Understanding and Peace  
Excellent Leadership Skills



## Criteria

- Five years of related full time work or volunteer experience
- Strong academic background
- Commitment to International Understanding and Peace

Patricia Garcia, Peace Fellow  
graduated April 6, 2017 from  
Chulalongkorn University Bangkok

## PEACE FELLOW

- Our Peace Fellow for 2016-17 was Patricia Garcia OAM, who completed her three months of study at the Peace Centre at Chulalongkorn University in Bangkok. The 22 Fellows are hosted by the Rotary Club of Bangkok and other Bangkok clubs.
- Patricia is a highly respected humanitarian and human rights advocate who has worked in war zones for over 20 years (Afghanistan, Sudan, Burma) and has worked for many global NGOs, managing programs with responsibility for emergency and post conflict recovery.



**QUESTIONS ????**

**And**

**THANK YOU**

