



District 5450

Grants Club Qualification Seminar for 2017-2018

January 2017

Grants Club Qualification Seminar for 2017-2018

Welcome

Bill Downes
District Governor
2016-17

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The Rotary Foundation

Gail Lehrmann
District Rotary Foundation Chair

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The Rotary Foundation

- All Rotary Grants depend on contributions made to the Rotary Foundation
- Your contributions three years ago provide the District Matching Funds for Rotary Grants
- Without your support of the Foundation—we wouldn't be here today

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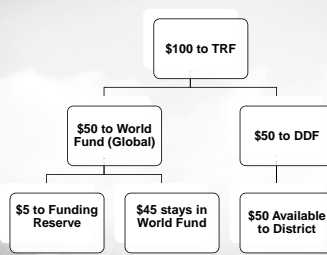
The Rotary Foundation

Types of Giving

- EREY (Every Rotarian Every Year)
- Paul Harris Fellow
 - Give \$1,000 over any period of time
- Paul Harris Society
 - Sign up and give \$1,000 (or more) annually

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Foundation Funding Model
Cash from Rotarian



```

graph TD
    A["$100 to TRF"] --> B["$50 to World Fund (Global)"]
    A --> C["$50 to DDF"]
    B --> D["$5 to Funding Reserve"]
    B --> E["$45 stays in World Fund"]
    C --> F["$50 Available to District"]
  
```

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Rotary Scholarships in District 5450

- Rotary Scholarships
- Peace Scholarships
- Temple Buell Scholarship

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What can you do to Support Rotary Scholarships

- Identify & sponsor scholar candidates
- Publicize the scholarships available
- Become the Program Chair for your club
- Act as a mentor for a Scholar

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Club Qualification Requirements

Hugh Radke
Club Qualification Chair

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Qualification Requirements

- Grant management seminar—grant champions should attend
- Club memorandum of understanding: understand this document
- **Club** current on IRS filings
- All Grant Reporting Current

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Additional Requirements

Club must meet, in previous Rotary year, minimum \$50 per capita giving to TRF

- Giving to Annual Fund only
- Special rules for new/ Satellite Clubs
- Club can track through monthly District reports

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Qualification Trainings

- One large training this year
- Small regional trainings
- Check District website for locations and dates
- Want to include most clubs in the trainings
- Not just for qualification
- Also for collaboration

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Club Qualification Status

Club Name	Club 200		550 per Capita to		Delinquent Global/ Matchline Grant Rept	Delinquent District Grant Reports	Date Qualified
	Signed MOU 7/18-6/15	Attendance at Training	TSE in 2015-16 6/30/2016*	6/30/2016*			
Cravitz							7/20/17
Arvada Sunrise							8/20/16
Arvada							8/20/16
Aurora Fitzsimons							8/20/16
Aurora Gateway							8/20/16
Aurora Southlands							8/20/16
Boulder							8/20/16
Boulder Eastmonte							8/20/16
Boulder Valley							8/20/16
Broomfield Mountain							8/20/16
Broomfield							8/20/16
Broomfield Crossing							8/20/16
Brush							8/20/16
Carleton Valley							8/20/16
Castle Pines							8/20/16
Castle Rock							8/20/16
Castle Rock High House							8/20/16
Centennial							8/20/16
Clear Creek 2000							8/20/16
Commerce City							8/20/16
Conley							8/20/16

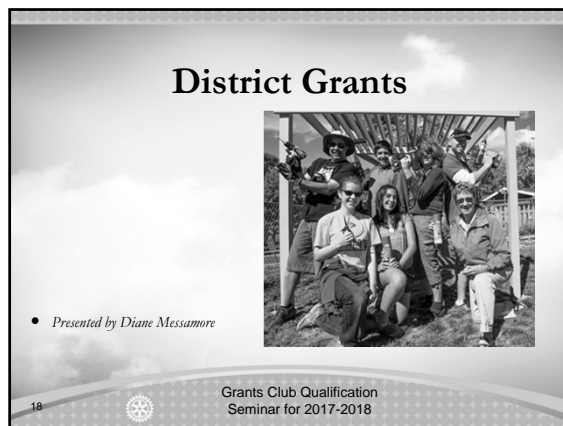
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- ### Terms of Qualification
- Valid for one year
 - Club responsibility for grant funds
 - Disclose conflicts of interest
 - Cooperate with all audits
 - Use grant funds properly
 - Implement the club MOU
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- ### Stewardship—MOU
- Stewardship is the responsible management and oversight of grant funds, including:
- Standard business practices
 - Rotarian supervision
 - Financial records review
 - Oversight of funds
 - Reporting of irregularities
 - Timely submission of reports
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- ### Maintaining Qualification
- Follow terms of club MOU
 - Appoint club member/committee to manage club qualification
 - Fully implement stewardship practices to prevent misuse of funds
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- ### Club Qualification Chair
- Hugh Radke
 - Smoky Hill Rotary
 - Business: 303-268-2149
 - Home: 303-741-5739
 - E-mail hradke@tymeins.com
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District 5450 District Grants

**Club initiated and hands on
short-term Rotary projects
that benefit
underserved groups of people**

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Boulder Flatirons and Attention Homes



Mission: Attention Homes provides life-changing resources for youth in crisis.






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2 District Grants

The first one provided supplies to street youth
The second one built their Technology Center



We

- cook and deliver food
- sponsor their Gala
- serve on boards and committee

They

- advertise our support
- contribute to our annual SPARK event
- provide an opportunity to partner with Boulder Valley

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District Grants

- **Grant sponsor must be qualified**
- **Clubs can sponsor either local or international grants—funding limits separate for each**
- **Satellite Clubs can sponsor grants, based on parent Club status**

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District Grants Requirements

- **Hands on participation by sponsoring Clubs**
- **projects that meet identified community needs**
- **Goals that are specific and measurable**
- **Emphasis on new projects, not long term maintenance**

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Grant Requirements

International District Grants

- **We encourage pilot projects for a future Global Grant**
- **D5450 Rotarians (or partner Rotarians in country) actively participate at the project site**
- **D5450 Club has full responsibility for Grant implementation**

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Training

- January 21 is the large grant training.
- Smaller grant trainings available to anyone:
 - Grand Lake February 15
 - Parker February 18
 - Three additional trainings outside Denver
 - Denver in the spring

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District Grant Limitations

Not eligible for funding:

- Microcredit
- Vocational travel teams
- Scholarships
- Youth Exchange, RYLA, etc.
- Building construction

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Effective January 1, 2017

- Higher maximum DDF per Club
- \$3,500 total DDF for each Club
- Maximum DDF per project:
 - \$3,500 with one participating club
 - \$4,500 with two participating clubs
 - \$6,000 with three or more participating clubs
- Introduce concept of "Sweat Equity"

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Effective January 1, 2017

- Higher maximum DDF limits apply immediately for grants not yet approved.
- If club has used maximum, may apply for another grant or contribute additional \$500 DDF to another club's District Grant

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New Concept -Sweat Equity

- DDF match due to hands-on participation--without cash contribution
- \$500 DDF credited for a Rotary Club's members actively engaged in another Club's District Grant implementation
- Not available to clubs that have used DDF maximum
- Only one \$500 per club, 2 per District Grant

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District Grant Application 2017-2018

- Grant window opens on May 8, 2017 for District Grants payable after July 1, 2017; submit application even if incomplete.
- Need estimate of total DDF for 2017-2018 spending budget.
- For questions, call one of the Grant advisors

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District Grant Application 2017-18

- **An application will be final when:**
 - All information is included in the application
 - The Club is qualified
 - All confirmations of cash and DDF are received.

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District Grant Application 2017-18

- Grants are awarded as first come first served
- We anticipate that the District will have sufficient funds for most grant applications
- If insufficient DDF for all grants, awards will be pro-rata for applications received the month when DDF runs out

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District Grant Applications

- Lead Club need not be qualified when submitting draft
- Grant awards announcements start in mid July

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District Grant Reporting

- Report required 2 months after completion; no later than April 30, 2018
- Must report any implementation delays
- No new grant if club is late in reporting.

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District Grant Reporting

- What was accomplished?
- How many Rotarians participated?
 - what did they do?
 - how many hours did they spend?
- If sweat equity provided DDF
 - Identify Club and what their members did

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District Grant Reporting

- Spending and funding summary
- Provide copies of all receipts
- If Rotarians spent funds bank statements are not required.
- If another organization spent funds, provide bank statements and letter from organization specifying money spent as application described.

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District Grant Reporting

- Documentation on how vendors were chosen and equipment identified
- Rotary signage and branding

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A Successful District Grant

- Has active Rotarian involvement
- Is a collaboration with the community and beneficiaries
- Has good documentation
- Is part of a long-term relationship with the beneficiary

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For More Information

- Check the District website
- Or call one of us:
 - Diane (303) 910-9355
 - Kam Breitenbach (303) 841-7368
 - Carolyn (303) 589-7599

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Thank you

Let's Take a Break

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Global Grants

Presented by Carolyn Schrader

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Global Grants

**Sustainable Rotary projects
that benefit
underserved groups of people**

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Global Grants

- ◆ **Preparation and Planning**
- ◆ **Funding**
- ◆ **Project Development**
- ◆ **Grant Writing**
- ◆ **Administration and Reporting**
- ◆ **Publicity**

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Global Grants

- ◆ **Preparation and Planning**

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Global Grants

- **Partnership of 2 Clubs**
- **Host Club Responsibilities**
 - **Likely Manage funds**
 - **Oversee project**
 - **Keep Int'l Club informed**
- **Choose your Host Partner well**

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Global Grants

- **Host Club Must Be Qualified**
 - **Host District must be qualified—ask RI**
 - **District manages Club qualification**
 - **Ask RI for contact info for District Rotary Foundation Chair (DRFC)**
 - **Contact DRFC to determine if District Club is qualified**

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Needs Assessment

- **Host Club should conduct assessment**
- **Include the community in the planning**
- **Choose a project that is doable and eligible for Rotary funds**
- **Evaluate community resources and integrate them in the project**

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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

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Global Grants

- Cooperating Organization
- Not a vendor
- Responsibilities
 - Necessary to implementation
 - Works side by side
 - Understands “Rotary” Project

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Global Grants

- ◆ Preparation and Planning
- ◆ Funding

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DDF for Global Grants

- \$15,000 maximum DDF for each Club
- Maximum per project:
 - \$15,000 if one Club;
 - \$20,000 if two Clubs, and
 - \$25,000 for three or more Clubs

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Global Grant Financing

- DDF matched 100% from TRF
- Cash matched 50% from TRF
- Non-Rotarians also matched by TRF
- Up to a 3 ½ to 1 match
- Minimum project: \$35,000

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Minimum Budget

Project: Economic & Community Development

▪ 5450 Clubs Funding	\$15,000
▪ Host Club Funding	\$ 0
▪ District Match (DDF)	\$15,000
▪ Rotary Match	<u>\$22,500</u>
▪ Total Project	\$52,500

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Global Grants

- ◆ Preparation and Planning
- ◆ Funding
- ◆ Project Development

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Project Development

- Implementation committee with responsibilities
- Disclose potential conflicts of interest
- Develop an implementation plan
- Create a budget
- Establish a document retention plan

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Conflict of Interest

- **Exists when a Rotarian benefits financially or personally from a grant**
- **Benefit can be direct (the Rotarian benefits) or indirect (an associate of the Rotarian benefits)**

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Setting Goals

- Measurable
- Sustainable
- Qualitative (descriptive)
- Quantitative (numeric)
- Identify baseline data source

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Sustainability

Sustainable projects have continued impact after the funds are spent. They:

- Meet community needs
- Develop community ownership of the project
- Make optimal use of local resources
- Increase capacity in assets and knowledge

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Sustainability Questions

- What do you need and how can we help you?
- What is necessary to meet the need?
 - What can you do?
- How can we make it last
 - New skills?
 - Ways to generate income to support the project
 - Other resources?

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Creating a Budget

- Realistic
- Competitive bidding
- Balance cost and quality
- Will need pro formas for large expenditures
- Work with local Rotary Club to get bids

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Rotary Budget Limits

- 3% for administration
- 10% contingency
- 10% for project manager
- 10% for measurement
- Up to \$500 for project signage

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Setting Up Grant Account

- RI prefers Grant Account in project country
- Need strong argument for keeping funds in the US
- International Club can still be involved in overseeing payments
- Funds must be under Club control

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Global Grants

- ◆ Preparation and Planning
- ◆ Funding
- ◆ Project Development
- ◆ Grant Writing

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Grant Writing

- Global Grant applications are submitted online
- District 5450 requests a Pre-Application for review
- We will work with you to meet TRF requirements

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Applying for Global Grants

- Online application
- Rolling deadline
- Project Rotarians must be identified
- Minimum budget of US \$35,000

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Global Grant Application

- Identify community needs
 - Reference community assessment
- Describe activities and outcomes
- Connect project to an area of focus
- Show how Rotarians will be involved

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Global Grant Application

- Detailed plan and budget
- Do not show DDF until District approves amount of DDF
- How activity is sustainable
- How outcomes will be measured

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Global Grant Application

- Contact RI Grant Advisor about any concerns
- Get written documentation of all D5450 Clubs' cash and DDF
- Decide whether contributions will go to TRF or direct to the Grant Account

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Global Grant Application

- **Cash payments made to TRF:**
 - 5% administrative charge
 - Donor will get Paul Harris credit
 - Longer processing time
- **Cash payments direct to Grant Account:**
 - No processing fee
 - No Paul Harris credit
 - Likely wire fees/ currency charges

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What appears on Grant Application

Club commitment to Grant	\$100
Administrative Charge	\$ 5
Total Club Payment	\$105

If Contributions are paid direct to Grant Project Account, the 5% charge is eliminated

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Global Grant Application

Once application is submitted

- RI Grant Advisor will communicate with sponsors on points of clarity or required changes
- Applications go through double review at RI
- Sustainability is key concern

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Global Grants

- ◆ **Preparation and Planning**
- ◆ **Funding**
- ◆ **Project Development**
- ◆ **Grant Writing**
- ◆ **Administration and Reporting**

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Finances and Recordkeeping

- Separate Club Bank account for each grant
- Receipts and bank statements
- Detailed ledger
- 5 year document retention; can be electronic
- Accessible to Club members

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Global Grant Reports

- On line reporting
- Progress reports
 - First due within 12 months of payment
 - Prudent to accelerate first report
 - Every 12 months until completed
- Show spending for receipted expenses
- Bank statements required

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Global Grants

- ◆ **Preparation and Planning**
- ◆ **Funding**
- ◆ **Project Development**
- ◆ **Grant Writing**
- ◆ **Administration and Reporting**
- ◆ **Publicity**

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Global Grants Publicity

- Tell your story
 - Within your Club
 - In the District
 - To your friends
- Rotary can do wonderful things
- Let the world know

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Global Grants

- Material on District website
 - Rotary5450.org under Grants
- More information on Rotary website www.rotary.org
 - In *My Rotary*
 - Under *The Rotary Foundation*, or
 - *Learning and Reference*

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