



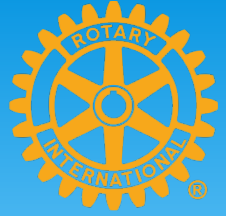
Foundation Grants Seminar

Module 1 Purpose and Types of Rotary Grants

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Objectives of this Module

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1. Explain the purpose of The Rotary Foundation and Foundation grants.
2. Learn how The Rotary Foundation is funded.
3. Learn how the District determines how to spend its Foundation funding (District Designated Funds).
4. Understand differences and similarities between the two kinds of Rotary Foundation grants.
5. Learn how your Rotary club can participate in Rotary Foundation grant-making.

What is The Rotary Foundation?



- It's the 501(c)3 that funds all the good work of Rotary beyond the club level.
- It's entirely funded by **donations** to The Rotary Foundation (not from District or RI dues).
- We have an obligation to see that the money is well spent.

Why is it important?

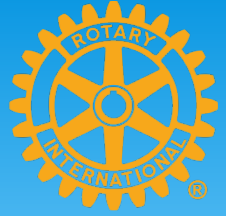


The Rotary Foundation and Foundation grant-making is the backbone of how Rotary does humanitarian work across the globe.

- Grant-making puts a “face” on the work of Rotary and The Rotary Foundation
- Service is why people join and stay in Rotary
- Involvement in grants has been shown to increase club participation and feeds into increased Foundation giving

How are Rotary Foundation dollars raised?

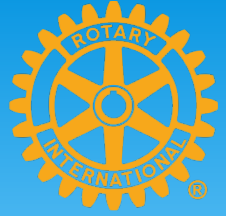
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1. **The Annual Fund** - all donations to the Annual Fund support humanitarian grant-making. All Rotarians are asked to give each year and donors are thanked by giving level:
 1. **Every Rotarian Every Year** - give at least \$25 annually
 2. **Sustaining Member** - give at least \$100 annually
 3. **Paul Harris Fellow** - give at least \$1000 over a lifetime
 4. **Paul Harris Society** - pledge and give \$1000 annually
 5. **Major Donors** - Rotarians or couples who give at least \$10,000 over a lifetime

How are Rotary Foundation dollars spent?

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2. **Polio Plus** - all donations to Polio Plus are spent immediately to help eliminate polio (currently receive 2-to-1 match from Gates Foundation).
3. **Rotary Peace Centers** - Money goes to support peace scholar program.
4. **Endowment** - earnings from the endowment support the World Fund and, currently, help pay for the Rotary Peace Centers. Donors who pledge planned giving to the endowment are **Benefactors**; those who pledge \$10,000 or more are **Bequest Society** members.

What is District DDF?



All of the money donated to the Annual Fund - Share, by Rotarians and clubs each Rotary year is retained by TRF in Evanston for 3 years.

At this point TRF deducts 5% of that total for administrative expenses. Then half of the remainder goes into the World Fund where TRF uses it for Global Grants and other Rotary programs.

The other half then comes back to us as District Designated Funds (DDF), half of it as a credit for us to match Global Grants and the other half as cash for us to spend on District Grants and our International Outreach program.

Let's Talk about Foundation Grants



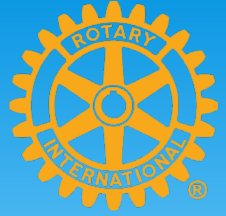
There are two kinds of Rotary Foundation Grants:

- **District Grants** - Based on the District's previous level of giving to The Rotary Foundation, funds are made available for clubs to spend to fulfill humanitarian needs.
- **Global Grants** - These humanitarian grants represent a partnership between two Rotary clubs in two countries/districts. Club cash is "matched" by the District and that District match is "matched" again by The Rotary Foundation to fund these grants.

You will learn more about each of these Grant types in future modules.

Global Grants and District Grants

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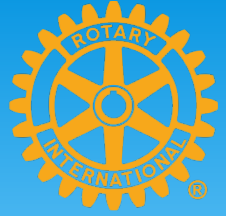


Similarities

1. Both grant types can take place locally OR internationally.
2. Both must be sustainable. This means:
 - Grants must be financially sustainable
 - Supplies should be sourced locally
 - Local people should be able to maintain the results of the project after Rotarians go home
3. Both involve \$ “matches” or contributions from the District (and in case of Global Grants from The Rotary Foundation).
4. Both require similar club qualifications, reporting and financial management (you will learn more about these later).

Global Grants and District Grants

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Global Grants, but not District Grants, must fall within one of Rotary's "Areas of Focus." Be sure to read the "Areas of Focus Policy Statements" for specifics. It's also important that grants NOT cover more than one Area of Focus. That's because each Area of Focus has specific requirements. The Areas of Focus are:

- Disease prevention and treatment**
- Water, sanitation and hygiene**
- Community economic development**
- Basic education and literacy**
- Maternal and child health**
- Peace building and conflict prevention**
- Protecting the Environment**

Global Grants and District Grants



Differences

- **Size** - District grants run between \$1000-\$4000 in total size; Global Grants start at \$30,000 (of which \$10,000 must be from clubs).
- **Partnership** - Global Grants require a partnership between two clubs in two different countries; District grants are stand-alone projects and may take place in a country without Rotary.
- **Community assessment and evaluation** - Global Grants **MUST** start with an assessment of community needs, measurable goals, and end with an evaluation of how well the grant has met those goals. This is not required of District grants.
- **Acceptance and Review** - District grants are reviewed by a District committee; final decision on Global Grants comes from The Rotary Foundation.

Global Grants and District Grants



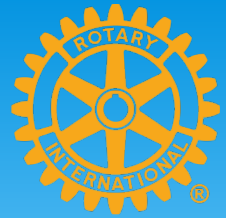
Qualification

Each year, District 7780 requires each club to “qualify” by doing six things:

- One member must take the Grants Management Seminar **this** year.
- Appoint a Club Foundation Chair and input his/her name into ClubRunner or otherwise inform the District.
- Establish a goal to support the Annual Fund on Rotary Club Central
- Club President-Elect along with either the club Vice President OR club Foundation Chair must sign and implement the MOU
- Be current with District and RI dues
- Be current with all District Grant, and Global Grants (if a host club) reporting and closeout requirements.

Global Grants and District Grants

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Each year, District 7780 requires each club involved in **District or Global** Grant-making to:

- Be “qualified” (see previous slide)
- Follow the terms of the MOU
- Appoint a club member/committee to manage club qualifications
- Fully implement stewardship practices to prevent misuse of funds
- Ensure that all reporting is done in a timely manner and detailed fashion

Rotary Foundation District Resources



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District Foundation page is found under
“Foundation and Grants” on www.rotary7780.org

