

# Foundation Grants Seminar

## Global Grants

**Dave Underhill**  
**Global Grants Coordinator**  
**Rotary District 7780**

**February 2021**

**Revised to reflect TRF changes announced 2/8/2021**

# Today's Objectives:



1. Learn how to apply for a Global Grant.
2. Learn how your grant application will be evaluated by The Rotary Foundation.
3. Gain an understanding of TRF match and District “match” amounts (changed from previous years).
4. Learn reporting and financial requirements.
5. Learn about the most recent (February 2021) changes to TRF matches

# Key Changes since last year:



1. TRF no longer matches club contributions to Global Grants, only DDF.
2. The TRF match to DDF drops to 80% effective July 1, 2021
3. Grants not approved by June 30, 2021 will need to have their financing model amended

# Key Concept: Host and International Clubs



1. Global Grants are a partnership between two or more clubs, in two or more countries
2. **HOST CLUB** is in-country where project is done (e.g. Guatemala water well) and **INTERNATIONAL PARTNER(S)** are typically funding partners and champions (7780 Clubs and perhaps others)
3. We can also be **HOST CLUBS** for project inside the US (e.g. Calais ME)



# Global Grant Definition and Requirements



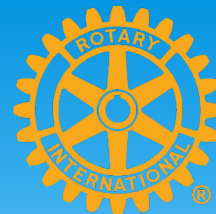
Long-term project with sustainable, measurable outcomes  
Must align with at least one of Rotary's seven Areas of Focus  
Multiple-year partnership of Rotary Clubs in two different countries.  
Global Grants must start with a **community assessment**, must make a **sustainable difference**, and that difference must be **measurable**.  
Must actively involve Rotarians and community members  
Minimum funding and budget at least \$30,000  
Must meet the TRF Terms and Conditions for grants.

# Examples of active Global Grants, District 7780



- Building a check dam in rural India (Sanford-Springvale)
- Covid-19 response in Zambia (South Berwick-Eliot)
- Educational support for Native American children rural Maine (York)(Host Club, partner in Canada)
- Neonatal care unit, Bulgaria (Yarmouth)
- Other 7780 clubs partnered in these examples
- Chart of current and pending Global Grants in our district at this link:
- <https://clubrunner.blob.core.windows.net/00000050088/en-ca/files/homepage/global-grants-update/Global-Grants-Update.pdf>

# How to Get Started



1. **Build a relationship with a Rotary Club near your proposed project. The success of your project will hinge on this relationship.**
2. Be sure that both your club and the in-country host club are grant-qualified (see next slide).
3. Make sure that your proposed project falls within the eligibility requirements of ONE Area of Focus (can be more than one but makes grant far more complex to get approved).
4. Understand the financial obligations of a Global Grant. Typically, it is necessary to raise \$10,000 in club cash (from one or more clubs) in order to reach the \$30,000 minimum.
5. Contact the District Global Grants Coordinator, Dave Underhill, [dave.underhill.nh@gmail.com](mailto:dave.underhill.nh@gmail.com), to discuss your grant idea
6. Log in to the Rotary.org grants center and begin a draft!

# Six Steps to Qualify Your Club (Same as District grants except for deadlines)



1. A minimum of one member must attend the grant management seminar this year (this online training, three modules).
2. Club must appoint a club Foundation chair and report name to district (usually, input his/her name into ClubRunner).
3. Club must establish a goal to support the Annual Fund on rotary.org's Rotary Club Central (ask your Assistant Governor if you are unclear about this)
4. Club President at the time grant is active, and either the Club President-elect **OR** Club Foundation Chair must sign and implement the Memorandum Of Understanding [MOU] (available on the Foundation drop-down tab on rotary7780.org). (Qualification deadline is “before the district team will OK submitting your draft”)
5. Club must be current with all District and RI dues
6. Club must be current with all Rotary Foundation grant reporting (for Global Grants this pertains to the host club)

# Community Needs Assessment

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1. **You MUST start with a community needs assessment! (Usually done by host club).** Talk to everyone, use local knowledge and available human assets, think long term. *Don't assume the solution until you've figured out the problem!*
2. **Remember that cultural biases may color your assessment**
3. **Make sure your needs assessment includes baseline metrics, so that later evaluation is possible.**
4. **Your solution must be impactful and solve the problem, not just chip away at it.** Rethink your annual service trip into a multi-year program that will bring about holistic change. This could involve a Vocational Training Team and **MUST** include knowledge transfer (teach local people to do the work).

# Sustainability

*Be sure your project is Sustainable*

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To test the sustainability of your project, ask yourself: *What will happen to the project after the Rotarians go away?* Sustainable projects all display the following characteristics:

1. **Community needs and strengths:** Projects involve collaboration from multiple participants
2. **Materials and Technology:** Projects use material that is locally sourced and can be replaced
3. **Funding:** Projects ensure that the project will continue after the Grants funding is expended
4. **Knowledge:** Projects involve skills transfer so that local people can continue the project after the Rotarians go away.
5. **Motivation:** Projects provide incentives for local ownership

# Monitoring and Metrics



Your project must have clear and measurable outcomes, and those outcomes must be tied to the community needs assessment that started off the project. Be sure you:

- Establish clear project goals and relevant baseline data
- Identify critical project measures and the method for collecting this information

# Rules for Cooperating Organization

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Many Global Grants involve a **Cooperating Organization**, that is, a non-Rotary organization or academic institution that provides expertise, infrastructure, advocacy, training, and education for the duration of the grant.

Cooperating Organizations should not be confused with **Beneficiaries**, which will receive the benefits of the grant. Nor should they be confused with **Vendors**, which supply materials for the grant.

Cooperating organizations must sign a Memorandum of Understanding, which must be included with the grant application



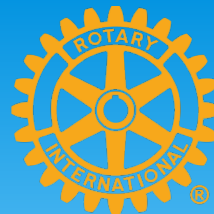
# Global Grant Requirements:

*Draft the application*

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- Grants are drafted and submitted online: [www.rotary.org/grants](http://www.rotary.org/grants).  
The grants application is NOT a paper document. It requires data entry in a specific order. There is a draft document version of this template in resource section for your off-line preparation.
- Be sure to answer the questions! It's human nature to talk around a tough question rather than answer it directly. Be specific!
- When you start the online draft, you get a GG number that follows your project through all stages of approval, funding and reporting. This also allows us to anticipate your request for DDF funding.
- **Don't forget there is a 5% administration surcharge in funding calculations! (See explanation in resource section)**



## District 7780 and TRF “matches” ***Changed from prior years!***

1. Clubs raise the base amount
2. District 7780’s Global Grant funds are then applied as follows, if funds are available:

First come first served based on the final submission for Governor’s approval

One club raises \$10K or less, district matches same amount

Two clubs raise \$15k or less, district matches same amount

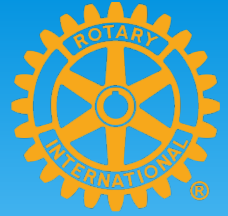
Three or more clubs up to \$20k (or more), district maximum match \$20k

Minimum club contribution \$500, all amounts before 5% surcharge

3. Grants center template helps you calculate TRF World Fund match  
**TRF match applies to DDF funding but not club contributions**

# District 7780 and TRF “matches”

## ***Specific Illustration***



Current fiscal year (2020-2021)

Single Club raises \$10,000

DDF from District in same amount if available, \$10,000

World Fund match to DDF if available, \$10,000

**Total funds=\$30,000**

Next fiscal year (2021-2022, and beyond)

Single Club raises \$12,000

DDF from District if available, \$10,000

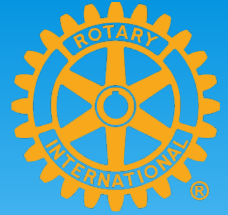
World Fund match to DDF if available at 80%, \$8,000

**Total funds = \$30,000**

*(Because WF match drops 2K, added money needed to raise 30k grant minimum)*

## District 7780 and TRF “matches” Why the changes?

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We have been so successful growing the Global Grant program that total grants have more than doubled since 2014

But we've only been able to increase SHARE fund contributions from Rotarians by 9% over the same period

We want to get more grants funded, but TRF needed to overcome an annual shortfall of nearly \$20M. These changes combined with others should make the program sustainable for years to come.

Everyone “gives a little” and the world gets a lot.

# Reporting and Financial Management

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Financial management is described in the MOU that is part of the club “qualification” process:

All Global Grants must have a separate bank account and a financial plan

Interim reports are due every six months until the project is finished and the grant is closed out with a final report.

# Rotary.org Grants Center

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[www.rotary.org](http://www.rotary.org) -- NOT the district website, not ClubRunner

Your login is for rotary.org, if you don't have one, set that up first

Screenshots that follow show you how to navigate to Grants Center:

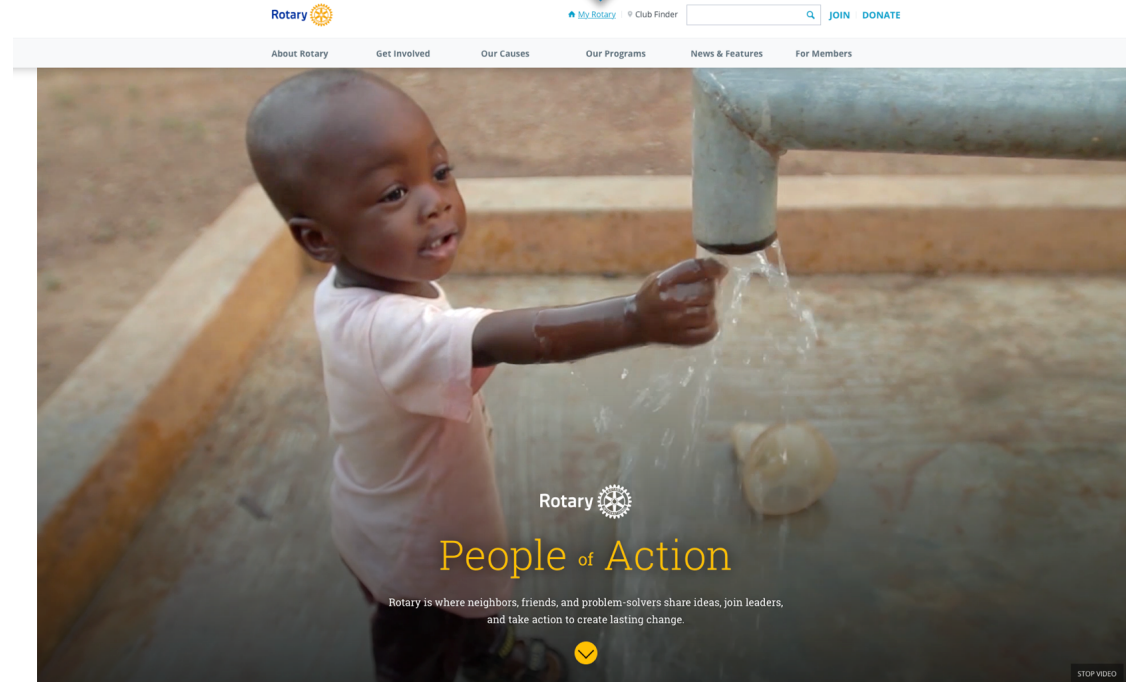
# Rotary.org Grants Center

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Enter the url: [www.rotary.org](http://www.rotary.org)

Click on “My Rotary” top of screen:



# Rotary.org Grants Center

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Click “Sign In” to My Rotary



The screenshot shows the "My Rotary" member dashboard. At the top, there's a dark blue header with the Rotary logo, "My Rotary" text, and links for "Rotary.org", "Club Finder", "Sign In", "Register", "JOIN", and "DONATE". Below the header is a navigation bar with links: "Exchange Ideas", "Take Action", "Learning & Reference", "Manage", "The Rotary Foundation", "News & Media", and "Member Center". The main content area is titled "My Rotary Member Dashboard" and includes a welcome message, a link to "Rotary.org" for non-members, and two prominent buttons: "SIGN IN TO MY ROTARY" and "REGISTER FOR AN ACCOUNT". Below this, there's a large image of two women shaking hands, with the text "Strategic thinking can help Rotary clubs grow" and a link to "Read more". To the right, there's a "Rotary Spotlight" section featuring a photo of two women in headscarves and a link to "Read more on our strategic plan".



# Rotary.org Grants Center


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Enter your log-in and password



This website uses cookies, by continuing you are agreeing to our [privacy policy](#). close X

Rotary  My Rotary Rotary.org Club Finder  JOIN DONATE

[Exchange Ideas](#) [Take Action](#) [Learning & Reference](#) [Manage](#) [The Rotary Foundation](#) [News & Media](#) [Member Center](#)

## My Rotary Member Dashboard

Welcome to My Rotary, a place for members of Rotary to access tools and information to make your membership experience better.


If you are not a member of Rotary, please visit our home page at [Rotary.org](#).

[SIGN IN TO MY ROTARY](#)

[REGISTER FOR AN ACCOUNT](#)


### Sign In

Sign-in Email \*

[Forgot email?](#) 

Password \*

[Forgot password?](#)

☒ Remember me 

[SIGN IN](#)


#### Why Create An Account?

Signing in to My Rotary gives you a customized experience and easier access to tools and information that are relevant to you.

Anyone can create an account and sign in. Existing Member Access users can re-register with their current user ID. For tips on registering and using the site, see our [website resources](#). For assistance, [contact us](#).

[CREATE ACCOUNT](#)

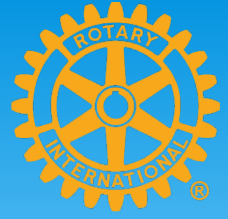
Strategic thinking  
Rotary members should always  
interesting. Quality

Spotlight  
  
...we see a world where people  
...take action to create lasting  
...across the globe, in our  
...unities, and in ourselves. [Read  
...our strategic plan >](#)

Featured Links — What's new —

# Rotary.org Grants Center

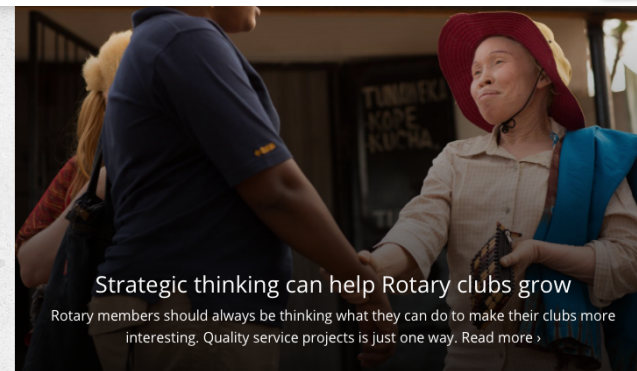
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Confirm you are logged in (white arrow) and click “The Rotary Foundation” (yellow arrow)



A screenshot of the my.rotary.org website. The top navigation bar includes links for Merrill, UBS Online Services, Washington Post, Boston Globe, Seacoast Online, Facebook, Rotary Intl, Home Page | District 7780, Portsmouth - Home Page, Login | SCORE, Boston.com, and Twitter. A cookie notice is displayed below the navigation bar. The main header features the Rotary logo, "My Rotary", and a search bar. Below the header is a menu with links: Exchange Ideas, Take Action, Learning &amp; Reference, Manage, The Rotary Foundation, News &amp; Media, and Member Center. The "The Rotary Foundation" link is highlighted with a yellow arrow. The main content area is divided into two columns: "Apply for Grants" (with links for District Grants, Global Grants, and Grant Center) and "Give" (with links for Ways to Give, Planned Giving, and Donor Recognition). To the right of the "Give" column are links for "About", "Foundation Reports", and "History".



My Club Snapshot

What's new



Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves. [Read more on our strategic plan >](#)



# Rotary.org Grants Center

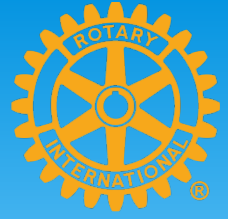


Now click “Grant Center” under the header “Apply for Grants”

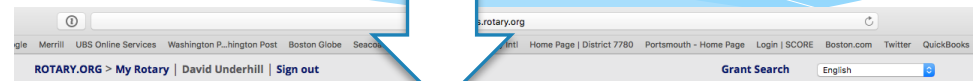
The screenshot shows the my.rotary.org website. At the top, there's a navigation bar with links like 'Merrill', 'UBS Online Services', 'Washington Post', 'Boston Globe', 'Seacoast Online', 'Facebook', 'Rotary Intl', 'Home Page | District 7780', 'Portsmouth - Home Page', 'Login | SCORE', 'Boston.com', and 'Twitter'. Below this is a cookie consent banner. The main header features the Rotary logo and 'My Rotary' text, along with a search bar and 'JOIN | DONATE' buttons. A secondary navigation bar lists categories: 'Exchange Ideas', 'Take Action', 'Learning & Reference', 'Manage', 'The Rotary Foundation', 'News & Media', and 'Member Center'. The 'Apply for Grants' section is highlighted, containing links for 'District Grants', 'Global Grants', and 'Grant Center'. A yellow arrow points to 'Grant Center'. Other sections include 'Give' (with links for 'Ways to Give', 'Planned Giving', and 'Donor Recognition') and 'About' (with links for 'Foundation Reports' and 'History'). Below the navigation, there's a large banner image of two people shaking hands, with the text 'Strategic thinking can help Rotary clubs grow' and a link to 'Read more'. To the right, there's a smaller image of two women in hijabs, with the text 'Together, we see a world where people unite and take action to create lasting change - across the globe, in our communities, and in ourselves. Read more on our strategic plan >'. At the bottom, there are two tabs: 'My Club Snapshot' and 'What's new'.

# Rotary.org Grants Center

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Select “Apply for Grant” or “My Grants”



**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.

Use the Rotary grants tool to apply for a grant, track its progress, report on it, and search for other grants in your district.

**Types of grants**

The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training teams. Here's an overview:

- Global grants** support large international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus. They range from \$15,000 to \$200,000.
- District grants** fund smaller-scale, short-term projects that address immediate needs in your community or abroad.
- Packaged grants** fund up to 10 scholarships each year for students in a master's program on water and sanitation at the UNESCO-IHE Institute for Water Education in Delft, Netherlands.

**The lifecycle of a Rotary grant**

```
graph LR; A[Draft] --> B[Authorization]; B --> C[Submitted]; C --> D[Approved]; D --> E[Completion];
```

- Draft**  
Rotary members plan a project or scholarship and build their grant application online
- Authorization**  
Club and district leaders review the application and authorize funding
- Submitted**  
The grant's planners submit the application to The Rotary Foundation
- Approved**  
If the grant is approved, the Foundation issues payment
- Completion**  
Members carry out the project, reporting to the Foundation annually until the work or studies are finished and the grant is closed

**District qualification**

Before applying for grants, district leaders agree to follow the stewardship requirements listed in the memorandum of understanding.

To apply for a grant, go to [Apply for a Grant page](#).

**Grant Resources**

Questions about the grant process? We're here to help, from getting you started to final steps.

- [Application Supplement for Microcredit Projects](#)
- [Areas of Focus Policy Statements](#)
- [Conflict of Interest Policy for Program Participants](#)
- [Cooperating Organization Memorandum of Understanding](#)
- [Global Grant Application Template](#)
- [Global Grant Calculator](#)
- [Global Grant Lifecycle](#)
- [Global Grant Monitoring and Evaluation Plan Supplement](#)
- [Global Grant Report Template](#)
- [Global Grant Scholarship Supplement](#)
- [Grant Travel](#)
- [Global Grants Community Assessment Results](#)
- [Guide to Global Grants](#)
- [Guidelines for Rotary Foundation-Funded Project Signage](#)
- [How to Use the Grant Center](#)

# Rotary.org Grants Center

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## Example of Grant Application

grants.rotary.org

Merrill UBS Online Services Washington Post Boston Globe Seacoast Online Facebook Rotary Intl Home Page | District 7780 Portsmouth Home Page Login | SCORE Boston.com Twitter QuickBk

Rotary Grants | My Grants | GG1870710 District Number: 7780 District Status: Qualified

### Global Grant Application

Healthy Kids Brighter Future #3

Ready to report?

Grant reporting is available once a project has been funded.

[Go to reports page](#)

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?**

Healthy Kids Brighter Future #3 69/100 characters

**What type of project are you planning?**  
Check all that apply. This will tell us what else we need to ask you.

☒ **A humanitarian project**  
Address community needs and produce sustainable, measurable outcomes

☐ **Vocational training**  
Build skills within a community by supporting a team of professionals that will travel abroad to train or learn from colleagues in the community they visit

☐ **A scholarship**  
Fund international graduate-level study by someone seeking a career within an area of focus

**Select the primary host and international contacts for this project.**

Name	Club	District	Sponsor	Role
Robert Gravino	Ipswich	7930	Club	International
John Kanenungo	Nkwazi	9210	Club	Host

[Exit](#) [Next](#)

#### Step 2: Committee Members ✓

#### Step 3: Project Overview ✓

#### GRANT INFORMATION

**GRANT NUMBER**  
GG1870710

**GRANT STATUS**  
Approved

**LAST ACTIVITY**  
14/02/2019

[Print application \(PDF\)](#)

#### Grant Resources

Questions about the grant process? We're here to help, from getting you started to final steps.

[Application Supplement for Microcredit Projects](#)

[Areas of Focus Policy Statements](#)

[Conflict of Interest Policy for Program Participants](#)

[Cooperating Organization Memorandum of Understanding](#)

[Global Grant Application Template](#)

[Global Grant Calculator](#)

[Global Grant Lifecycle](#)

[Global Grant Monitoring and Evaluation Plan Supplement](#)

[Global Grant Report Template](#)

[Global Grant Scholarship Supplement](#)

[Grant Travel](#)

[Global Grants Community Assessment Results](#)

[Guide to Global Grants](#)

[Guidelines for Rotary Foundation-Funded Project Signage](#)

[How to Use the Grant Center](#)

[Report Supplement for Microcredit](#)

# Rotary.org Grants Center

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## Example of Project Overview

grants.rotary.org

Merrill | UBS Online Services | Washington P...hington Post | Boston Globe | Seacoast Online | Facebook | Rotary Intl | Home Page | District 7780 | Portsmouth - Home Page | Login | SCORE | Boston.com | Twitter | Quick

ROTARY.ORG > My Rotary | David Underhill | Sign out

Grant Search English

Rotary Grant Center Home Apply for a Grant My Grants My Actions

Rotary Grants | My Grants | GG1870710 District Number: 7780 District Status: Qualified

### Global Grant Application

Healthy Kids Brighter Future #3

Ready to report?

Grant reporting is available once a project has been funded.

Go to reports page

All fields are required unless noted as "optional".

- Step 1: Basic Information ✓
- Step 2: Committee Members ✓
- Step 3: Project Overview ✓

Tell us a little about your project. What are the main objectives of the project, and who will benefit from it?

This grant's primary focus is Disease Prevention & Treatment. We propose to implement a school-based healthcare model in 17 schools serving 42,500 vulnerable children in Lusaka, Zambia. The school health model was developed as the result of two previously successful Rotary Global Grants. The model has demonstrably improved the health and learning of children. This project aims to expand the model into three

Exit Next

#### GRANT INFORMATION

GRANT NUMBER  
GG1870710

#### GRANT STATUS

Approved

LAST ACTIVITY  
19/02/2019

Print application (PDF)

#### Grant Resources

Questions about the grant process? We're here to help, from getting you started to final steps.

Application Supplement for Microcredit Projects

Conflict of Interest Policy for Program Participants

Cooperating Organization Memorandum of Understanding

Global Grant Application Template

Global Grant Calculator

Global Grant Lifecycle

Global Grant Monitoring and Evaluation Plan Supplement

Step 4: Areas of Focus ✓

Step 5: Measuring Success ✓

# Rotary.org Grants Center

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## Example of Funding Section

grants.rotary.org

Merrill UBS Online Services Washington Post Boston Globe Seacoast Online Facebook Rotary Intl Home Page | District 7780 Portsmouth Home Page Login | SCORE Boston.com Twitter Quick

All fields are required unless noted as "optional".

- Step 1: Basic Information ✓
- Step 2: Committee Members ✓
- Step 3: Project Overview ✓
- Step 4: Areas of Focus ✓
- Step 5: Measuring Success ✓
- Step 6: Location and Dates ✓
- Step 7: Participants ✓
- Step 8: Budget ✓
- Step 9: Funding ✓

Print application (PDF)

**Grant Resources**  
Questions about the grant process? We're here to help, from getting you started to final steps.

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- Global Grant Scholarship Supplement
- Grant Travel
- Global Grants Community Assessment Results
- Guide to Global Grants
- Guidelines for Rotary Foundation-Funded Project Signage
- How to Use the Grant Center
- Report Supplement for Microcredit Projects
- RI Exchange Rates
- Rotary Grants Staff Contact Sheet
- Six Steps to Sustainability

Tell us about the funding you've secured for your project. We'll use the information you enter here to calculate your maximum possible funding match from the World Fund.

#	Source	Details	Amount (USD)	Support*	Total	
1	Cash from Club	Ipswich	4,200.00	210.00	4,410.00	
2	District Designated Fund ...	7930	30,000.00	0.00	30,000.00	
3	Cash from Club	Andover	1,000.00	50.00	1,050.00	
4	Cash from Club	South Portland-Cape...	1,500.00	75.00	1,575.00	
5	Cash from Club	Lynnfield	2,000.00	100.00	2,100.00	
6	District Designated Fund ...	7780	20,000.00	0.00	20,000.00	
7	Cash from Club	Witney	7,000.00	0.00	7,000.00	
8	Cash from Club	Woburn	1,000.00	50.00	1,050.00	
9	Cash from Club	Reading	3,000.00	150.00	3,150.00	
10	Cash from Club	Belle Isle (East Bosto...	1,000.00	50.00	1,050.00	



# Rotary Foundation Resources



Dave Underhill, District 7780 Global Grants Coordinator,  
[dave.underhill.nh@gmail.com](mailto:dave.underhill.nh@gmail.com)  
[603-706-3143](tel:603-706-3143)

Lawrence Furbish, District Foundation Chair [lkfurbish@mac.com](mailto:lkfurbish@mac.com)

[Rotary.org> MyRotary> The Rotary Foundation> Grant Center](#)

<https://my.rotary.org/en/rotary-foundation-approves-changes-funding-model-set-take-effect-1-july-2021>

[Link to resource documents on rotary7780.org](#)

