



# Foundation Grants Seminar 2018

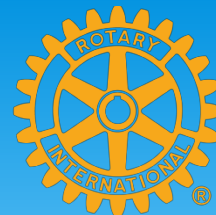
## Module 1:

### Purpose and Types of Rotary Grants

Lawrence Furbish  
District Foundation Chair  
Rotary District 7780

# Objectives of this Module

The  
**Rotary**  
Foundation



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 (DDF).
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 World Fund of The Rotary Foundation (not from District or RI dues).

# Why is it important?

The  
**Rotary**  
Foundation



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

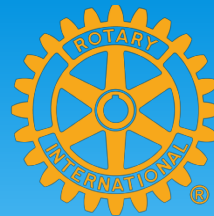
# How are Rotary Foundation dollars raised?



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 \$1000 annually
  5. **Major Donors** - Rotarians or couples who give at least \$10,000 over a lifetime
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. **Endowment** - earnings off 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?

The  
**Rotary**  
Foundation

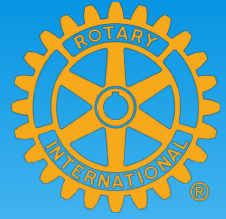


District Designated Funds: Half the monies Rotarians in the District donate to the Annual Fund are tallied and “come back” to be spent DIRECTLY by the District. The other half goes into the World Fund and is spent indirectly by the District to support Global Grants.

*The money that is spent directly is called “DDF” or “District Designated Funds.”*

# Let's Talk about Foundation Grants

The  
**Rotary**  
Foundation



There are two kinds of Rotary Foundation Grants:

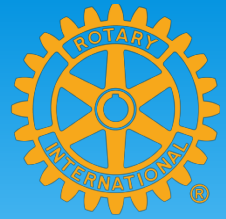
- **District Grants.** Based on the District's previous level of giving to The Rotary Foundation, a “block grant” is made available for clubs to spend to fulfill humanitarian needs.
- **Global Grants.** These humanitarian grants represent a partnership between two Rotary clubs in two countries/ districts. Club cash is “matched” by the District and “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

*How are they similar?*

The  
**Rotary**  
Foundation



1. Both grant types can take place locally OR internationally.
2. Both must fall within the guidelines of one of Rotary's "Areas of Focus" (you will learn more about these later).
3. Both must be sustainable. This means:
  - Grant must be financially sustainable
  - Supplies should be sourced locally
  - Local people should be able to maintain grant after Rotarians go home
4. Both involve \$ "matches" from the District (and in case of Global Grants from The Rotary Foundation).
5. Both require similar club qualifications, reporting and financial management (you will learn more about these later).



# Global Grants and District Grants

## *What are the Areas of Focus?*

The  
**Rotary**  
Foundation

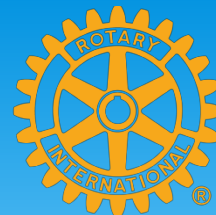


All grants must fall within one of Rotary's "Areas of Focus." Be sure to read the "Areas of Focus Policy Statements" for specifics! It's also important that grants NOT cover more than one Area of Focus. That's because with each Area of Focus comes specific requirements. Keep it simple and stay with one Area of Focus (you can always do a follow-on grant in another area). The Areas of Focus are:

**Education and Literacy**  
**Clean water and Sanitation**  
**Maternal and Child Health**  
**Disease Prevention and Treatment**  
**Economic and Community Development**  
**Peace and Conflict Resolution**

# Global Grants and District Grants: How are they different?

The  
**Rotary**  
Foundation



- **Size.** District grants run \$1000-\$4500 in total size; Global Grants start at \$30,000 (of which \$15,000 is from The Rotary Foundation).
- **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 holistic assessment of community needs, measurable goals, and end with an evaluation that determines 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.

# District and Global Grants:

## How does my club “qualify” to participate?



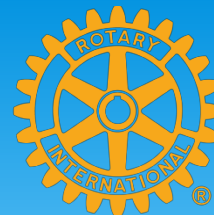
Each year, District 7780 requires each club to “qualify” by doing six things:

- One member must take the Grants Management Seminar at least every other 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.

# District and Global Grants:

## How does my club maintain its qualification?

The  
**Rotary**  
Foundation

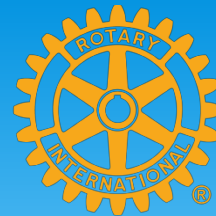


Each year, District 7780 requires each club involved in Grant-making to:

- 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

The  
**Rotary**  
Foundation



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

Dave Underhill, Global Grants Coordinator,  
[dave.underhill.nh@gmail.com](mailto:dave.underhill.nh@gmail.com)

Betty Hughes, District Grants Coordinator,  
[esh1508@myfairpoint.net](mailto:esh1508@myfairpoint.net)

District Foundation site: Drop-down tab  
“Foundation and Grants” on [www.rotary7780.org](http://www.rotary7780.org)

