GLOBAL GRANTS TRAINING SEMINAR

Rotary District 5340

For Rotary year 2022-2023
A GUIDE TO
GLOBAL GRANTS

TAKE ACTION: rotary.org/grants
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 Grant Center to apply for a grant, track its progress, report on it, and search for other
Welcome to Rotary grants! As Rotary members, we contribute resources to solve some of the world's most serious problems in local communities to promoting peace worldwide, Rotary ideas to life.

Use the Grant Center to apply for a grant, track its progress, or view grants in your district.

Types of grants

The Rotary Foundation offers grants that support humanitarian and vocational training teams. Here's an overview:
Types of grants

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

- **Global grants** support large international projects with one or more of Rotary’s areas of focus. They range from...

- **District grants** fund smaller-scale, short-term projects in your community or abroad.

The lifecycle of a Rotary grant
GLOBAL GRANTS

- Large, long-term projects
- Sustainable, measurable outcomes
- Alignment with areas of focus
- International partnership
YOUR PROJECT MUST:

- Have a long-term, sustainable impact
- Include activities that align with the goals of one of Rotary’s areas of focus
- Have a minimum budget of $30,000
- Address an important need identified by the community
- Strengthen the community’s capacity to address its own needs
SUSTAINABILITY OF PROJECTS IS IMPORTANT FACTOR IN TRF CONSIDERATION

Giving a community the skills and knowledge to maintain project outcomes for the long term, after grant funds have been expended.
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.
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ROTARY’S AREAS OF FOCUS

PEACEBUILDING AND CONFLICT PREVENTION

ENVIRONMENT

DISEASE PREVENTION AND TREATMENT

COMMUNITY ECONOMIC DEVELOPMENT

WATER, SANITATION, AND HYGIENE

BASIC EDUCATION AND LITERACY

MATERNAL AND CHILD HEALTH
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The Rotary Foundation offers grants that support humanitarian and vocational training teams. Here’s an overview:

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
- Community Assessment Results
- 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
Only pick only **ONE** area of focus no matter how many areas of focus you think your project fits into!
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- Have a minimum budget of $30,000
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- Strengthen the community’s capacity to address its own needs
GLOBAL GRANTS

- Are BIG!
  - $30,000 minimum total budget

- World Fund match
  - No minimum
  - Maximum $200,000 (without additional review)
YOUR PROJECT MUST:

☐ Have a long-term, sustainable impact
☐ Include activities that align with the goals of one of Rotary’s areas of focus
☐ Have a minimum budget of $30,000
✔ Address an important need identified by the community
✔ Strengthen the community’s capacity to address its own needs
COMMUNITY ASSESSMENT IS REQUIRED!

- Base projects on real needs
- Identify resources that your club and potential partners have
- Talk to the community

To find this search “Rotary Community Assessment Tools”
METHODS USED FOR ASSESSMENT

- Survey
- Community meeting
- Interview(s)
- Focus group
- Asset inventory
- Community mapping
- Other
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The Rotary Foundation offers grants that support human rights and vocational training teams. Here’s an overview:

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- Grant Travel
YOU MUST:

- Qualify your club or district for global grants every year
- Actively involve the benefiting community in the project
- Partner with a club in another country
- Act as primary sponsor of no more than 10 active global grants at a time
- Develop a project plan that includes a budget and a financial management plan
- Apply for a grant through the Grant Center
- Stay up-to-date in reporting for all active grants

For humanitarian projects and those that involve vocational training teams:
- Conduct a community assessment before applying and include the results in your application
- Measure progress toward the outcome
1. To qualify for global grant DDF, club must have achieved a minimum of $100 per capita giving to the Annual Fund or a club total of at least $20,000 for the 2021-2022 Rotary year.

2. All District and RI dues must be up to date.
3. TRF Memorandum of Understanding must be signed.
   - Signed by 2022-2023 & 2023-2024 presidents
   - Email signed form to mericsson@me.com

4. Two club members must attend this training and complete the assessment quiz.
5. All grant reporting must be up to date. No more than 10 active global grants.

6. The club’s Rotary Foundation giving goals must be entered by the club president (Not available until July 1, 2022)
To download MOU:

1. Go district web site rotary5340.org
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GLOBAL GRANTS

- International partnership
  - Host
  - International Club
    - must contribute at least 15% of funding
  - Exceptions
    - Term gifts involved
HOW TO FIND ROTARY PARTNERS FOR GLOBAL GRANTS

- Rotary Convention
- Project fairs
- LinkedIn
- Facebook
- Rotary events
- www.matchinggrants.org/global
- www.rotary.org/rotaryideas
• Both the Host and International Clubs must have:
  • Primary Contact
  • Two additional club members for the grant committee
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For humanitarian projects and those that involve vocational training teams:
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Each Club eligible for up to $10,000 in District Designated Funds (DDF) for 2022-2023 Rotary year.

- Club cash contributions are matched 1:1 up to $10,000.
- Clubs encouraged to work together to do bigger grants
  - No more than $40,000 in DDF collectively for a single grant
- Grants must be fully pledged on MatchingGrants.org before DDF will be allocated for your project.
- Grants must comply with D5340 Youth Protection Policy (if applicable)
Cash donations by Clubs

- No Rotary Foundation match
- Note: 5% must be added to club cash contributions for administrative costs (May be avoided by contributing directly to project account)

District Designated Funds

- Matched 80%
Example:
- $15,000 Clubs’ cash
- $15,000 District Designated Funds
- TRF Match
  - $12,000 for DDF
- Total Funds for project -- $42,000
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WHEN YOUR GRANT IS APPROVED……

- **Project specific bank account** must be established.
- All cash must be sent to TRF or bank account.
  - 5% surcharge for funds sent to TRF – get Paul Harris credit
  - No surcharge if funds sent directly to project bank account
- TRF will wire funds to bank account, including DDF.
NOTE
(and answer to a very common question)

The DDF portion is never in the District’s hands. We don’t need to do anything once the grant is approved to transfer these funds to the project account. The Rotary Foundation does this directly.
Grant Management

Ensures that projects
• Have proper financial controls
• Adhere to technical standards
• Meet the needs of beneficiaries
• Fulfill their objectives
• Safeguard funds

Grant management and Reporting is the responsibility of both the International and Host grant committees.
Grant Management

- Document ALL expenditures
  - Save all receipts and invoices
  - Keep a log of all expenses
- Retain all bank statements. They are required as part of your reporting.
- Reports due annually and 2 months after project completion.
  Submitted online through Grants Center
- Take pictures of the project before initiation, during your work and after completion.
Grant Management

• Spend grant funds only on items in the grant application
  • If you need to alter your spending plan significantly, contact TRF in advance for approval
  • If you are underbudget, you may contact TRF in advance for permission to spend remaining funds in some other manner
• Any unspent funds will need to be returned to TRF.
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STEPS FOR MONITORING AND EVALUATION PLAN

1. Establish clear project goals in the planning phase.
2. Identify applicable Rotary Foundation standard measures.
3. Identify additional project-specific measures.
4. Establish baseline data and the methods you’ll use to collect data.
5. Submit the plan as part of the online application.
6. Collect data during the project, and monitor progress.
7. Evaluate data and submit results to the online report.
EXAMPLES OF ROTARY FOUNDATION STANDARD MEASURES

• Number of direct beneficiaries
• Number of indirect beneficiaries
• Number of people trained
• Number of participants
• Number of people receiving service
• Number of events
• Number of jobs created
• Number of benefitting facilities
• Number of communities with less conflict
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Types of grants

The Rotary Foundation offers grants that support humanitarian projects and help communities in need. Here’s an overview:

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For humanitarian projects and those that involve vocational training teams:
☐ Conduct a community assessment before applying and include the results in your application
☐ Measure progress toward the outcome
TRF Reporting Requirements

• Every 12 months throughout the project duration

AND

• Within 2 months after grant completion
Types of grants

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- **District grants** fund smaller-scale, short-term projects in your community or abroad.

The lifecycle of a Rotary grant

[Image of lifecycle stages: Draft, Authorization, Submitted]
GLOBAL GRANT SCHOLARSHIP
To get approval for your grant DDF allocation from our District, you MUST enter your grant on matchinggrants.org and show that it is fully pledged.
APPLYING FOR A GLOBAL GRANT

- Enter your project on Matchinggrants.org
Welcome to the Rotary Global Grants Website

Look below for a list of project. Use the search feature to find a specific project.
Click on My Account to login and see your own projects.

List of Projects

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Country</th>
<th>Location</th>
<th>District</th>
<th>Club</th>
<th>Amount</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>G-1320</td>
<td>Social Inclusion for Deaf</td>
<td>Brazil</td>
<td>Jundiai</td>
<td>4590</td>
<td>Jundiai-Serra do Japy</td>
<td>$100,000</td>
<td>Need $58,000</td>
</tr>
<tr>
<td>G-1318</td>
<td>1001 Tapis</td>
<td>Tunisia</td>
<td>Kasserine</td>
<td>9010</td>
<td>Tunis Golfe New Generation</td>
<td>$32,000</td>
<td>Need $13,334</td>
</tr>
<tr>
<td>G-1317</td>
<td>Seholi Primary School</td>
<td>South Africa</td>
<td>Limpopo</td>
<td>1150</td>
<td>Usk</td>
<td>$600,000</td>
<td>Need $393,334</td>
</tr>
<tr>
<td>G-1316</td>
<td>Medical Support for Clinics</td>
<td>Mexico</td>
<td>San blas</td>
<td>5300</td>
<td>Walnut Valley (Diamond Bar)</td>
<td>$82,500</td>
<td>Need $40,667</td>
</tr>
<tr>
<td>G-1315</td>
<td>2017 Eco-sanitation</td>
<td>Bolivia</td>
<td>Comanche</td>
<td>4690</td>
<td>La Paz-Sopocachi</td>
<td>$183,000</td>
<td>Need $74,000</td>
</tr>
<tr>
<td>G-1314</td>
<td>Medical Equip for Maternity</td>
<td>Argentina</td>
<td>Pilar</td>
<td>4895</td>
<td>Pilar Norte</td>
<td>$30,500</td>
<td>Need $20,334</td>
</tr>
<tr>
<td>G-1313</td>
<td>Heart Defects Prevention</td>
<td>Ukraine</td>
<td>Lviv</td>
<td>2232</td>
<td>Lviv International</td>
<td>$35,000</td>
<td>Need $23,334</td>
</tr>
<tr>
<td>G-1312</td>
<td>Breast Cancer Detection</td>
<td>Mexico</td>
<td>Chihuahua</td>
<td>4110</td>
<td>Ciudad Juarez Frontera</td>
<td>$84,001</td>
<td>Fully Pledged</td>
</tr>
</tbody>
</table>
## APPLYING FOR A GLOBAL GRANT

### Submit a New Project

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Country</th>
<th>Rotary Year</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2016-17</td>
<td></td>
</tr>
</tbody>
</table>

**Areas of Focus** (Check all that apply)

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

**Project Description:** You should include what needs have been identified, how the project will meet those needs, and the timeline for your project. Please specify what the project funds will be used for and how club members will be involved.

### Primary Host Partner

<table>
<thead>
<tr>
<th>District Number</th>
<th>Rotary Club of</th>
<th>Contact Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Amount contributed by Club in Project Country (if any)**

**Amount contributed by District in Project Country (if any)**

### Primary International Partner

This section is optional. Fill this section only if you have an International Partner (fully pledged or partially pledged). Leave blank otherwise.

<table>
<thead>
<tr>
<th>District Number</th>
<th>Rotary Club of</th>
<th>Contact Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Amount contributed by International Club (if any)**

**Amount contributed by International District (if any)**

### Project Budget

<table>
<thead>
<tr>
<th>TRF Grant #</th>
<th>TRF Staff</th>
<th>TRF Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Additional Contribution (not matched by TRF)**

**Total Budget**

- Ask for TRF Match (uncheck when TRF funds are exhausted)
APPLYING FOR A GLOBAL GRANT

Project Description

Region: Central America  Country: Costa Rica  Location: San Jose District 4240  Total Budget: $150,000
Area of Focus: Disease prevention and treatment

After the initial diagnosis and treatment clinic for treatment of Craniofacial and Articulation disorders is in place this coming Spring 2016 treating minor disorders, the patients having advanced and debilitating conditions will need this advanced procedure grant to be able to obtain total joint replacement surgery, release of total jaw ankylosis and further reconstructive facial procedures such as Cranio-Orthognathic reconstructions. This grant will allow them to have access for this care via specialists educating the local clinicians in the techniques, and still be able to have sustainable care provided by the ongoing educational University of Latina efforts associated with this charitable and educational clinic.

The population located in Costa Rica afflicted with residual craniofacial and articulation disorders will be the direct beneficiaries. Future patients currently treated by the Children’s Hospital who will outgrow their free benefits before obtaining final reconstructive results will also benefit. There is an estimated population in Costa Rica of over 100,000 suffering with articulation disorders affiliated with Cranio-Skeletalfacial or dental disorders. The timeline will take place from December 2016 until June 2017.

Primary Host Partner

District: 4240  Rotary Club of: San Juan del Murcielago-Tibás
Primary Contact: Juan Augusto Hernandez Hernandez  Email: ahernandez@hdezcpa.com

Primary International Partner

District: 5340  Rotary Club of: Carlsbad
Primary Contact: Dr Jeff Moses  Email: drjeffmoses@yahoo.com

Project Status

Need $100,000
This project needs to receive some pledges to go to the next level. Please check the "Financing" tab to see the list of current pledges. Once the amount pledged is equal to the project budget, the status of the project will be automatically changed to "Fully Pledged".

Click here to pledge support for this project.
Project listed for the 2016-17 Rotary Year.
The TRF Grant application number is #16386.
project. You do not have to send the money until instructed to do so. You will be contacted when all the funding for this project has been identified. Thank you for your support!

Pledge Support for Project G-1037 - CostaRica Craniofacial Smiles

Click here IF you do want to make an immediate donation by credit card instead of a pledge for your club or district.

<table>
<thead>
<tr>
<th>District Number</th>
<th>Rotary Club of</th>
</tr>
</thead>
<tbody>
<tr>
<td>5340</td>
<td>Del Mar</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Contact Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Janice Kurth</td>
<td><a href="mailto:jkurth1@san.rr.com">jkurth1@san.rr.com</a></td>
</tr>
</tbody>
</table>

Amount contributed by this Club (if any) (Cash): 1000

Amount contributed by this District (if any) (DDF):
### Proposed Financing

<table>
<thead>
<tr>
<th>Description</th>
<th>Date</th>
<th>Cash</th>
<th>DDF</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Salvador Cuscatlán (4240)</td>
<td>9-May-16</td>
<td>$5,000</td>
<td>-</td>
<td>$5,000</td>
</tr>
<tr>
<td>La Jolla Sunrise (5340)</td>
<td>9-May-16</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$20,000</td>
</tr>
<tr>
<td>Coronado (5340)</td>
<td>19-Sep-16</td>
<td>$1,000</td>
<td>-</td>
<td>$1,000</td>
</tr>
<tr>
<td>District 6960 DDF</td>
<td>21-Sep-16</td>
<td>-</td>
<td>$5,000</td>
<td>$5,000</td>
</tr>
<tr>
<td>Poulso-North Kitsap (5020)</td>
<td>21-Sep-16</td>
<td>$3,715</td>
<td>-</td>
<td>$3,715</td>
</tr>
<tr>
<td>Bainbridge Island (5020)</td>
<td>19-Oct-16</td>
<td>$5,000</td>
<td>-</td>
<td>$5,000</td>
</tr>
<tr>
<td>Torrey Pines (La Jolla) (5340)</td>
<td>18-Nov-16</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$20,000</td>
</tr>
<tr>
<td>Ciudad Merlot-Santa Tecla (4240)</td>
<td>22-Dec-16</td>
<td>$500</td>
<td>-</td>
<td>$500</td>
</tr>
<tr>
<td>Burlington (5050)</td>
<td>8-Feb-17</td>
<td>$3,000</td>
<td>-</td>
<td>$3,000</td>
</tr>
<tr>
<td>District 4240 DDF</td>
<td>8-Feb-17</td>
<td>-</td>
<td>$10,000</td>
<td>$10,000</td>
</tr>
<tr>
<td>District 5280 DDF</td>
<td>8-Feb-17</td>
<td>-</td>
<td>$5,000</td>
<td>$5,000</td>
</tr>
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**Remaining Amount to Raise**

- **Additional Club Contribution (Needed)** - Add a contribution: **$41,786**
- **Amount Requested from The Rotary Foundation**: **$40,000**

**Total**: **$200,000**

*DDF contributions in grey are pending approval of the corresponding district committee.*

**Note**: as of July 1, 2015 there is a **5% additional support fee** for cash contributions. This fee does not appear in the financials above because it does not apply if the funds are sent directly to the project account (without going through TRF, and therefore without Paul Harris credit). Clubs sending their cash contribution to TRF must be aware they will have to send an additional 5%.
When you are working on matchinggrants.org, click refresh if you don’t see your work reflected on the screen!
Grants are considered on an ongoing basis until funds are depleted.

- Approximately $160,000 available for 2022-2023

Submit early!

Projects evaluated with consideration of project merit and club Annual Giving to The Rotary Foundation.
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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?

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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Club</th>
<th>District</th>
<th>Sponsor</th>
<th>Role</th>
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<tr>
<td></td>
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</table>

+Add Primary Contact  ✔ Notify Primary Contact

Switch host, international contacts, and committees.

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 Calculator
- Global Grant Lifecycle
- Global Grant Monitoring and Evaluation Plan Supplement
- Global Grant Scholarship Supplement
- Grant Travel
<table>
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<tr>
<th>Step 2: Committee Members</th>
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<td>Step 4: Areas of Focus</td>
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<td>Step 5: Measuring Success</td>
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<td>Step 6: Location and Dates</td>
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**Finalize & Submit**

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<th>Step 11: Review and Lock</th>
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Rotary5340.org

Grants

Guide to Grants

Global Grants

Global Grants

Grant Policies 2021-2022

Global Grants Management Seminar

Global Grants Quiz

Club Memorandum of Understanding (PDF)

Club Memorandum of Understanding Worksheet (PDF)
DDF allocations for Global Grants for the 2022-2023 Rotary year will be considered starting immediately!
RESOURCES

- www.rotary.org/myrotary
  - “Grants Center”

- www.rotary5340.org
  - “Foundation”
  - “Resources & References”

- www.rotary2627.org
  - “Club/District Resources” then “Our Foundation” then “Foundation Resources” then “TRF Resource Guide”
THE ROTARY FOUNDATION SAYS:

Thank you!

And I thank you too.

Contact me at janice@janicekurth.com with questions and/or clarifications.