



DOING GOOD IN THE WORLD

From Foundation Walk to Grants

2024-25 D7070 Qualification Seminar

For Rotarians and Rotaractors in D7070

Module 1 – The Rotary Foundation

**Module 2 – Grants;
Global, District & Other**



THE ROTARY FOUNDATION'S MISSION



The Rotary Foundation helps Rotary members to Advance World Understanding, Goodwill, and Peace by Improving Health, Providing Quality Education, Improving The Environment, and Alleviating Poverty.

NOT JUST ROTARIANS, ROTARACTORS TOO

July 1, 2022, Rotaract Clubs became eligible for District and Global Grants. Like Rotary Clubs, they must be qualified. There are some special rules:

- ❖ Rotaract Clubs can apply for District Grants
- ❖ Rotaract Clubs can be the Host and/or International Partner in Global Grants if they have been a partner in a previous Global Grant project with a Rotary Club
- ❖ If a Rotaract Club is an International or Host Partner in a Global Grant project, the other Partner must be a Rotary Club.
- ❖ Eventually, Rotaract Clubs will be allowed to apply for District and Global Grants like Rotary Clubs. However, it has not been decided yet when this will happen
- ❖ **Rotary Clubs are encouraged to invite Rotaract Clubs to be part of Grants projects – so far very limited participation by Rotaract Clubs**





THE ROTARY FOUNDATION'S THREE FUNDS

The Rotary Foundation won't work without donations!
You, your family & friends, Rotarians & everyone else can donate!

❖ Endowment Fund

- ❖ Ensures long-term stability of the Foundation's grants and programs
- ❖ Contributions DO NOT qualify for Paul Harris recognition

❖ Annual Fund

- ❖ Primary source of funding for TRF's local and international grants and programs
- ❖ Contributions qualify for Paul Harris recognition

❖ PolioPlus Fund

- ❖ Contributions are used for the End Polio Now campaign
- ❖ Contributions qualify for Paul Harris recognition

❖ Additional Funds

- ❖ Disaster Response Fund, Ukraine Disaster Response Fund, etc.



ACTIVITIES/PROGRAMS OF THE FOUNDATION

The Rotary Foundation is spending funds on three different programs

❖ PolioPlus

- From 350,000 cases (120+ countries) in 1985 to <15 (2 countries) in 2023
- Rotary has contributed >USD2.6 billion & a huge number of volunteer hours
- Works with WHO, CDC, UNICEF, Gates Foundation & governments
- Funded by PolioPlus funds & DDF

❖ Rotary Peace Fellowships

- Graduate degree in international relations, peace, conflict resolution at five universities around the world, and Professional Development Certificate at two universities.
- Districts nominate by July 1 for worldwide competition
- Funded by DDF, Endowment Fund & World Fund

❖ Grants

- District Grants & Global Grants (Humanitarian, VTT & Graduate Scholarships)
- Funded by DDF & World Fund

WHO CAN PARTICIPATE IN THE GRANTS PROGRAM?

The Rotary Foundation requires that Rotary & Rotaract Clubs that want to participate in the Grants program, must

- have min. 2 members complete the District's Qualification Training (either attending the on-line modules and/or attending the seminar November 18, 2023), &
- sign a Memorandum Of Understanding (MOU) found on the District's website (President & President-Elect)

The Certification is valid for One Year, Once qualified. The Club as a unit is qualified and responsible visavi TRF for grant management. Not just the two members who took the training, nor those who wrote an application.

THE SHARE SYSTEM – ANNUAL FUND – 2024-25

**Raised in D7070 for the Annual Fund in 2021-22
USD351K**

**World Fund
USD167K**

**Contributions from
all Rotary Distrits.
Used to match DDF
in Global Grant
projects**

**TRF
Admin
USD17K**

**DDF
USD167K**

**Min. 50%
USD83.5K**

**Max. 50%
USD83.5K**

**+ Matching Club cash in
Global Grant projects
+ Graduate Scholarship
+ PolioPlus donations
+ Peace Center
donations**

**District
Grants**

POTENTIAL ALLOCATION OF DDF 2024 - 25

District 7070 will get min. USD167,000 of 'New' DDF for the 2024-25 Rotary year

- Estimated carry over of DDF from 2023-24 USD50,000
- Total Available DDF estimate for 2024-25 USD217,000
- Max 50% of New DDF or USD83,500 can be used for District Grants
- **Potential usage of DDF in 2024-25** (draft)
 - Graduate Scholarship @USD17,500 USD 17,500
 - PolioPlus (20% of 167K) USD 35,000
 - Match of Club Cash for Global Grants USD 65,000
 - District Grant (max. 50% of 167K) USD 80,000
 - Misc; Carry over to 2025-26 USD 19,500
 - **Total** **USD217,000**

N.B. The amount of new DDF will likely be higher thanks to interest from the Endowment Fund



GLOBAL vs. DISTRICT GRANTS

Global Grants

- Long-term
- Administered by TRF
- Application/reporting on-line at Rotary's Grant Centre
- Applications anytime in the year
- Must relate to **one or more of the seven areas of focus**
- Must be sponsored by **one Host Club/District** where the project takes place; **one International Club/District** outside that area
- **Budget >USD30,000**
- Humanitarian Projects, VTT & Graduate level Scholarships

District Grants

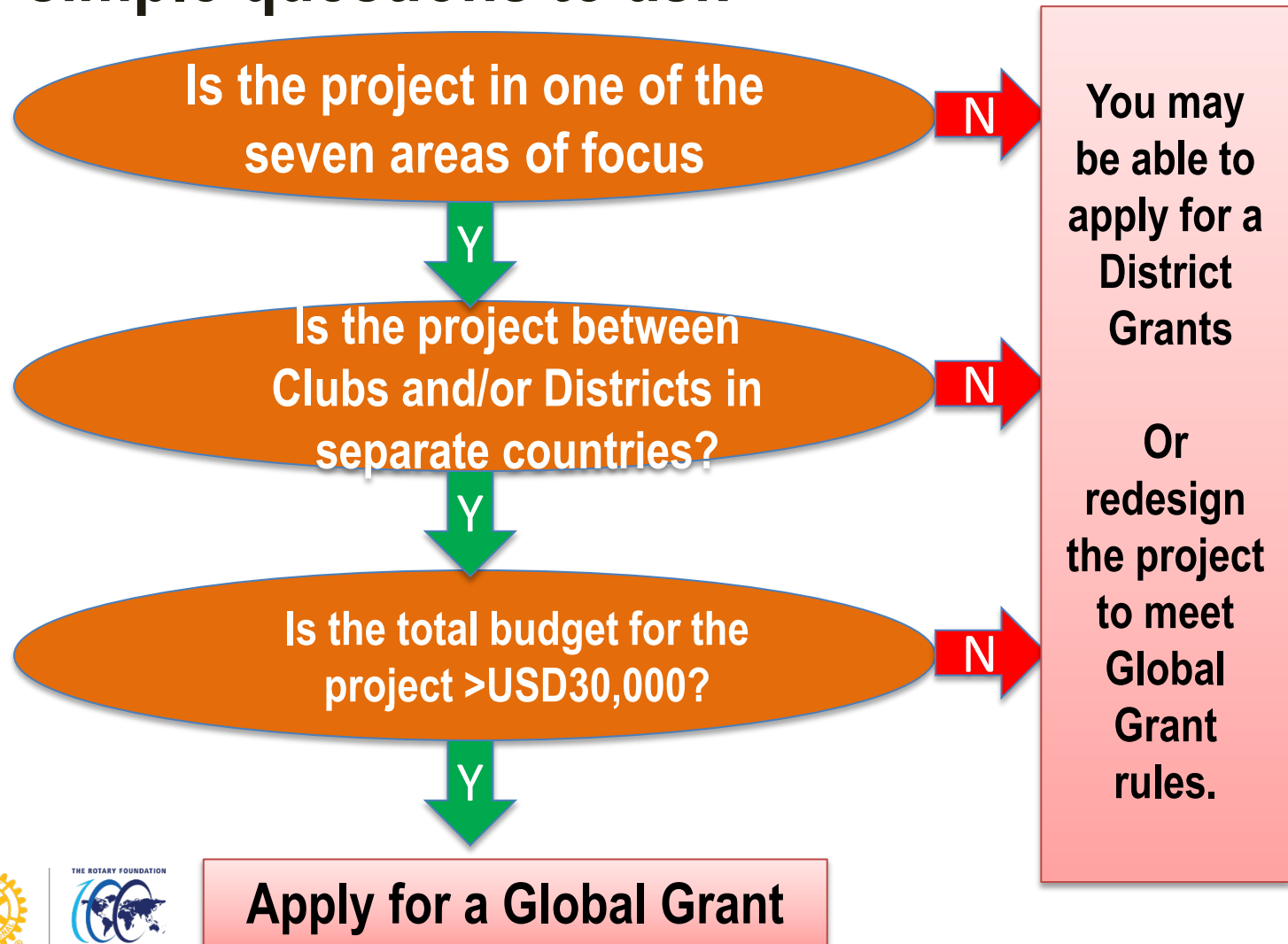
- Short-medium term
- Administered by the District
- Must support The Rotary Foundation's mission
- Clubs apply to the District
- Can be used for local and international projects
- Can also be used for projects in areas with no Rotary Clubs
- No minimum budget amount
- Districts are free to develop their own policies, procedures & rules, such as the May 31, 2024 dead-line for applications & matching policy

ROTARY'S SEVEN AREAS OF FOCUS

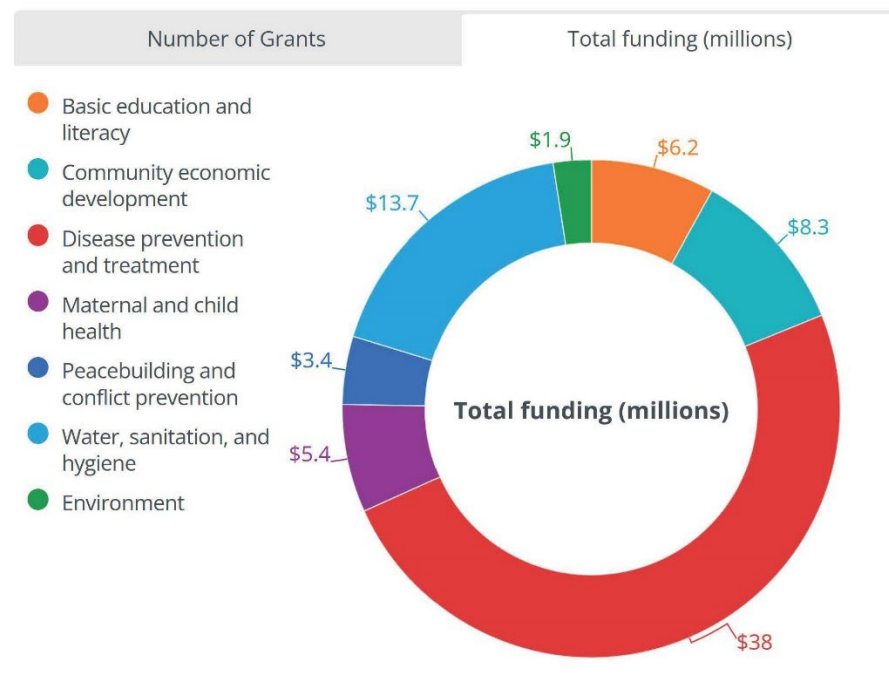
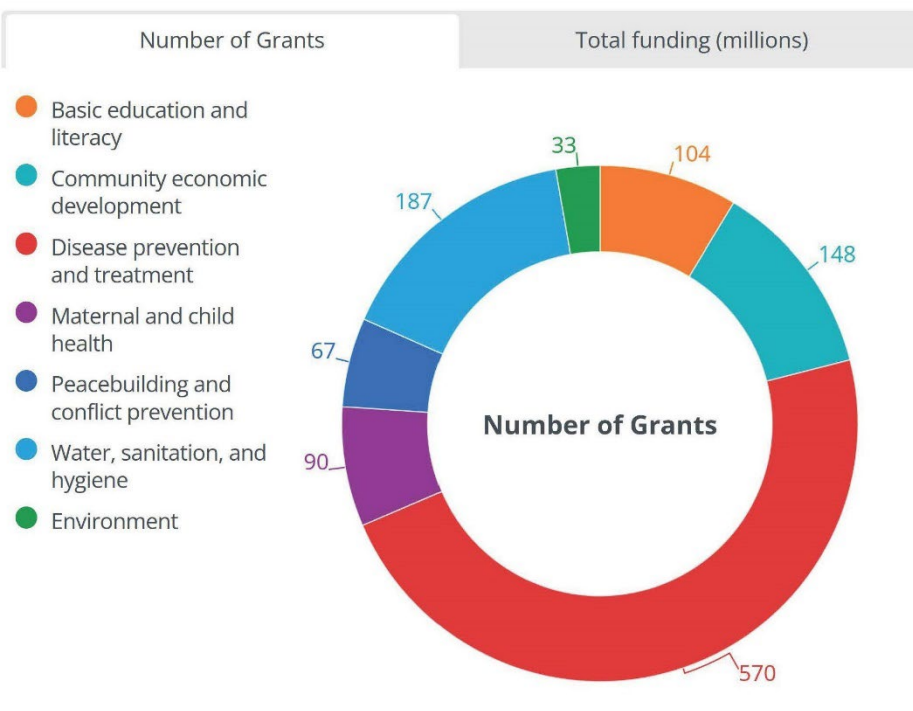


GLOBAL or DISTRICT GRANT?

- Three simple questions to ask



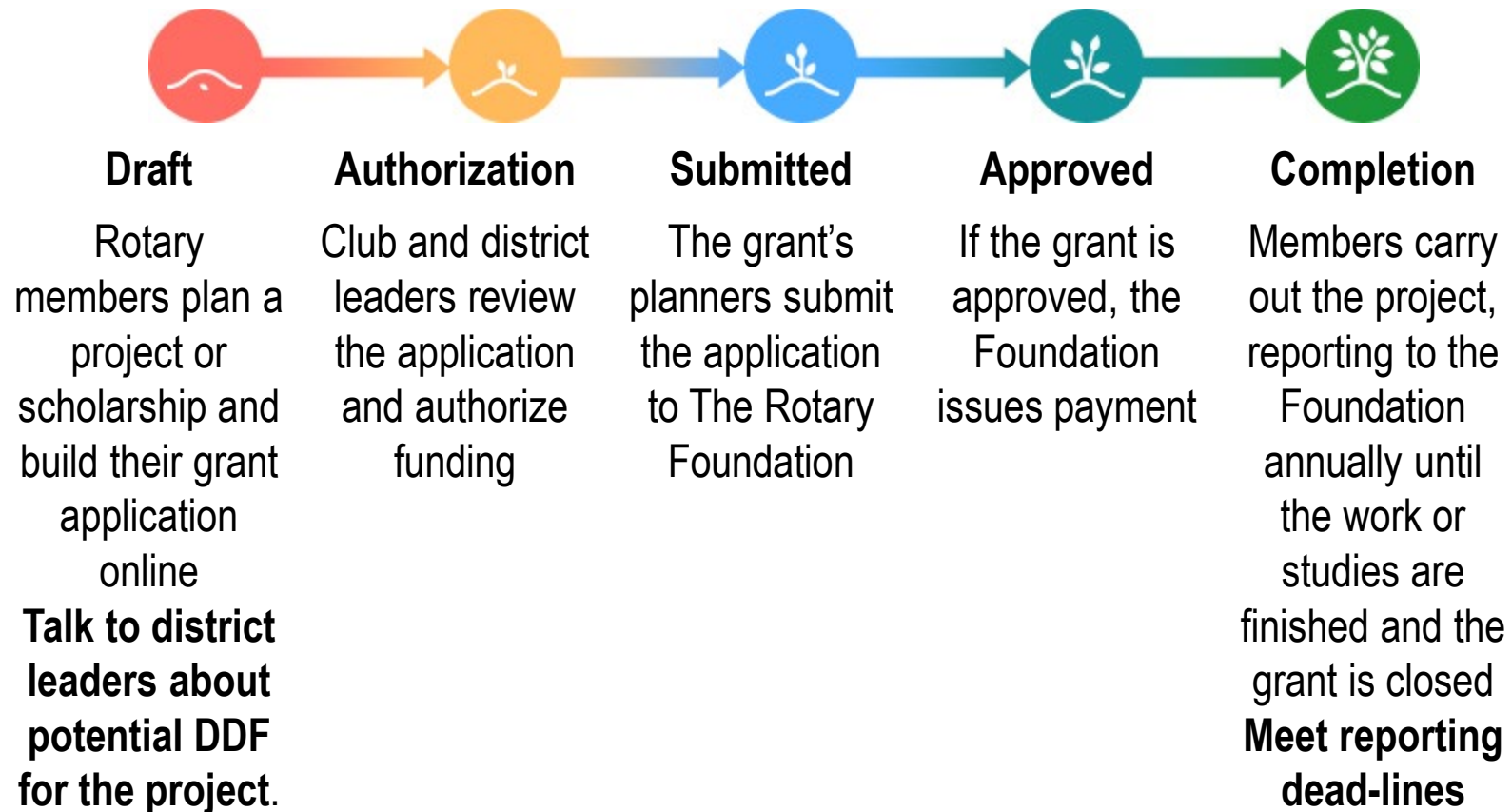
GLOBAL GRANTS AWARDED IN 2021-22



Grant Summary 2021-22

	(USD million)
❖ 478 District Grants	27
❖ 207 Disaster Response Grants	8
❖ 1,199 Global Grants	73
❖ 1 Program of Scales	2
Total	110

GLOBAL GRANT CYCLE



HOW TO APPLY FOR A GLOBAL GRANT

- Go to www.rotary.org
- Log in under My Rotary at the top of the page
- Go to 'Take Action' in the heading
- Under 'Apply for Grants', click on 'Grant Center'
- At the Grant Centre, click on 'Apply for a Grant'
- You will find a blue ribbon across the screen, where you specify the type of grant. You are applying for a 'Global Grant' (District Grant applies only to District representatives, responsible for applying for the District Block Grant.
- An application form will appear, with a Global Grant number
- You can start filling out the Application Form
- **NB Only Clubs that are qualified can apply for funds from the Rotary Foundation. Make sure your Partner, Host or International, also is qualified!**

GLOBAL GRANT APPLICATION FORM

ROTARY.ORG > My Rotary | Lars Henriksson | Sign out

Grant Search

English



Grant Center

Home

Apply for a Grant

My Grants

My Actions

Rotary Grants | My Grants | GG084619

District Number: 7070 District Status: ✔ Qualified

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?

100/100 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

GRANT INFORMATION

GRANT NUMBER

...

GRANT STATUS

...

LAST ACTIVITY

13/01/2019

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](#)



BUT BEFORE YOU START ...

Before you start working on your on-line Global Grant application, please visit Grant Resources at the Apply for a Grant at www.rotary.org

- Download and read “**Terms and Conditions for Rotary Foundation Global Grants**” & “**Guide to Global Grants**”. These two documents will tell you what is eligible and non-eligible for Foundation funds usage and give you valuable information on how to design successful Global Grant projects.
- Also download the **Global Grant Calculator** – a very useful tool
- You **must** contact District leadership to discuss any **DDF** for your project. Fill out the **DDF Request Form**, available on www.rotary7070.org and send it to the District. D7070 just has a limited amount of DDF to share.
- You may want to download the ‘**Global Grant Application Template**’. It is a paper version of the on-line application form. Can be helpful to work on initially, when you draft your application
- You may find many other document on the site that can be very useful. Each project is different; rules and requirements may affect your application differently.

SOME KEY ELEMENTS IN THE GG APPLICATION

- A Global Grant application requires one Host Partner (Club or District) and one International Partner (Club or District) in separate countries.
- Both must be qualified
- The Host Club/District is LOCATED where the project will take place
- Both the Host and International Partner must each have three members on their respective project committee
- Both the Host and International Partner have access to the on-line application
- At least 15% of the cash contribution must come from outside the Host District
- No requirement that the Host Club/District contributes financially to the project. But ask! Both for Club cash and DDF.

WHAT CAN & CAN'T A GLOBAL GRANT FUND?

The Rotary Foundation has rules for what Global Grants can fund

Global Grants can fund

- Toilet Blocks
- Sanitation Systems
- Access Roads
- Water or irrigation systems
- Hospital Equipment
- School Desks
- And much more

Global Grant cannot fund

- Purchase of land or buildings
- Excessive/Continuous support to one beneficiary
- Fundraising
- Activities for which cost has already incurred
- Project signs over \$1,000
- And more

For more information, please read '**Terms and Conditions for Rotary Foundation Global Grants**' which can be downloaded from the Rotary website, www.rotary.org

COMMUNITY NEEDS ASSESSMENT MANDATORY

- Every Global Grant application must include a Community Assessment for the project.
- A Community Assessment is a document analyzing the current situation for the community or area of your proposed project. You will evaluate the Strengths, Weaknesses, Assets and Needs of the Community.
- You should also state the outcome of your projects and how you will measure the results
- There are different methods to do a Community Assessment. A Guide can be found on www.rotary.org
- Very important that the benefitting community is actively involved in the project. Without their support, the project won't succeed!

COMMUNITY ASSESSMENT TOOLS

The Rotary Foundation recommends six community assessment tools to use.

- Community Meeting
- Survey
- Interview
- Focus Group
- Asset Inventory
- Community Mapping

Each tool has pros and cons and should be chosen depending its suitability to the specific project.

Download and read: [COMMUNITY ASSESSMENT TOOLS A resource for Rotary projects \(605-EN\)](#)

SUSTAINABILITY KEY FOR GLOBAL GRANT

Rotary Foundation definition of sustainability:

Provide solutions to community needs in such a way that the benefiting community can maintain the activities after grant funding ends

- ❖ Community needs
N.B. A Community Assessment is mandatory for a Global Grant application
- ❖ Appropriate technology
- ❖ Sustainable funding
- ❖ Knowledge transfer
- ❖ Motivation
- ❖ Monitoring and evaluation

SUSTAINABILITY

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.





GLOBAL GRANT FINANCING

A Global Grant project may include the following financing items.

- Club Cash Contributions
- Non-Rotarian Cash Contribution
- DDF (District Designated Funds) from Districts
- TRF Award from the World Fund; 80% of all DDF in the project
- ***NB! The Rotary Foundation is only matching DDF***

DDF MATCHING OF CLUB CASH FOR GLOBAL GRANTS

- Districts decide how their DDF is allocated to projects
- D7070 has the following rule for matching cash from D7070 Clubs in Global Grant projects
 - *Club cash may be matched 1:1 up to \$5,000 per Club and project*
- Each Global Grant project will require some DDF, as The Rotary Foundation is only matching DDF (80%) , coming from the Foundation's World Fund
- Only cash contributions from Clubs in D7070 will be matched with DDF from D7070
- Cash contributions by D7070 Clubs to Global Grant projects in other Districts may be matched.

GLOBAL GRANT CALCULATOR – AN EXAMPLE

Please list all financing and indicate Cash or District Designated Fund (DDF) amounts.

Global Grant Financing Planner

Application #	GG2012345		Project Country	Utopia	
DDF (USD)	Cash Direct to Project (Equiv USD)	Cash through TRF (Equiv USD)			
		Project Cash	5%	Total to TRF	

1. Host Rotary Clubs/Districts

District 1234	\$ 5,000	\$ -	\$ -	\$ -	\$ -
Rotary Club of ABC		1,000			
Rotary Club of DEF			3,000	150	3,150
Total Host Contributions	\$ 5,000	\$ 1,000	\$ 3,000		\$ 9,000 23%

2. International Rotary Clubs/Districts

District 7070	\$ 10,000	\$ -	\$ -	\$ -	\$ -
Rotary Club D7070 A		5,000			
Rotary Club D7070 B			3,000	150	3,150
Rotary Club of D7070 C			5,000	250	5,250
Rotary Club nonD7070 A		1,500			
Rotary Club nonD7070 B			2,000	100	2,100
District 7080	3,000				
Total International Contributions	\$ 13,000	\$ 6,500	\$ 10,000		\$ 29,500 77%¹

	\$ 18,000	\$ 7,500	\$ 13,000	Total Rotarian Contributions	\$ 38,500 100%
3. TRF World Fund match (80% of DDF)	\$ 14,400			World Fund match	14,400²
4. Endowed/Directed Gift #	T12345		\$ 10,000	(5% NA)	10,000
5. TRF Donor Advised Fund			\$ 5,000	(5% NA)	5,000
				Total Global Grant Funding	\$ 67,900³

6. Other donors (unmatched)

MNO Foundation	\$ 2,000	\$ -	\$ -	\$ -
PQR Corporation		5,000	250	5,250
				7,000 ⁴
Total Project Funding (must be equal to budget)				\$ 74,900

Clubs have two options when paying their cash contribution to a project

- > pay to The Rotary Foundation; add 5% and get Paul Harris credits
- > pay directly to the project's specific bank account (most often with Host Partner); no 5% admin fee, no Paul Harris credits

STEWARDSHIP – IT IS HARD EARNED MONEY

Stewardship is the responsible management and oversight of grant funds, including:

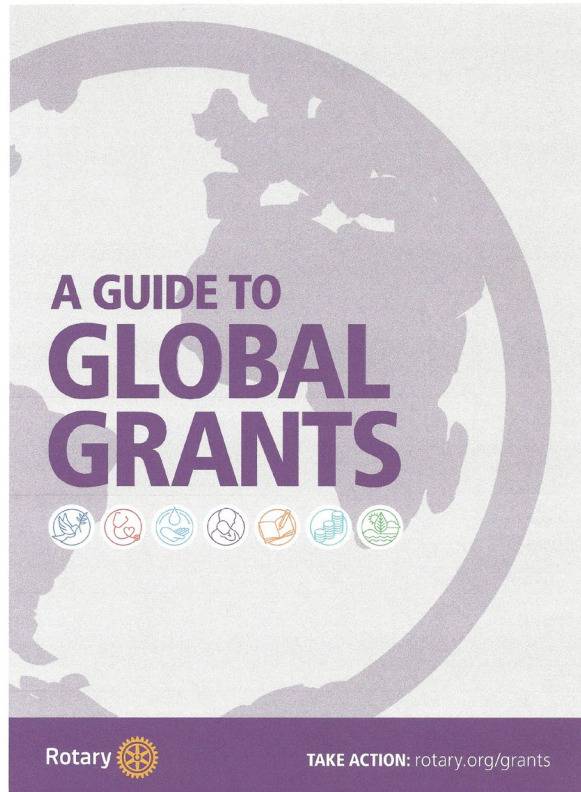
- Rotarian supervision, i.e. a three member committee
- Financial records review, i.e. book-keeping, storage of documents
- Oversight of funds, i.e. separate project bank account
- Reporting irregularities, i.e. conflict of interest, funds can't come from beneficiaries nor other grants
- The whole Club is responsible against The Rotary Foundation
- Timely submission of reports is a MUST.
- Follow local laws

GLOBAL GRANT REPORTING REQUIREMENTS

- Progress reports
 - Within 12 months of first payment
 - Every 12 months through the life of the grant
- Final report within 2 months of completion
- Reporting for Global Grant projects are done on-line
- ***If Clubs fail to meet the reporting requirements, they and the District may be removed from the Grants program.***

D7070 has the same rules for District Grant Projects

REQUIRED READING FOR GLOBAL GRANTS



- Everyone applying for a Global Grant should read
 - Terms and Conditions for Rotary Foundation Global Grants
 - A Guide to Global Grants
- Both can be downloaded from the RI website
- Content also applicable for District Grant projects
- ***Always contact District before you start if you want DDF for the project***

GLOBAL vs. DISTRICT GRANTS

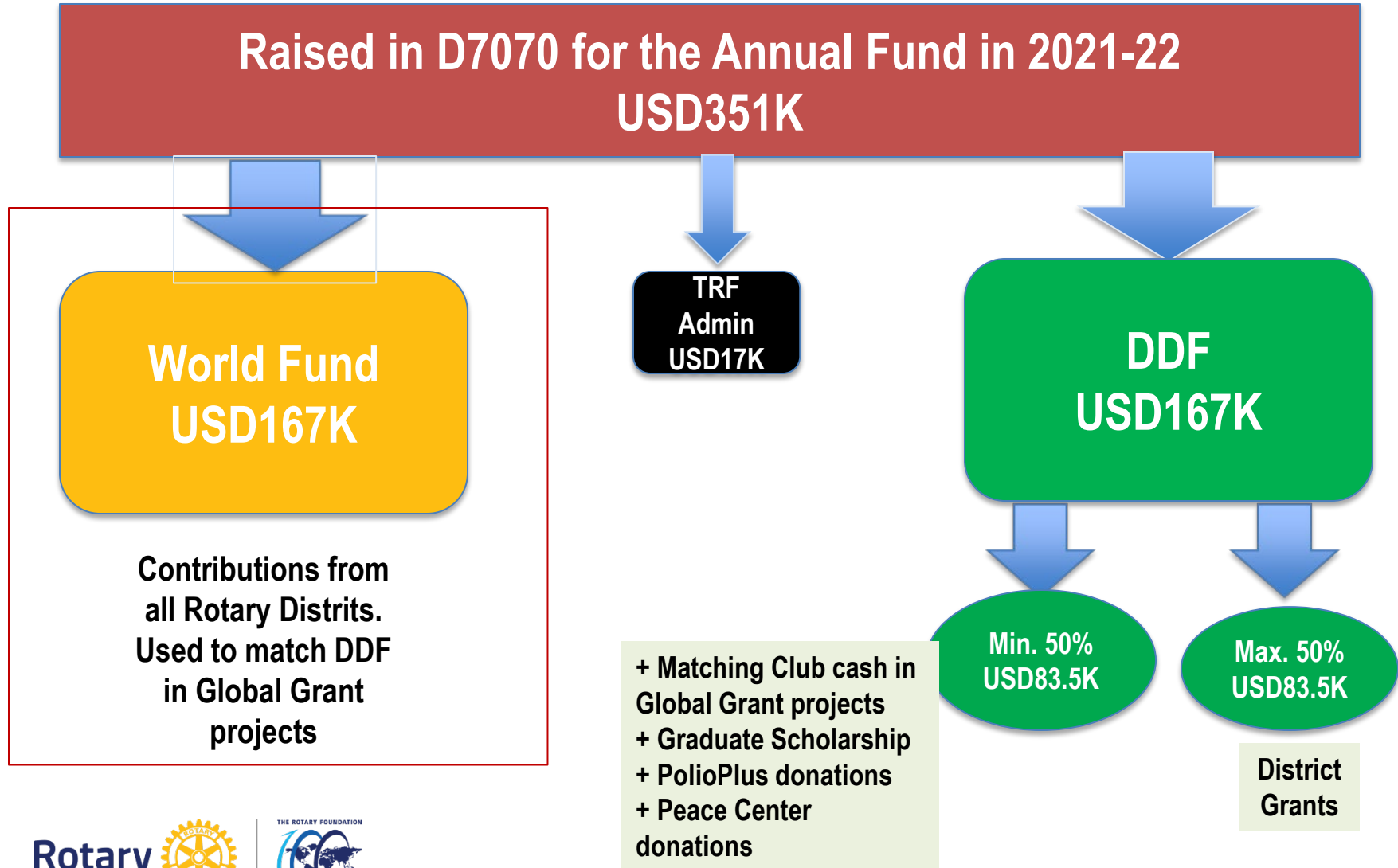
Global Grants

- Long-term
- Administered by TRF
- Application/reporting on-line at Rotary's Grant Centre
- Applications anytime in the year
- Must relate to one or more of the seven areas of focus
- Must be sponsored by one Host Club/District where the project takes place; one International Club/District outside that area
- Budget >USD30,000
- Humanitarian Projects, VTT & Graduate level Scholarships

District Grants

- Short-medium term
- Administered by the District
- Must support The Rotary Foundation's mission
- **Clubs apply to the District**
- **Can be used for local and international projects**
- Can also be used for projects in areas with no Rotary Clubs
- No minimum budget amount
- Districts are free to develop their own policies, procedures & rules, such as the **May 31, 2024 dead-line for applications.**

THE SHARE SYSTEM – ANNUAL FUND – 2024-25



DISTRICT GRANT PROCESS FOR YEAR 2024-25

- Clubs submit District Grant applications for 2024-25 by May 31, 2024, using a special form found on the District's website
- Club Applications are summed up in District's Spending Plan = District's Block Grant application to TRF (July 15, 2024)
- TRF reviews and approves the Spending Plan (July/Aug. 2024)
- D7070 receives a District Block Grant (August 2024)
- Funds are distributed to Clubs (September 2024)
- Clubs complete projects, file final reports
- District files final report for the District Block Grant to TRF
- TRF approves D7070 final report and closes the Grant

Responsible:

Club

District

TRF



DISTRICT GRANTS FINANCING

To encourage Club cooperation, District 7070 uses a funding model that gives more funds/participating Club based on the number of Clubs in the project. District 7070 will only match contributions from D7070 Clubs.

Clubs in the Project	1 - 2	3 – 4	5 and more
Club Cash vs DDF (max)	1 : 0.50	1 : 0.75	1 : 1
Max DDF/Club & Project	1,000	1,500	2,000
Max. DDF in project	2,000	6,000	9,000

Please, note actual grant amount may be less than maximum possible, due to limitations of funds available

DISTRICT GRANT PROJECTS – 3 examples

Example A, 1 Club (1:0.50)

Project budget	\$5,000
Club Cash	\$4,000
District Grant	\$1,000

Example B, 3 Clubs (1:0.75)

Project budget	\$9,750	
Club A	\$3,000	\$1,500
Club B	\$2,000	\$1,500
Club C	\$1,000	<u>\$ 750</u>
District Grant	\$3,750	← \$3,750

Example C, 5 Clubs (1:1)

Project budget	\$19,500	
Club A Cash	\$5,000	\$2,000
Club B	\$3,500	\$2,000
Club C	\$2,000	\$2,000
Club D	\$1,000	\$1,000
Club E	\$ 500	<u>\$ 500</u>
District Grant	\$7,500	← \$7,500

All examples are assuming maximal matching, which may or may not be the case

DISTRICT GRANT REPORTING REQUIREMENTS

D7070 has set the same reporting rules for District Grant Projects as there are for Global Grant projects

- Final report within 2 months of completion
- Progress reports, if the project takes more than 12 months to complete.
 - Within 12 months of payment
 - Every 12 months through the life of the grant
- Reporting for District Grant projects are done on a Report form found on the District's website, www.rotary7070.org



PROGRAM OF SCALE GRANTS

- A new grant program, designed to respond to a community identified need that benefits a large number of people
- **One grant** of this type will be awarded **worldwide** each year, based on a competitive application process
- Positive if the structure of the project can be adapted for use in similar situations around the world
- Project expected to last for 3 – 5 years
- Sponsored by a Rotary Club and/or District, cooperation with other organizations for implementation is a requirement
- Award can be up to USD2 million
- Application dead-line March 1 each year



ROTARY DISASTER RESPONSE GRANTS

- Districts affected by natural disasters can use Rotary disaster response grants to launch their own projects or work with established relief organizations to help their communities recover. Grant funds can be used to provide basic items such as water, food, medicine, and clothing. Districts should work closely with local officials and groups to ensure that the funding will meet a specific community need.
- Qualified Rotary districts in an affected area or country may apply for a maximum grant of \$25,000, based on the availability of funds. A district may apply for subsequent grants after it successfully reports outcomes from previous grants.
- The district governor and district Rotary Foundation chair complete the Rotary Disaster Response Grant Application and send it to grants@rotary.org.
- Special rules for grants to Ukraine

WANT TO LEARN MORE ...

- **Rotary's website**

- ☐ Visit Grant Center, reached via Take Action in the top bar at www.rotary.org after signing in on the website
- ☐ Global Grant Monitoring and Evaluation Plan Supplement
- ☐ Terms and Conditions for Rotary Foundation District Grants
- ☐ A Guide to Global Grants (1000en)
- ☐ Global Grant Calculator <https://my.rotary.org/en/take-action/apply-grants/global-grants>
- ☐ Rotary Foundation Reference Guide (219en)
- ☐ How to use the Global Grant Center
- ☐ Global Outlook – Funding model
- ☐ Terms and Conditions

- **District 7070**

- ☐ Website www.rotary7070.org
- ☐ Committees
 - District Water Committee/World Community Service Committee
 - District Foundation Grants Sub-Committee
- ☐ Members & Clubs that have completed Grants

YOUR CLUB IS QUALIFIED – *once ...*



- ...
- at least two Club members have attended the seminar November 18, 2023, or completed the three on-line Qualification Training modules for the Rotary year 2024 – 25, and
 - your Club has signed the MOU
 - Record of Qualified Clubs will be kept on the District's website

Only Qualified Club Can Apply for Grants

For more information: PDG Lars Henriksson

pdglars.henriksson@gmail.com

Thank You

