

DOING GOOD IN THE WORLD

From Foundation Walk to Grants

2021-2022 D7070 Qualification Seminar

Module 1 – The Rotary Foundation

Module 2 – Global Grants

Module 3 – District Grants



THE FOUNDATION'S MISSION



Advance World Understanding, Goodwill & Peace through the improvements of health, the support of education, and the elevation of poverty

Rotary



THE ROTARY FOUNDATION'S THREE FUNDS

Donations to The Rotary Foundation can be directed to one of the following three funds

❖ 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

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 <50 (2 countries) in 2021
- Rotary has contributed >USD1.6 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 six universities around the world
- Districts nominate by July 1 for worldwide competition
- Funded by DDF, Endowment Fund & World Fund

❖ Grants

- District Grants & Global Grants
- Funded by DDF & World Fund

WHO CAN PARTICIPATE IN THE GRANTS PROGRAM?

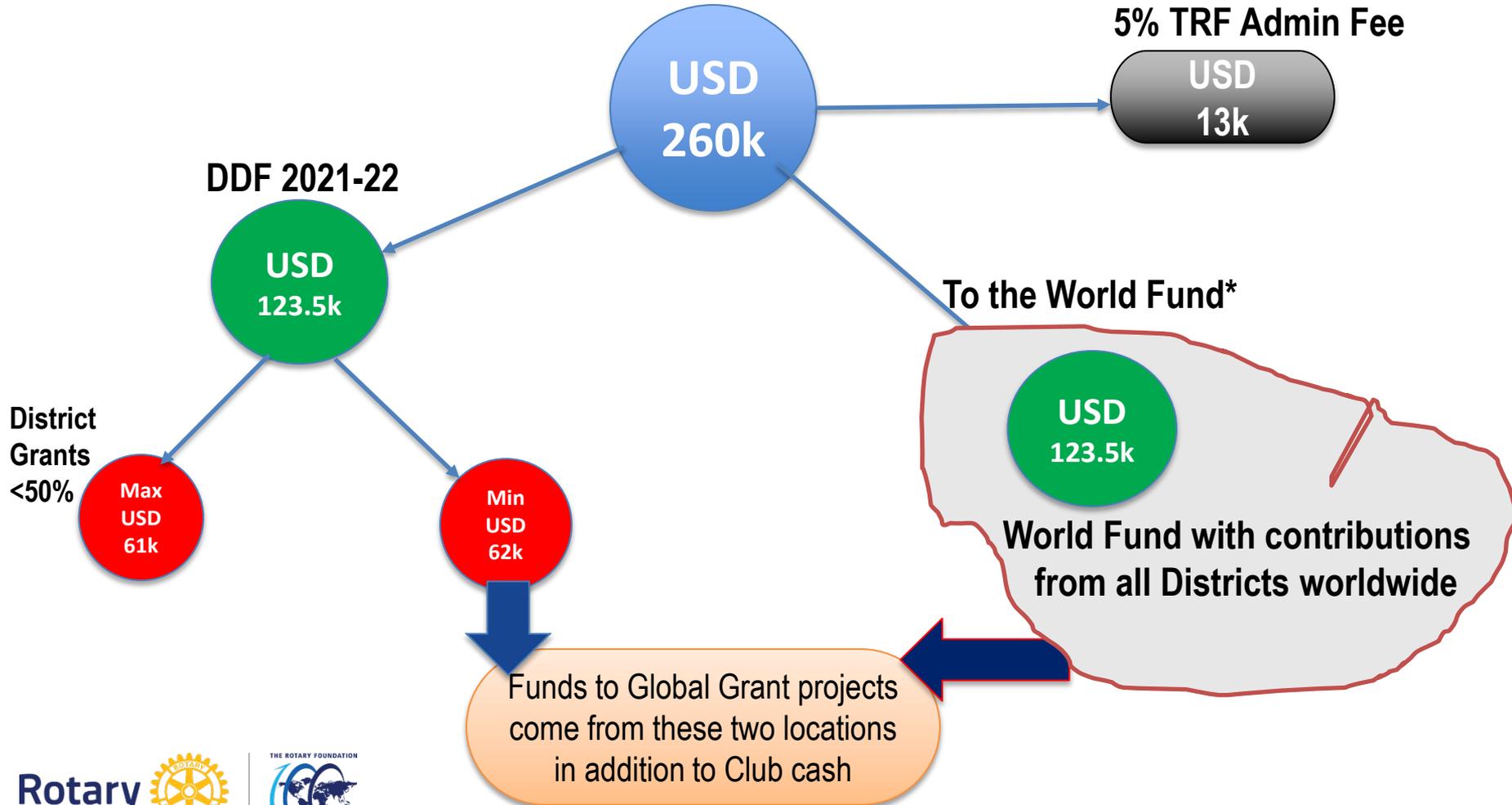
The Rotary Foundation requires, that Clubs that want to participate in the Grants program, must

- have min. 2 members complete the District's Qualification Training (the three on-line modules represent the training), &
- 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 whole Club is qualified. Not just the two members who took the on-line training.

THE SHARE SYSTEM – ANNUAL FUND

Funds raised by D7070 in 2018-19



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, 2021 dead-line for applications & matching policy

SEVEN AREAS OF FOCUS FOR GLOBAL GRANTS



Basic
Education
& Literacy



Maternal &
Child
Health



Peace &
Conflict
Prevention/
Resolution



Disease
Prevention
&
Treatment



Water,
Sanitation
& Hygiene



Community &
Economic
Development

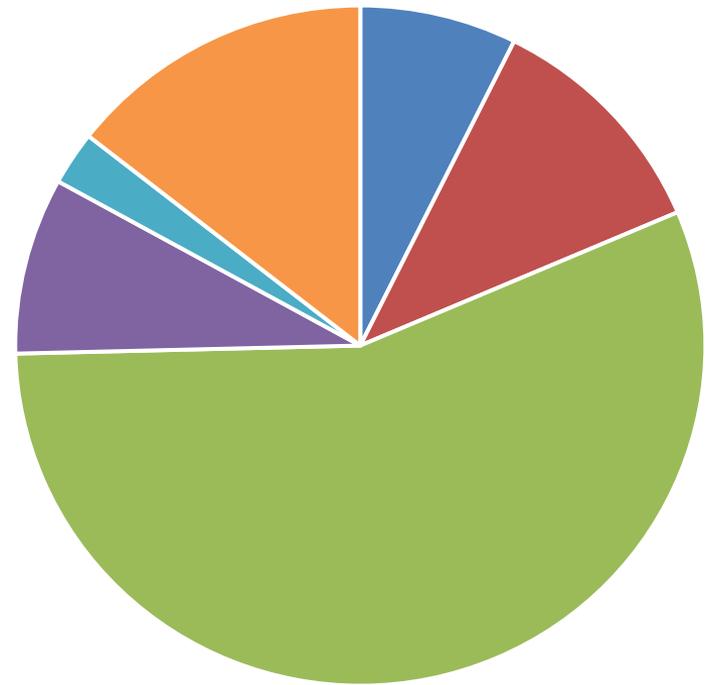


Support the
Environment

- ❖ Basic Education & Literacy
- ❖ Maternal & Child Health
- ❖ Peace & Conflict Prevention/Resolution
- ❖ Disease Prevention & Treatment
- ❖ Water, Sanitation & Hygiene
- ❖ Community & Economic Development
- ❖ Support the Environment

USD 106 MILLION TO 1,359 GLOBAL GRANTS

USD (million)



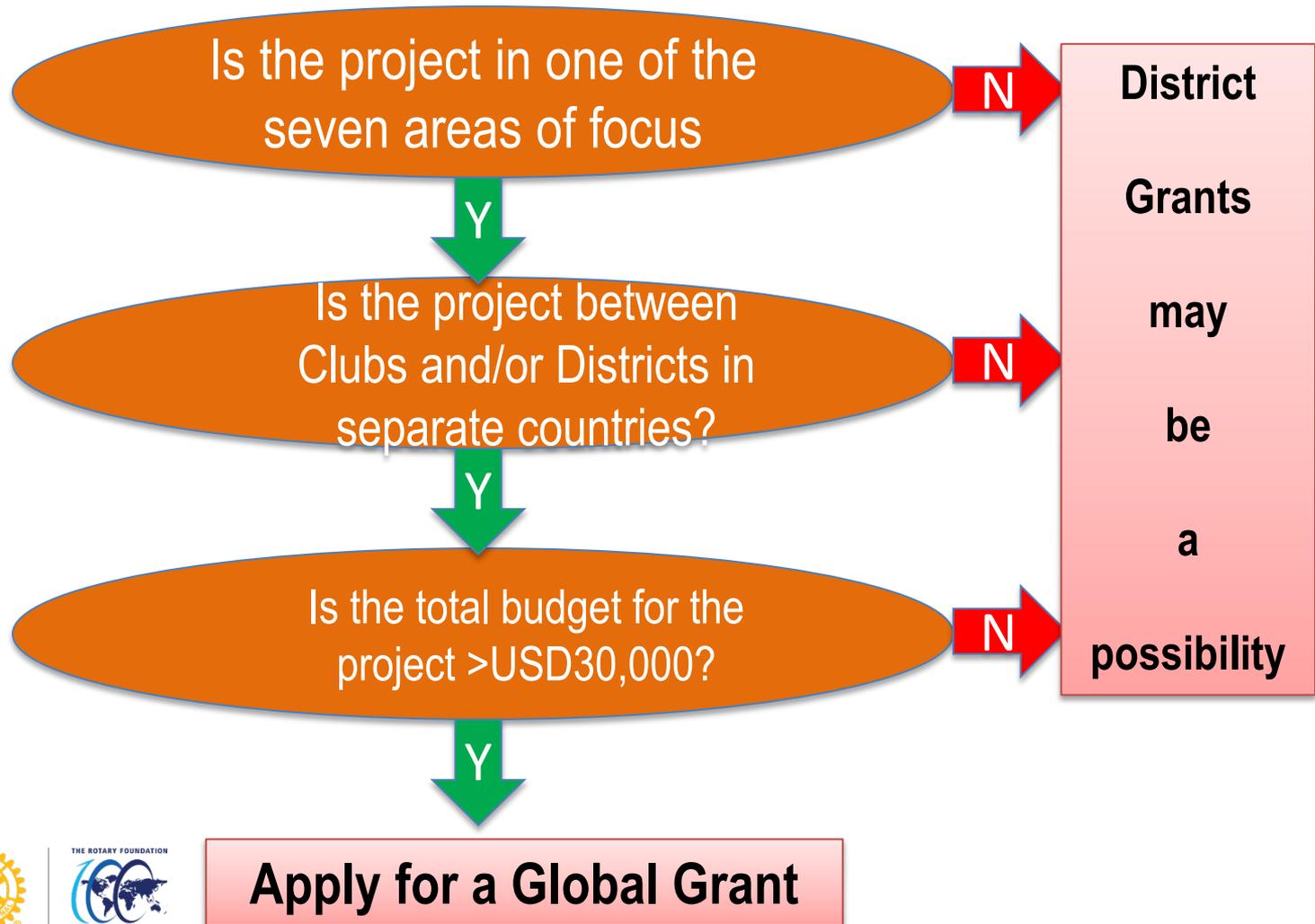
- Supporting Education (113)
- Growing Local Economies (170)
- Fighting Disease (729)
- Saving Mothers & Children (101)
- Promoting Peace (57)
- Clean Water & Hygiene (189)



Represents 2019-20 Rotary year

GLOBAL or DISTRICT GRANT?

- **Three simple questions to ask**



GLOBAL GRANT CYCLE



Draft

Rotary members plan a project or scholarship and build their grant application online

Talk to district leaders about potential DDF for the project.

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
Meet reporting dead-lines

HOW TO START A GLOBAL GRANT APPLICATION

- 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 '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**

BUT BEFORE YOU START ...

Before you start working on your on-line Global Grant application, please

- From the Grant Center site on www.rotary.org, download and read “Terms and Conditions for Rotary Foundation District Grants and Global Grants” as well as “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 if to discuss any DDF for your project. Fill out the **DDF Request Form**, available on www.rotary7070.org and send it to the District. There is just so much DDF available 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
- Look in the right-hand column of the ‘Apply for a Grant’ among the documents found under Grant Resources. Each project is different; rules and requirements may affect your application differently.

COMMUNITY NEEDS ASSESSMENT MANDATORY

- Every Global Grant application requires a Community Needs Assessment as part of the application for the proposed project.
- A Community Needs 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 conduct a Community Needs 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 NEEDS ASSESSMENT TOOLS

The Rotary Foundation recommends six community assessment tools to choose from

- 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 PROJECTS

Rotary Foundation definition of sustainability:

Providing 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 Needs Assessment is mandatory for a Global Grant application
- Appropriate technology
- Sustainable funding
- Knowledge transfer
- Motivation
- Monitoring and evaluation



SIX TIPS FOR MORE SUCCESSFUL PROJECTS

Here are six elements of sustainability that must be addressed in the design of a global grant project:

- Start with the community and their needs
- Encourage local ownership to get buy-in
- Provide training to build local know-how and capacity
- Buy local to get community involvement as well as suitable technology and products for the area
- Find local funding for days when Rotary grant is used
- Measure your success to learn for the future

GLOBAL GRANT APPLICATION FORM

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

i 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](#)

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)
- The Host Club/District is 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 contribute financially to the project. But ask!

GLOBAL GRANT FINANCING

A Global Grant project can include the following financing items.

- Club Cash Contributions
- Non-Rotarian Cash Contribution
- DDF (District Designated Funds) from the Districts
- TRF Award from the World Fund; 80% of the DDF in the project (after July 1, 2021)
- ***NB! The Rotary Foundation is only matching DDF***

DDF MATCHING OF CLUB CASH FOR GLOBAL GRANTS

- Districts decide how 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%)
- 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 – AN EXAMPLE OF FINANCING

Source		USD	Subtotals	Comments
Clubs	D7070	25,000		
	Non-D7070	10,000	35.000	
DDF	D7070	15,000		D7070 may match 1:1, max. 5K/Club & Project
	Non-D7070	5,000	20.000	
TRF	DDF Matching	16,000	16,000	80% of DDF, after July 1, 2021
Total			71,000	Must equal the total amount for the budget

STEWARDSHIP – IT IS HARD EARNED MONEY

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

- Rotarian supervision, e.g. three member committee
- Financial records review, e.g. book-keeping, storage of documents
- Oversight of funds, e.g. separate project bank account
- Reporting irregularities, e.g. conflict of interest, funds can't come from beneficiaries nor other grants
- The whole Club is responsible visavi The Rotary Foundation
- Timely submission of reports.
- 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 set the same rules for District Grant Projects

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

YOUR CLUB IS QUALIFIED – *once ...*



- ...
- at least two Club members have completed the on-line Grant Qualification Training for the Rotary year 2021 – 22, and
 - your Club has signed the MOU
 - Record of qualified Clubs will be kept on the District's website

For more information:
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Thank You