



District 9800 The Rotary Foundation Grants Seminar 2023

Grant Hocking

District Rotary Foundation
Chair (DRFC)

Richard Blakeman

District Rotary Foundation
Grants Chair (DRFGC)



Program

- Foundation overview – Value and Funding
- Global Grants
- District Grants
- Stewardship – governance requirements



Take Action to Create Change

ROTARY
STATEMENT

Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

The Rotary Foundation's Motto & Mission

“Doing Good in the World”

The **mission** of the Rotary Foundation is to enable Rotarians to advance **world understanding, goodwill and peace** by improving **health, providing quality education, improving the environment, and alleviating poverty.**





PEACEBUILDING AND
CONFLICT PREVENTION



PROMOTING
PEACE



DISEASE PREVENTION
AND TREATMENT



FIGHTING
DISEASE



WATER, SANITATION,
AND HYGIENE



PROVIDING
CLEAN WATER



MATERNAL AND
CHILD HEALTH



SAVING
**MOTHERS &
CHILDREN**



COMMUNITY ECONOMIC
DEVELOPMENT



GROWING
LOCAL ECONOMIES



BASIC EDUCATION
AND LITERACY



SUPPORTING
EDUCATION



ENVIRONMENT



PROTECTING
ENVIRONMENT

The Value of the Rotary Foundation

Why should I or my Rotary Club support The Rotary Foundation?



What does it offer?

- **My Rotary club**
- **My Rotary District**
- **The World**



4
star charity - Charity
Navigator's highest level



91%
of funds are spent on
program awards and operations

The
Rotary
Foundation



Successful Rotary Projects

Every Rotary Project anywhere in the world started with **a Rotarian** who had an idea

They developed that idea by using the powerful network of Rotary and the funding engine of **The Rotary Foundation**

To Make a Real Difference in the world

THE ROTARY FOUNDATION



Humanitarian Aid

THE ROTARY FOUNDATION



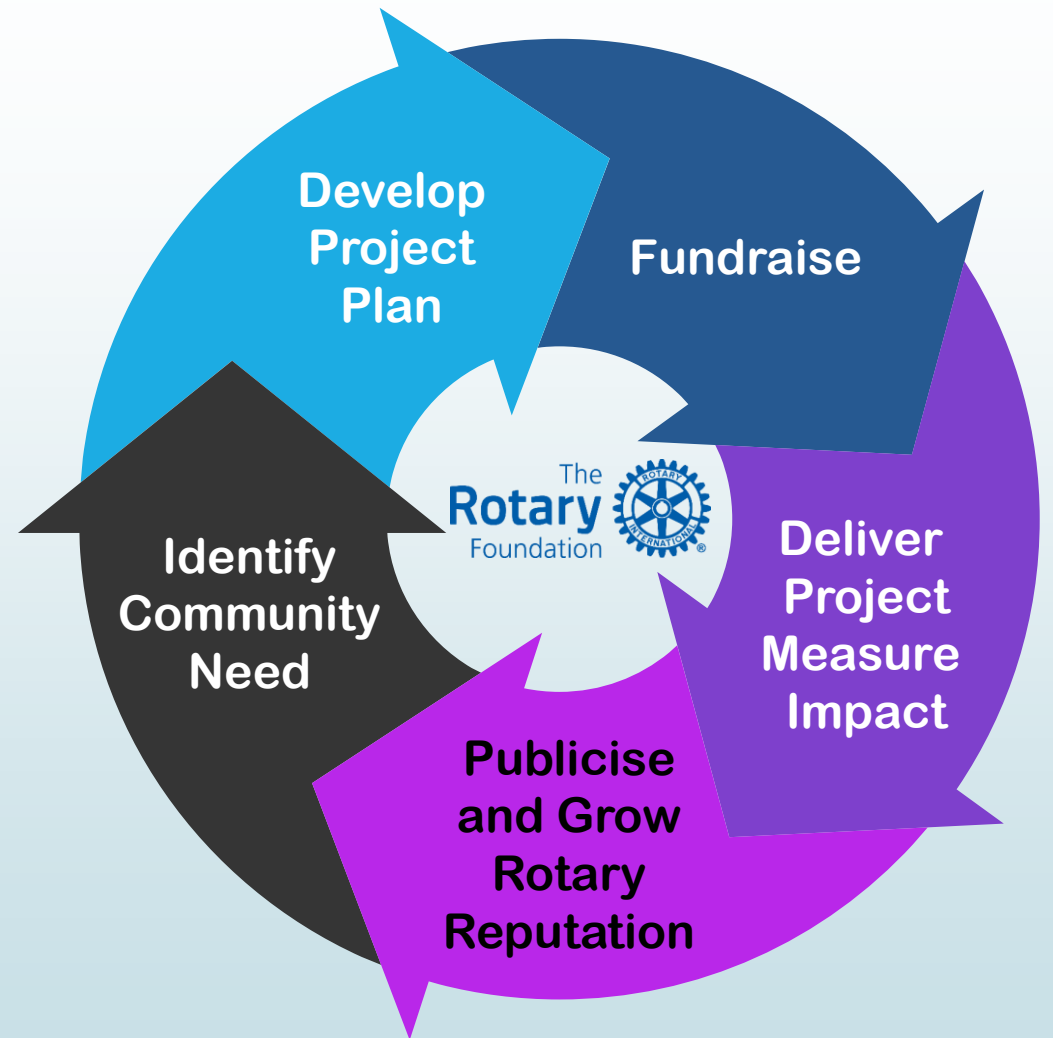
Education Programs

Building the Rotary brand through The Rotary Foundation

Focus on what your Club does and the
benefits of doing so.

Every Project to INCLUDE the **ROTARY**
Name.

Perception change to **ROTARY** doing!



A Foundation Grant?

1. Your projects / Our projects
2. Support for Grant applications
3. Leverage club funding
4. Projects are based on a community need
5. Linked to an Area of Focus
6. Higher level of Rotarian Engagement
7. Strengthen member commitment
8. Projects are sustainable
9. Building the ROTARY brand
10. Project learnings that are transferable to other Clubs/Districts
11. Encourage collaboration
12. Greater skills bank
13. Grow your Rotary network
14. A robust project governance structure
15. Increased trust and confidence in Rotary- Trusted brand

The Rotary Foundation

The Rotary Foundation couldn't do its great work without your support and the support of Rotary clubs.

**Donate to the Rotary Foundation.
Individuals and Clubs.**

**Support Rotary to
make a difference.**

Think Foundation First.



The Rotary Foundation

Think Foundation First.

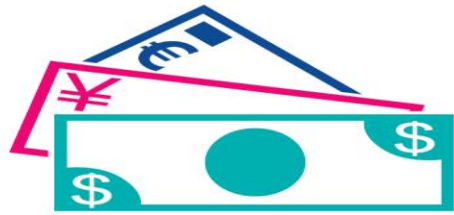
There are several ways you can support The Rotary Foundation:

- **Every Rotarian Every Year** – **Donate any amount per year**
- **Centurion Program** - AUD \$100 per year or \$25 per quarter
- **Polio Plus Society** – **us \$100** (AUS \$160)
- **Paul Harris Society** – ^{US}\$1000 per year or ^{AUD}\$130 per month
- **Benefactor** – Leave ^{US}\$1000+ in your will
- **Bequest Society** – Leave ^{US}\$10,000 in your will

- **Ensure that your club makes its annual donation to the Annual Fund and Polio Plus.**

my.rotary.org/en/donate
rotarydistrict9800.org.au

The Rotary Foundation



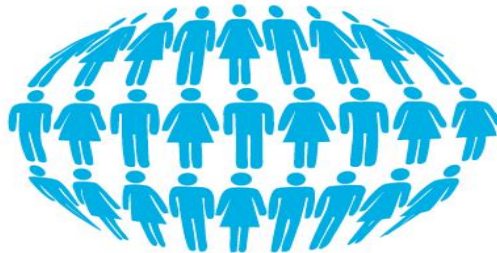
Donation to
Annual Fund
SHARE

Donation is invested for
3 years; growth supports
Foundation operations.



SPENDING DECISIONS SHARED

World Fund
(Trustee discretion)



**GLOBAL
GRANTS AND
PROGRAMS***

**District
Designated
Funds (DDF)**
(District discretion)



**DISTRICT
GRANTS**

**GLOBAL
GRANTS**

*Includes PolioPlus, Rotary Peace Centers, other districts,
and the Endowment Fund (areas of focus)

Global Grants



Global grants support large international activities with sustainable, measurable outcomes in Rotary's areas of focus. By working together to respond to real community needs, clubs and districts strengthen their global partnerships.

Global Grants support - bigger, better, bolder

Global Grants can fund:

- Humanitarian projects
- Postgraduate Scholarships
- Vocational Training Teams

Minimum project size = \$^{US}30,000

Qualification:

Both the district or club in the country where the activity is carried out, and the international partner, district or club, must first become qualified before applying for a global grant.



Our Areas of Focus - Our critical causes



Peacebuilding and conflict prevention



Fighting disease



Water, sanitation, and hygiene



Maternal and child health



Basic education and literacy



Community economic development



Supporting the environment



Let the District Grants committee know what you are planning.

We can provide advice and help guide you in the right direction.

What makes a successful Global Grant?



Applications are accepted throughout the year

Read the Guide to Global Grants



Read the relevant chapters

1 MAKE A SUSTAINABLE IMPACT

At Rotary, we want our projects to have a lasting impact. Long after the vocational training team goes home, the scholar finishes her studies, and your club has submitted its final report on your project to the Foundation.

2 PARTNER TO MAXIMIZE YOUR IMPACT

Collaboration is as much a part of Rotary as service is. We bring together leaders, within our community and worldwide, to exchange ideas and take action. We feel the best collaboration takes place when leaders of different cultures work together on a project. That's why we've made international partnerships a required element of global grants.

3 PLAN YOUR GLOBAL GRANT-FUNDED PROJECT

A thorough project plan sets your project up for success. Clearly assign responsibilities. Collect baseline data and decide how you'll measure the impact of your project. Create a realistic budget.

4 APPLY FOR A GLOBAL GRANT

To apply for a global grant, sign in to My Rotary. If you don't have a My Rotary account, follow our [guide](#) to create one.

5 IMPLEMENT, MONITOR, AND EVALUATE YOUR PROJECT

Rotary honors the commitments we make to our communities. Just as it is important to plan your project, it's also important to follow through with your plan and take responsibility for its outcome.

6 REPORT YOUR PROGRESS AND OUTCOME

Rotary needs to know how your project is doing and the impact it's made so that we can measure and publicize the positive change we make in the world. Our credibility as a service organization depends on good stewardship of funds and effective project management. Reporting on your grant maintains your and your partner's accountability to Rotary, but also to your community, which will be affected by the outcome of the project.

Global Grant - D9800 prerequisite

Global Grant Qualification requirement for District 9800 Clubs:

- Undertake Grant Management Seminar in the Rotary E-Learning Centre
- Compulsory for Project leader
- **Preferred for all project team members (recommend more than 1)**
- Excellent up to date resource

Website:

<https://learn.rotary.org/members/learn>



Successful Global grant applications

Rotary members must be actively involved in all global grants, and all projects must comply with the Terms and Conditions for Rotary Foundation Global Grants

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 need
- **Must have an MOU with the Foundation and lodge with grants committee**

If not it may be eligible for a District grant or other funding options.

Successful Global grant applications

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- maximise your impact
- 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
- Raise funds
- Apply for a grant through the Grant Center
- **Stay up-to-date in reporting for all active grants**
Monitor and evaluate / Financial transparency / Reviews, Visits and Audits

For humanitarian projects and those that involve vocational training teams:

- Conduct a community assessment before applying
- Measure progress toward the outcome

Global Grants

District International Scoping Grants (DGS)

- To assist with community assessments for Global Grant applications, where the project is outside Australia
- Grants are from to a maximum of \$6,000
- Financial contributions from D9800 clubs matched dollar for dollar
- Gather information about the project- engagement, costs, capacity of local suppliers, trades....
- Complete a community needs assessment

How are Global Grants funded:

- ❖ Minimum project budget = \$30,000
- ❖ World Fund provides minimum of US\$15,000 and a maximum of US\$400,000
- ❖ Clubs contribute cash and Districts contribute from their DDF.
 - Approved by our District Grant committee
 - Other Rotary districts can do the same for their clubs if they partner with you on the project.
- ❖ **RI matches at 80% of DDF contribution.**
- ❖ District 9800 as a guideline the common contribution to Global Grants is US\$5k to \$10k depending on size of project and funds available
- ❖ Discretion can be applied by the District Foundation committee.

How are Global Grants funded:

- ❖ Require a partnership with a 'Host Club' in the targeted country
- ❖ At least 30% of the cash contribution must come from outside the Host District.
- ❖ **Administered by Host and International Clubs under the supervision of The Rotary Foundation**
- ❖ Global grants can also be funded with endowed earnings and directed gifts

How are Global Grants funded:

Rotarians and third parties can donate directly to a Global Grant via the My Rotary website.
my.rotary.org/en/donate

Select donation to a Global Grant

- Rotarians sign in
- Non-Rotarians 'Continue as Guest'.

The Donor will get an Australian tax-deductible receipt.

Donate

All fields are required unless marked *optional*.

Choose what you would like to support

< Causes Areas of Focus Endowment **Global Grants**

Global grants support large international activities that have sustainable and measurable outcomes.

Seven-digit grant number

SEARCH

Summary

- Funds available depend upon donations to TRF- your giving can make a difference
 - They are readily available for qualifying projects
 - Well planned and resourced
 - Encourage Service and Collaboration
 - Critical to the continued growth of Rotary
-
- Your District Grants Committee is your resource



Summary

The Rotary Foundation couldn't do its great work without your support and the support of Rotary clubs.

Donate to the Rotary Foundation.
Individuals and Clubs.

Support Rotary to make a difference.

**Think Foundation First.
and Apply for Grants**

The
Rotary
Foundation



CREATE HOPE
in the **WORLD**

District Grants

From The Rotary Foundation

Richard Blakeman

District Rotary Foundation
Grants Chair (DRFGC)

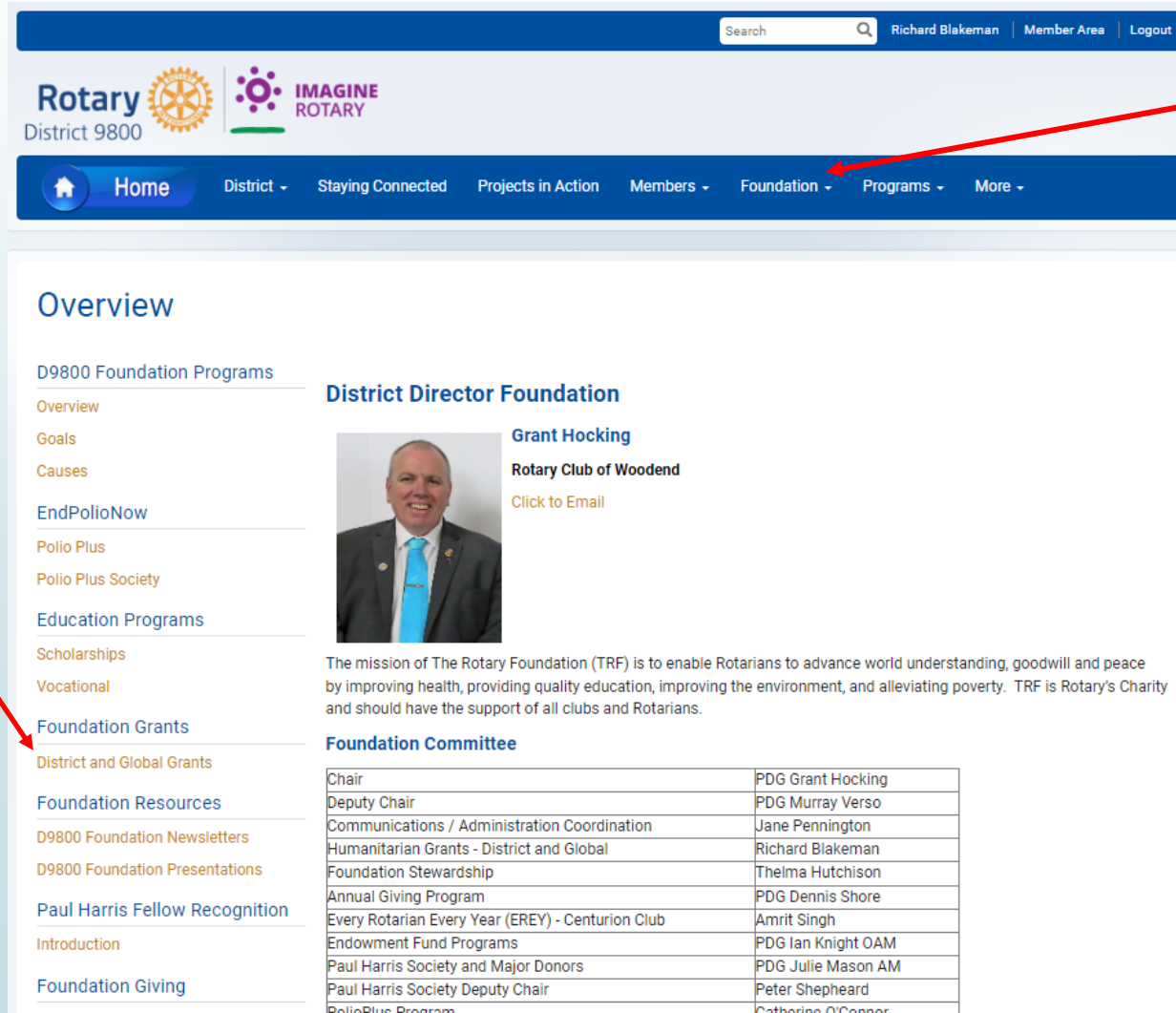
What we will cover

- Why consider a grant?
- Club and project eligibility
- Types of District Grants
- Policies, terms & conditions
- How to apply for a grant
- Stewardship
- Where to get more information



Where to Get More Information?

The District 9800 Website



The screenshot shows the Rotary District 9800 website. At the top, there is a search bar and user information for Richard Blakeman. The main navigation bar includes links for Home, District, Staying Connected, Projects in Action, Members, Foundation, Programs, and More. The Foundation link is highlighted with a red arrow. Below the navigation bar, the Overview section is displayed, featuring a sidebar with links to various programs and a main content area. The sidebar includes links for D9800 Foundation Programs, Overview, Goals, Causes, EndPolioNow, Polio Plus, Polio Plus Society, Education Programs, Scholarships, Vocational, Foundation Grants, District and Global Grants, Foundation Resources, D9800 Foundation Newsletters, D9800 Foundation Presentations, Paul Harris Fellow Recognition, Introduction, and Foundation Giving. The main content area features a section for the District Director Foundation, Grant Hocking, and a table for the Foundation Committee.

Rotary
District 9800

IMAGINE
ROTARY

Search Richard Blakeman Member Area Logout

Home District Staying Connected Projects in Action Members Foundation Programs More

Overview

D9800 Foundation Programs

- Overview
- Goals
- Causes
- EndPolioNow
- Polio Plus
- Polio Plus Society
- Education Programs
- Scholarships
- Vocational
- Foundation Grants
- District and Global Grants
- Foundation Resources
- D9800 Foundation Newsletters
- D9800 Foundation Presentations
- Paul Harris Fellow Recognition
- Introduction
- Foundation Giving

District Director Foundation

Grant Hocking
Rotary Club of Woodend
Click to Email

The mission of The Rotary Foundation (TRF) is to enable Rotarians to advance world understanding, goodwill and peace by improving health, providing quality education, improving the environment, and alleviating poverty. TRF is Rotary's Charity and should have the support of all clubs and Rotarians.

Foundation Committee

Chair	PDG Grant Hocking
Deputy Chair	PDG Murray Verso
Communications / Administration Coordination	Jane Pennington
Humanitarian Grants - District and Global	Richard Blakeman
Foundation Stewardship	Thelma Hutchison
Annual Giving Program	PDG Dennis Shore
Every Rotarian Every Year (EREY) - Centurion Club	Amrit Singh
Endowment Fund Programs	PDG Ian Knight OAM
Paul Harris Society and Major Donors	PDG Julie Mason AM
Paul Harris Society Deputy Chair	Peter Shephard
PolioPlus Program	Catherine O'Connor

Foundation

District and Global Grants

Where to Get More Information?

The District 9800 Website



The Rotary Foundation (TRF)
Rotary District 9800

A GUIDE TO DISTRICT GRANTS 2023-24

District 9800 Grants are available to support Rotary projects anywhere within Australia and overseas.

TYPES OF GRANTS

1. **District Grants – Local Within Australia (DGL).** Are available for small community projects that may be delivered in the club's local community, or anywhere within Australia.
2. **School Scholarships – Year 11-12.** Available to support clubs that offer scholarships for deserving disadvantaged students embarking on Year 11 studies in 2024 (see separate Guidelines).
3. **District Grants – International (DGI).** Are for projects overseas, or projects in Australia that benefit either a country other than Australia or a person who is neither a citizen nor a resident of Australia.
4. **District Grants – International Scoping (DGS).** Are designed to fund an investigation into the potential for a project in a country other than Australia, where a potential Global Grant application is intended.

CLUB ELIGIBILITY

To be considered for a District Grant your District 9800 Rotary Club must:

1. Be current in payment of dues to Rotary District 9800 and Rotary International
2. Have no outstanding Reports on District or Global Grants
3. Have had at least one club member attend a District Grants Seminar in June or July 2023

Why Bother with A Foundation Grant?

1. Leverage club funding
2. Encourage collaboration
 - Greater skills bank
 - Improved quality of projects
 - Grow your Rotary network
 - Strengthen member commitment
 - Strengthen Rotary
3. Provide a robust project governance structure
 - Increased trust and confidence in Rotary

Humanitarian Grants

The amount of funding available for Grants each year is dependent upon the volume of your club and individual donations three years prior

- 25% of the Annual Fund Share contributions available for District Grants
- 25% of the Annual Fund Share for D9800 support for Global Grants
- Balance available to the World Fund

District
Designated
Fund (DDF)

Types of Foundation Humanitarian Grants

The Four Types of District Grant in D9800

1. District Grants Local within Australia (DGL)
2. District International Grants (DGI)
3. District International Scoping Grants (DGS)
4. District Year 11-12 Scholarship Grants

District Grants

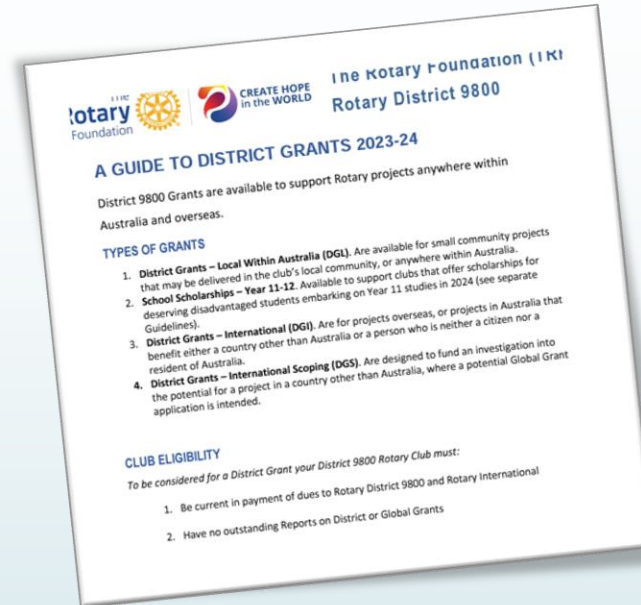
District Grants are administered by the District 9800 Grants Committee under the supervision of The Rotary Foundation in compliance with the Terms & Conditions of The Rotary Foundation and District 9800 Policy

- For smaller activities
- Local With Australia or International
- Easy application process
- Clubs must be qualified

District Grants

Clubs Must Be Qualified to be Considered for a D9800 Foundation District Grant

- Be current in payment of dues to Rotary District 9800 and Rotary International
- Have no overdue reports on District or Global Grants
- Have at least one club member attend the most recent Foundation Grants Seminar
- Be a District 9800 Rotary Club



Types of Grants

District Grants

- Managed by the lead club in accordance with the grant conditions
- Minimum Project Value A\$2000 (Local) and A\$3,000 (International)
- Attract matching Foundation Grants from the District managed 'Block Grant'
- District 9800 can apply for 'Block Grant' funding only once per year (known as 'The Spending Plan')

District Grants

District Grants – General Conditions

- Compliance with The Rotary Foundation T&Cs
- Must support the Mission of The Rotary Foundation
 - “To enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.”
- Must be for a new and discrete project with a defined completion date. Programs must be sustainable
 - If the grant is to establish an ongoing program, the application must define how that program will be sustained after the establishment phase ends

District Grants

District Grants – General Conditions

- Grant approval from The Rotary Foundation must be obtained before committing funds. This is sought through the D9800 Humanitarian Grants Committee
- D9800 grant funding matches funding from D9800 clubs only
- Projects are required to actively engage Rotarians
- Projects must commence within 12 months of grant approval by TRF and must be completed within 24 months of approval
- Publicity plans must be included with the application

District Grants

District Grants – General Conditions

- Funding is limited
- Grant funding offered may vary depending upon available funds
- A club may apply for 1 District Local Grant and 1 District International Grant in the first six months of the Rotary year.
- After that first come first served until funds run out
- Grants paid after final report received

District Grants

1

District Grants Local Within Australia (DGL)

- For small community projects delivered anywhere within Australia
- Active engagement essential.
- Rotarian, Rotary club or Rotary entity may not be the beneficiary of a grant.
- Larger grants are available where more than one club is actively and financially engaged
- MOU may be requested, when partnering with government or commercial entities



District Grants

District Grants Local Within Australia (DGL) Grant Funding Available

Grant funding is offered to match D9800 club funding on a \$1:\$1 basis:

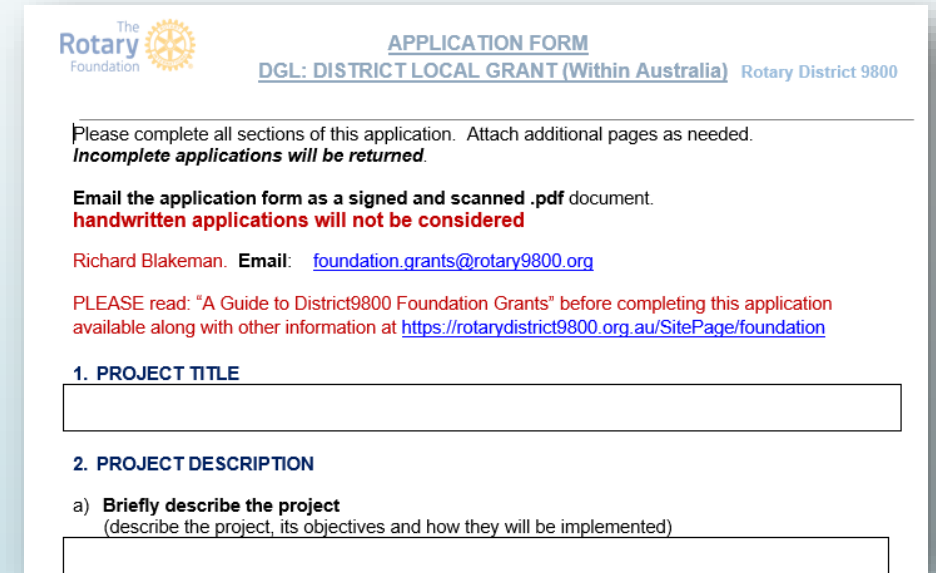


- Single Club Grants: Maximum Grant available \$3,000
- Multi-club Grants: Maximum Grant available \$4,000 per club up to an overall maximum \$12,000

District Grants

District Grants Local Within Australia (DGL) How to Apply

1. Read “A Guide to District Grants 2023-2024”
2. Complete an “Application Form DGL: District Local Grant (Within Australia)”
3. Have it signed and dated by the Club President
4. Scan the form and email it to the Chair of the Humanitarian Grants Committee



The screenshot shows the top portion of an application form. At the top left is the Rotary Foundation logo. To its right, the text reads "APPLICATION FORM" and "DGL: DISTRICT LOCAL GRANT (Within Australia) Rotary District 9800". Below this, instructions state: "Please complete all sections of this application. Attach additional pages as needed. **Incomplete applications will be returned.**" Further down, it says: "Email the application form as a signed and scanned .pdf document. **handwritten applications will not be considered**". Contact information for Richard Blakeman is provided: "Email: foundation.grants@rotary9800.org". A note asks the applicant to read "A Guide to District9800 Foundation Grants" before completing the application, with a link to <https://rotarydistrict9800.org.au/SitePage/foundation>. The form has two main sections: "1. PROJECT TITLE" with a text box, and "2. PROJECT DESCRIPTION" with a sub-section "a) Briefly describe the project (describe the project, its objectives and how they will be implemented)" followed by a text box.

District Grants

District Grants Local Within Australia (DGL) Your application must be accompanied by:

1. Quotes and/or budget worksheets in support of the total planned budget
2. Your Promotional Plan, internally and importantly, externally.
 - Promoting Rotary and your club
 - Promoting the Rotary Foundation
 - Promotion by Program Partners is especially valued

District Grants

2


District International Grants (DGI)

- For discrete projects where there will not be a Global Grant application
- Any overseas project. Australian citizens may not be a beneficiary
- Require an international partner – Overseas Rotary District or Club preferred
- Must fall within one of the seven Areas of Focus of The Rotary Foundation
- Must be accompanied by a fully executed Letter of Participation (LOP)



District Grants

District International Grants (DGI)

 **APPLICATION FORM**

DGI: DISTRICT INTERNATIONAL GRANT Rotary District 9800

Please complete all sections of this application. Attach additional pages as needed.
Incomplete applications will not be considered.

Email the application form as a signed and scanned .pdf document.
handwritten applications will not be considered

Richard Blakeman. Email: foundation.grants@rotary9800.org

PLEASE read: 'A Guide to District 9800 Foundation Grants' before completing this application
available along with other information at <https://rotarydistrict9800.org.au/SitePage/foundation>

1. PROJECT TITLE

2. PROJECT DESCRIPTION

a) **Area of Focus** and Country where Project will take Place


TRF Area of Focus:	
Country:	

b) Briefly describe the project
(describe the project, its objectives and how they will be implemented)

District 9800 TRF International Grant Application 2022-23 Page 1

Areas of Focus

- Promoting peace
- Fighting disease
- Providing clean water, sanitation and hygiene
- Saving mothers and children
- Supporting education
- Growing local economies
- Protecting the environment

 **LETTER OF PARTICIPATION
DISTRICT INTERNATIONAL GRANT**

(please delete headings that are not applicable)

BETWEEN	DISTRICT 9800 CLUB	named:	
and	HOST ROTARY CLUB	named:	
and	COOPERATING ORGANISATION	named:	

SUBJECT	Grant Title:	
	Project Location:	

PURPOSE OF THIS DOCUMENT

A **cooperating organisation** is any reputable non-Rotary organisation that provides expertise, infrastructure, advocacy, training, education and/or other support for the grant project. Cooperating organisations must comply with all reporting and auditing activities required by the Rotary Foundation and provide all receipts and proof of purchases. This document serves to establish a framework of cooperation and agreement between the aforementioned parties as it pertains to the implementation of a project financed by a Rotary Foundation Grant.

PRIMARY CONTACTS FOR EACH PARTICIPATING ENTITY

Contact for: DISTRICT 9800 CLUB

Name	
Email	

Contact for: HOST ROTARY CLUB

Name	
Email	

Contact for: COOPERATING ORGANISATION

Name	
Email	

UNDERSTANDINGS

- All parties affirm that this Grant is initiated, controlled, and managed by the Rotary Club(s) and /or District(s) involved in the project
- The Rotary Club(s) affirm that the Cooperating Organisation (if applicable) is reputable and responsible and acts within all governing laws or the project country

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District Grants

District International Grants (DGI) Grant Funding Available

Grant funding is offered to match D9800 club funding on a \$1:\$2 basis*:

Single and Multi-Club Grants


- Minimum Grant value \$1,000, minimum project \$3,000
- Maximum Grant \$8,000

*e.g. Club contributes \$2,000, Foundation contributes \$1,000

District Grants

District International Grants (DGI) How to Apply

1. Read 'A Guide to District Grants 2023-2024'
2. Complete an 'Application Form DGI: District International Grant'
3. Have it signed and dated by the Club President
4. Complete a Letter of Participation
5. Have it signed by the representatives of all partners in the project
6. Scan the forms and email them to the Chair of the Humanitarian Grants Committee

 **APPLICATION FORM**
DGI: DISTRICT INTERNATIONAL GRANT Rotary District 9800

Please complete all sections of this application. Attach additional pages as needed. Incomplete applications will not be considered.

Email the application form as a signed and scanned .pdf document. Handwritten applications will not be considered.

Richard Blakeman, Email: foundation.grants@rotary9800.org

*PLEASE read: "A Guide to District 9800 Foundation Grants" before completing this application available along with other information at <https://rotarydistrict9800.org.au/SitePages/Foundation>


1. PROJECT TITLE

2. PROJECT DESCRIPTION

a) Area of Focus and Country where Project will take Place

IRF Area of Focus:	_____
Country:	_____

b) Briefly describe the project (describe the project, its objectives and how they will be implemented)

 **LETTER OF PARTICIPATION**
DISTRICT INTERNATIONAL GRANT

(please delete headings that are not applicable)

BETWEEN	DISTRICT 9800 CLUB	named:	_____
and	HOST ROTARY CLUB	named:	_____
and	COOPERATING ORGANISATION	named:	_____

SUBJECT

Grant Title:	_____
Project Location:	_____

PURPOSE OF THIS DOCUMENT

A cooperating organisation is any reputable non-Rotary organisation that provides expertise, infrastructure, advocacy, training, education and/or other support for the grant project. Cooperating organisations must comply with all reporting and auditing activities required by the Rotary Foundation and provide all receipts and proof of purchases. This document serves to establish a framework of cooperation and agreement between the aforementioned parties as it pertains to the implementation of a project financed by a Rotary Foundation Grant.

PRIMARY CONTACTS FOR EACH PARTICIPATING ENTITY

Contact for: DISTRICT 9800 CLUB

Name	_____
Email	_____

Contact for: HOST ROTARY CLUB

Name	_____
Email	_____

Contact for: COOPERATING ORGANISATION

Name	_____
Email	_____

UNDERSTANDINGS

- All parties affirm that this Grant is initiated, controlled, and managed by the Rotary Club(s) and/or District(s) involved in the project.
- The Rotary Club(s) affirm that the Cooperating Organisation (if applicable) is reputable and responsible and acts within all governing laws or the project country.

District Grants

District International Grants (DGI)

Your application must be accompanied by:

1. Quotes and/or budget worksheets in support of the total planned budget
2. Your Promotional Plan, internally and importantly, externally.
 - Promoting Rotary and your club
 - Promoting the Rotary Foundation

District Grants

District International Scoping Grants (DGS)

3



- To fund an investigation into the potential for a Global Grant
- Proposed project must align with one of the Seven Areas of Focus
- Outcome will be a fully completed Community Assessment
- Participants must have expertise in the subject disciplines that equips them to make a valid community assessment
- Project Leader must first complete the Grants Management Seminar on My Rotary. Lead club must be the applicant.
- Participation of the local community essential
- Participation of an international partner essential
- Funds travel and accommodation for up to two people
- Permissible to do some project work as part of the grant

District Grants

4

District Year 11-12 Scholarships

Purpose

- To encourage talented and motivated young people facing financial barriers to successfully complete their Year 11 and Year 12 secondary education.
- To build stronger relationships between clubs and their local schools.



District Grants

District Year 11-12 Scholarships

Description

- Up to 10 District Grants of \$1,250 will be available in late 2023 to support clubs that offer scholarships for the 2024-2025 school years
- Each scholarship offered to a school is to be for \$2,500, \$1,500 for Year 11 and \$1,000 for Year 12, made up of a Club contribution of \$1,250 and a matching \$1,250 D9800 Foundation Scholarship Grant.
- The scholarships are to be used for the same student(s) each year.
- Applications for a scholarship are to be made using, *District 9800 Foundation Scholarship Application*
- Clubs will be invited in September 2023 to apply
- Club must claim grant payment at the end of each school year

Grant Supported Projects in 2022-2023

Club	Country	Description (AoF)	Project Total \$A	Block Grant DDF \$A
Bendigo South	Cambodia	Developing Schools Organisation	\$ 3,000.00	\$ 1,000.00
Richmond	Australia	Richmond High School Musical Instrument	\$ 7,000.00	\$ 2,500.00
Keilor East	Cambodia	Toilet Block Hun Sen Angkor Thom HS Siem Reap	\$ 16,500.00	\$ 5,500.00
Werribee	Philippines	Orphanage School Classroom Equipment Project	\$ 15,000.00	\$ 5,000.00
Brighton North	Australia	Bayside Recycle Regatta	\$ 4,306.00	\$ 2,500.00
Balwyn	Cambodia	Battambang Market Stalls	\$ 25,400.00	\$ 6,000.00
Essendon	Australia	Sunscreen for the Homeless	\$ 3,000.00	\$ 1,500.00
Carlton	Afghanistan	Education for Afghan Women and Girls via an Online Portal	\$ 10,000.00	\$ 5,000.00
Hawthorn	Cambodia	Hospital supplies for Kampong Speu Hospital	\$ 7,075.00	\$ 2,358.00
Brighton North	Cambodia	Cambodian Village Toilet Renovation	\$ 18,018.00	\$ 6,000.00
Bendigo	Australia	Well-being Project for Flood Affected Rochester Vic	\$ 12,600.00	\$ 6,000.00
Wyndham Harbour	Australia	Birthing Kits for Third World Countries	\$ 2,000.00	\$ 1,000.00
District 9800	Timor Leste	Furniture for East Timor Schools	\$ 9,700.00	\$ 3,900.00
Wyndham Harbour	Australia	Peace Essay Competition for Primary School Children	\$ 2,000.00	\$ 1,000.00
Brighton North	Australia	Big Serve Bayside	\$ 8,000.00	\$ 4,000.00

District Grants – Approval Timetable

District Grants from July 1st, 2023

Grant applications received between July 1st and October 31st 2023

- Reviewed by D9800 Grants Committee at monthly meeting
- Club will receive an acknowledgement that the Committee has accepted the application for inclusion in the 'Block Grant' (Spending Plan).
- Submitted with the Block Grant in November 2023
- Club advised of outcome by end of November 2023 together with Stewardship Requirements.

Club considering

- Don't have all the information for the Rotary year
- Submit a Grant
- If your form is submitted by November 30th, 2023
- You must lodge the grant before it lapses.

by October 31st 2023

in it will go ahead this

lock Grant submission in
ready to apply.

4, or the funding will



DISTRICT 9800 FOUNDATION DISTRICT GRANT INTENTION 2023-2024

CLUB NAME:	
------------	--

District or Global Grant Details

(If expecting to apply for more than one Foundation Grant, please complete a separate form for each prospective grant).

What type of Grant are you planning? Note: One Grant Type Only Please	District Local Community	District International	District Scoping
	Please tick		
Likely TOTAL PROJECT BUDGET			\$
Brief description of the intended project:			
Do you expect additional D9800 clubs to contribute? How many?			
Expected Project Start Date:	/ /	Expected Completion Date:	/ /
Primary Project Contact:	Name:		
	Club role:		

N.B. Rotary Clubs must be qualified to access Foundation Grants. This means that one or more representatives from your club will have attended a 2023 Grants Seminar in June or July 2023. Clubs must also be current in the payment of dues to Rotary International and Rotary District 9800 and have no outstanding interim or final reports on District or Global grants.

District Grants – Approval Timetable

District Grants from July 1st, 2023

Grant applications received after November 1st 2023

- Reviewed by D9800 Grants Committee at monthly meeting
- If accepted by the Grants Committee, they will be submitted to The Rotary Foundation for approval if 'contingency' funds are still available
- If contingency funds are not available, they will be held back for submission with the Block Grant in November 2024

Applications for Grants

Grant Governance – The District Humanitarian Grants Committee

- District Foundation Grants Chair
- District Foundation Chair
- District Foundation Stewardship Chair
 - District Governor
 - District Governor Elect
 - District Governor Nominee
 - District Governor Nominee Elect

**Supervised by The
Rotary Foundation
in Evanston IL**

Meet on the last Thursday of every month to consider grant applications

Promotion a Key Project Deliverable

SHINE a LIGHT on ROTARY

Rotary



Where to Get More Information?

The District 9800 Website

The screenshot shows the Rotary District 9800 website. At the top, there is a search bar and user information for Richard Blakeman. The main navigation bar includes links for Home, District, Staying Connected, Projects in Action, Members, Foundation, Programs, and More. The Foundation link is highlighted with a red arrow pointing to it from the word 'Foundation' on the right. Below the navigation bar, the 'Overview' section is visible, with a sidebar on the left containing links to various programs and grants. The 'Foundation Grants' link is highlighted with a red arrow pointing to it from the text 'District and Global Grants' on the left. The main content area features a section for the District Director Foundation, including a photo of Grant Hocking and a list of the Foundation Committee members.

Search Richard Blakeman Member Area Logout

Rotary District 9800 IMAGINE ROTARY

Home District Staying Connected Projects in Action Members Foundation Programs More

Overview

D9800 Foundation Programs

- Overview
- Goals
- Causes
- EndPolioNow
- Polio Plus
- Polio Plus Society
- Education Programs
- Scholarships
- Vocational
- Foundation Grants
- District and Global Grants
- Foundation Resources
- D9800 Foundation Newsletters
- D9800 Foundation Presentations
- Paul Harris Fellow Recognition
- Introduction
- Foundation Giving

District Director Foundation

Grant Hocking
Rotary Club of Woodend
[Click to Email](#)

The mission of The Rotary Foundation (TRF) is to enable Rotarians to advance world understanding, goodwill and peace by improving health, providing quality education, improving the environment, and alleviating poverty. TRF is Rotary's Charity and should have the support of all clubs and Rotarians.

Foundation Committee

Chair	PDG Grant Hocking
Deputy Chair	PDG Murray Verso
Communications / Administration Coordination	Jane Pennington
Humanitarian Grants - District and Global	Richard Blakeman
Foundation Stewardship	Thelma Hutchison
Annual Giving Program	PDG Dennis Shore
Every Rotarian Every Year (EREY) - Centurion Club	Amrit Singh
Endowment Fund Programs	PDG Ian Knight OAM
Paul Harris Society and Major Donors	PDG Julie Mason AM
Paul Harris Society Deputy Chair	Peter Shephard
PolioPlus Program	Catherine O'Connor

Foundation

District and Global Grants

District Grants - Summary

The Objectives of District Grants are to:

- Assist clubs with great project ideas to fund those projects
- Facilitate Rotarians at Work
- Encourage club collaboration
- Provide a robust governance structure within which funds are managed
- Help Rotarians to Do Good in the World

District Grants - Summary

The Four Types of District Grant in D9800

1. District Grants Local within Australia (DGL)
2. District International Grants (DGI)
3. District International Scoping Grants (DGS)
4. District Year 11-12 Scholarship Grants

District Grants - Summary

To be successful, grant applications must:

1. Do good in the world
2. Be submitted in accordance with the District Grants Guide
3. Feature **Active** Rotarian Engagement

This could be either, or all, the following: the initiation, design and planning, dedicated fundraising, governance or implementation of the project

4. Deliver **Sustainable** solutions

For Rotary, sustainability means providing long-term solutions to community needs that the beneficiaries of the project can maintain after grant funding ends

5. Rotarians must control the funds
6. Include a strong public relations plan

District Grants - Summary



CAUTION

Grant Projects Once Approved Cannot be Materially Changed

1. If circumstances change and a change to the design of a project becomes desirable, check first with the Grants Committee via the Chairman
2. Grant funding, once approved, cannot be changed.

Your project may become ineligible for the payment of the grant if you make unapproved material changes to the design!

Why do some Grant applications bounce?

1. Didn't read the D9800 Guidelines to District Grants
2. Insufficient active Rotarian engagement
 - Donations to projects of partner organisations do not qualify for a grant
 - Confusion between a project partner and a project supplier
3. Vague application
4. Lack of a plan for Sustainability
5. Lack of supporting documentation – quotes
6. Insufficient publicity plan

The
Rotary
Foundation



**CREATE HOPE
in the WORLD**

Stewardship

Of Grant Funds from The Rotary Foundation

Richard Blakeman

District Rotary Foundation
Grants Chair (DRFGC)



District Rotary Foundation Stewardship Chair (DRFSC)



Thelma Hutchison FCPA

Past President and Current Treasurer
Rotary Club of Glenferrie

eMail: Foundation.Stewardship@Rotary9800.org

What is Stewardship?

Stewardship is the responsible management and oversight of grant funds. It ensures that funds are used properly and benefit the populations in need.

Stewardship involves:

- Report tracking
- Routine monitoring
- Ensuring guidelines followed
- Document retention
- Maintain TRF Seminar attendees' lists
- Ensuring Qualification of Clubs & Districts
- Maintaining trust

**On completion of your project,
complete and return the
District Grant Report Form to
D9800 Foundation Grants Stewardship
via email:**

Final reports must be submitted within one month of the scheduled completion date of your project



District Grant Report Form 2023 – 2024

In your report, describe:

- **The project**
 - what was done and how it was done
- **Rotarian engagement**
 - how many Rotarians, what they did
- **The benefit delivered to the recipients**
 - How many benefited and how
 - The long-term benefits of the project to the beneficiary community
- **Sustainability**
 - how will it be maintained without ongoing Rotary commitment
- **The involvement of other partners**
 - what they did, how it contributed
- **Publicity**
 - what has been delivered internally and externally

And Funding:

- **Where the money came from.**
- **How it was spent**

Instructions:

- Provide receipts or invoices for the full amount of the project (not just the amount of the Grant). Must be provided in electronic form. A Statement of Account can be provided for small cash amounts of \$100 or less
- Provide evidence of payment *if not evident on the receipt or invoice* including completed bank transfers to the beneficiary or partner organisation.
- Receipts are to be scanned and/or attached as a pdf document
- Annotate receipts and/or invoices with the appropriate reference number.
- Be specific, you can add lines to the table below as needed or attach a separate spreadsheet.

Ref	Expense Description (add rows as needed)	Amount (\$AUS)
1.		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15	SUNDRY EXPENSES: (For expenses under \$100 without receipts. List and certify items on the Sundry Expenses Log form provided).	
Total Project Expenditure		

Comment on any significant variation to project budget. Including the reasons this occurred and if the Budget (as per the Grant application) was exceeded how has any extra costs been funded

--



Double Click on the Table to Enter Data

[illegible]

- * This total must agree with the "Sundry Expenses" item in Section B (b) of the District Grant Final Report form.

CERTIFICATION AND CLAIM

I confirm that the expenses claimed above were incurred directly in the provision of goods and services as described in the original grant application, and that all the information contained herein is true and accurate.

Project Primary Contact: (Name)	
Project Primary Contact: Signature	
Date:	

District Grant Report Form 2023 – 2024

Include with your report:

- **All receipts (not invoices)**
 - Addressed to the Rotary Club
 - Describing what was provided
 - Overseas projects funds may be dispersed by the overseas partner
 - Receipts must be provided **together with an additional receipt from the partner** for the reimbursement of funds
- **Examples of internal and external publicity**
 - Describing the project and the role of Rotary and the Rotary Foundation
 - Include logos where possible – **brand** the project
 - **“This project was (is being) delivered with the assistance of a grant from The Rotary Foundation”**
- **Signed declaration by the project lead**

Grant Payments

Grant Governance – The District Foundation Stewardship Committee

- District Foundation Stewardship Chair
- District Foundation Grants Chair
- District Foundation Chair

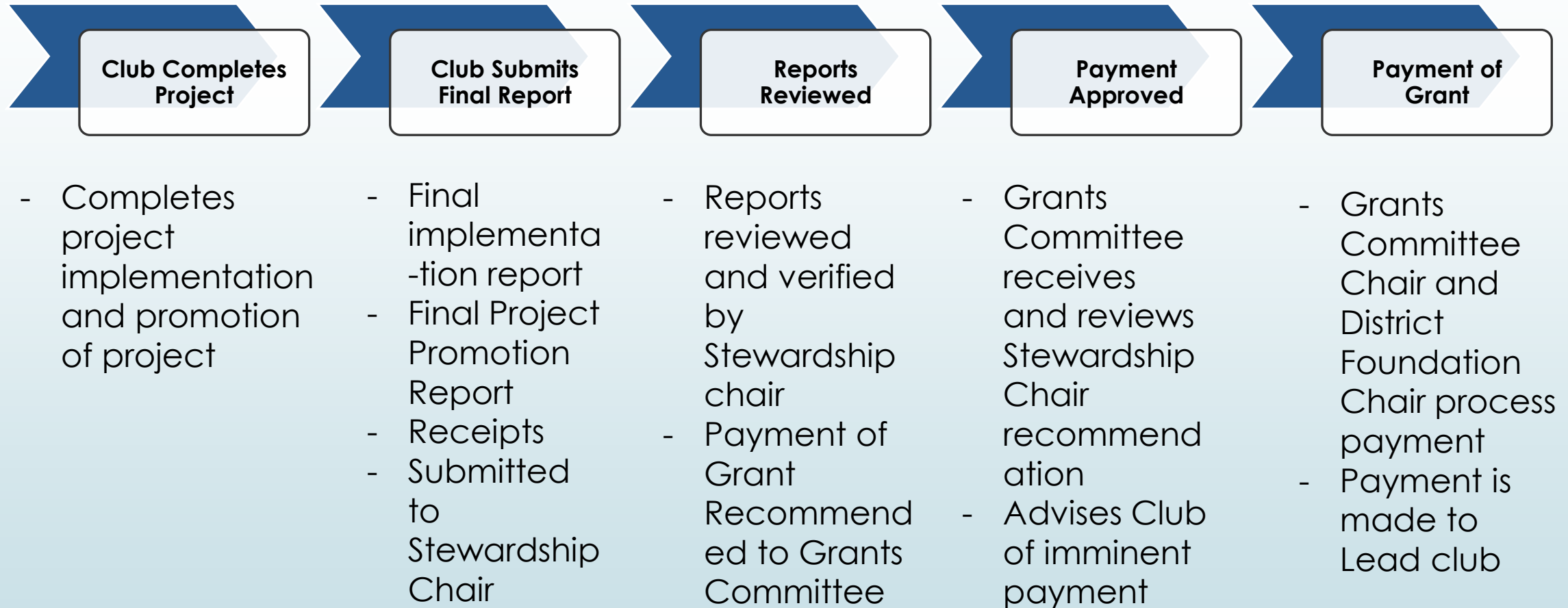
Review reports for compliance and approve grant payment within a few days of their submission

The files of the D9800 Humanitarian Grants Committee are audited annually to ensure compliance with the terms and conditions of The Rotary Foundation



District Grants – The Grant Payment Process

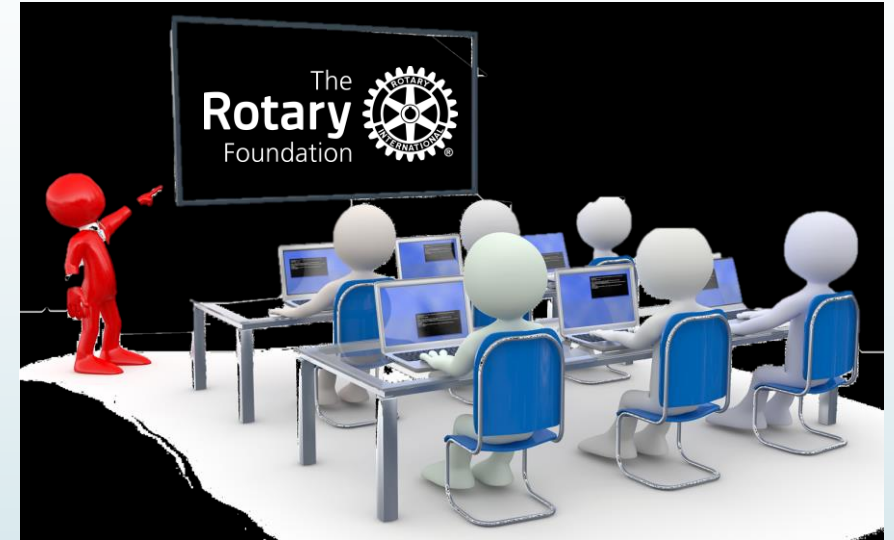
- The



Projects must be completed within 24 months of the date grant is approved

What we have covered

- Why consider a grant?
- Club and project eligibility
- Types of District Grants
- Policies, terms & conditions
- How to apply
- Stewardship
- Where to get more information



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Q&A

