

The
Rotary
Foundation



District 9800

The Rotary Foundation

Grants Seminar

2024

Grant Hocking

District Rotary Foundation
Chair (DRFC)

Thelma Hutchison

District Rotary
Foundation Stewardship
Chair (DRFSC)

Richard Blakeman

District Rotary Foundation
Grants Chair (DRFGC)



ROTARY'S VISION 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

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.**



“Doing Good in the World”

The Value of the Rotary Foundation

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



What does it offer?

- Me
- My Rotary club
- My Rotary District
- The World

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



4
star charity - Charity
Navigator's highest level

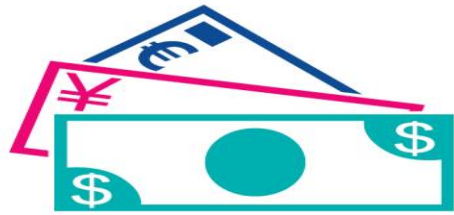


91%
of funds are spent on
program awards and operations

The
Rotary
Foundation



The Rotary Foundation



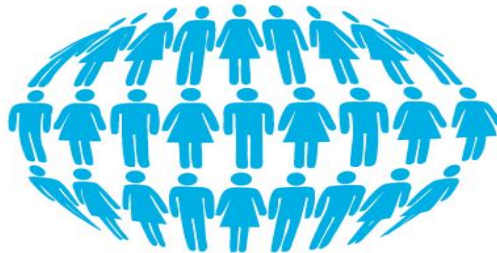
Donation to
Annual Fund
SHARE

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)

THE ROTARY FOUNDATION



Humanitarian Aid

THE ROTARY FOUNDATION



Education Programs

D9800 allocation of TRF funds 23-24

AREA	AMOUNT
POLIO PLUS FUND	\$40,000
PEACE CENTRES	\$25,000
GLOBAL SCHOLARS (PLUS +++)	\$35,000
7 GLOBAL GRANTS	\$50,000
15 DISTRICT GRANTS	\$72,000
17 YEAR 11-12 SCHOLARSHIPS	\$21,250

District Grant allocation totals approximately **\$93,500** and equates to a **total project value of over \$252,000**.

In addition, there have been 4 Royce and Jean Abbey Vocational scholarships allocated.

A Foundation Grant?

1. Your projects / Our projects
2. A robust project governance structure and financial management
3. Leverage club funding
4. Projects are based on a community need
5. Strengthen Rotarian Engagement & Commitment
6. Projects are sustainable
7. Building the ROTARY brand
8. Project learnings that are transferable to other Clubs/Districts
9. Encourage collaboration
10. Greater skills bank
11. Grow your Rotary network
12. Increased trust and confidence in Rotary- Trusted brand

A Foundation Donation

Individual and Club donations ensure Rotary can support its many wonderful programs and projects.

Donate to The Rotary Foundation;

- Directly via *My Rotary*.
- EFT bank transfers to RISPPPO

Details are on the D9800 website

<https://rotarydistrict9800.org.au/sitepage/foundation/personal-and-club-giving>

- Club numbers are on the same webpage.
- Personal ID numbers are also available on the district website under membership.

Australian tax receipts are issued to the nominated donor.

Give where the need is greatest.



ANNUAL FUND	POLIO PLUS
GLOBAL GRANTS	ENDOWMENT FUND



The Rotary Foundation

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**.

Think Foundation First

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

What makes a successful Global Grant?



Applications are accepted throughout the year



Let the District Grants committee know what you are planning.

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

- **RI Cadre of Technical advisors**
- **Experienced D9800 Rotarians and clubs**
- **Resources and Tools**

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>



LEARNING PLAN **2h 45m**

Grant Management Seminar

ENROLLED

How are Global Grants funded:

- ❖ **Minimum project budget = \$30,000**
- ❖ **World Fund provides a maximum award of US\$400,000 (No minimum)**
- ❖ **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.**
 - **Funds can also come via cash, directed giving and endowed funds**
- ❖ **RI matches at 80% of DDF contribution.**
- ❖ **District 9800 as a guideline the common contribution to Global Grants is up to US \$10k depending on size of project and funds available**
- ❖ **Discretion can be applied by the District Foundation committee.**

The
Rotary
Foundation



THE MAGIC
OF ROTARY

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



You will be
your club's
Subject
Matter Expert!

Where to Get More Information?

The District 9800 Website

The screenshot shows the District 9800 website interface. At the top, there is a search bar and user information for Richard Blakeman, with links for Member Area and Logout. Below this is a header with the Rotary logo and 'THE MAGIC OF ROTARY' logo. A navigation menu includes: District, Volunteering with Rotary, Projects in Action, Members, Foundation, Programs, and More. The main content area is titled 'Overview' and features a sidebar with a list of links: 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, and Introduction. The 'District and Global Grants' link is highlighted with a red arrow. The main content includes a section for the District Foundation Director, PDG Grant Hocking, with his photo and contact information. Below this is a section for the Foundation Committee, which includes a table listing committee members and their roles.

Foundation Committee	
Chair	PDG Grant Hocking
Deputy Chair	PDG Julie Mason
Communications / Administration Coordination	Jane Pennington OAM
Humanitarian Grants - District and Global	Richard Blakeman
Foundation Stewardship	Thelma Hutchison
Annual Giving Program	PDG Philip Archer
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	DGE Peter Shephard
PolioPlus Program	Jane Pennington OAM

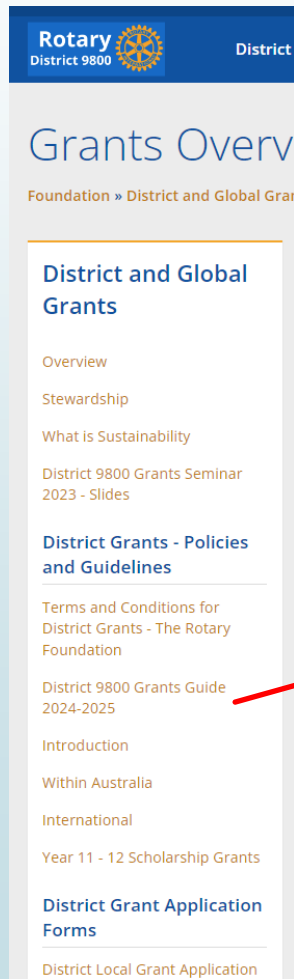
Foundation

District and Global Grants



Where to Get More Information?

The District 9800 Website



The Rotary Foundation
Rotary District 9800

A GUIDE TO DISTRICT GRANTS 2024-25

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 2025 (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 for District or Global Grants
3. Have had at least one club member attend a District Grants Seminar in July 2024



Why Bother with A Foundation Grant?

1. Leverage club funding – Increase project impact
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

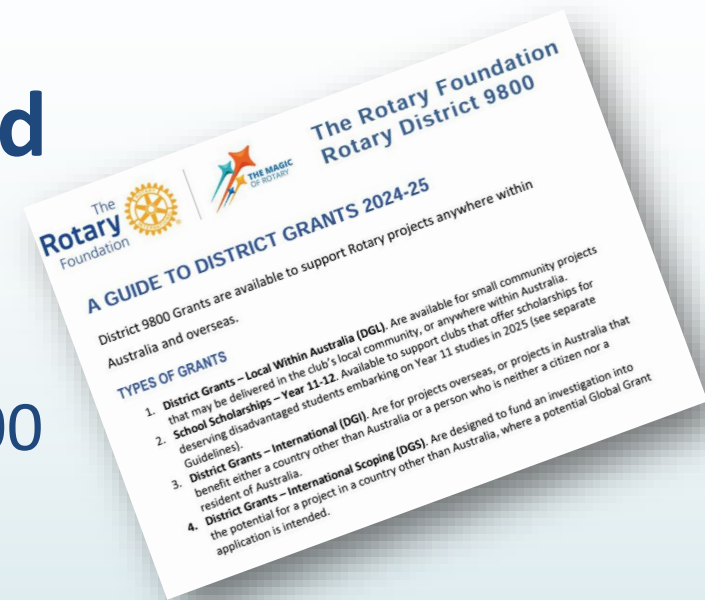
- For smaller, relatively short term Rotary projects
- Local With Australia or International
- Easy application process
- Clubs must be qualified



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 Grant A\$1,000
- 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
- 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.”
- Projects are required to actively engage Rotarians (grants are not available to support donations)
- Must be for a discrete project with a defined completion date. Programs must be sustainable without ongoing Rotary Foundation funding.



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
- Rotarian, Rotary club or Rotary entity may not be the beneficiary of a grant.
- 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
- Priority is given to grant applications or Grant Intention Forms received by September 30th and included in the 'Block Grant' application
- Grant applications received after September 30th and not included in the Block Grant can be funded only if funds are available.
- Grants are paid after final report received



District Grants

1

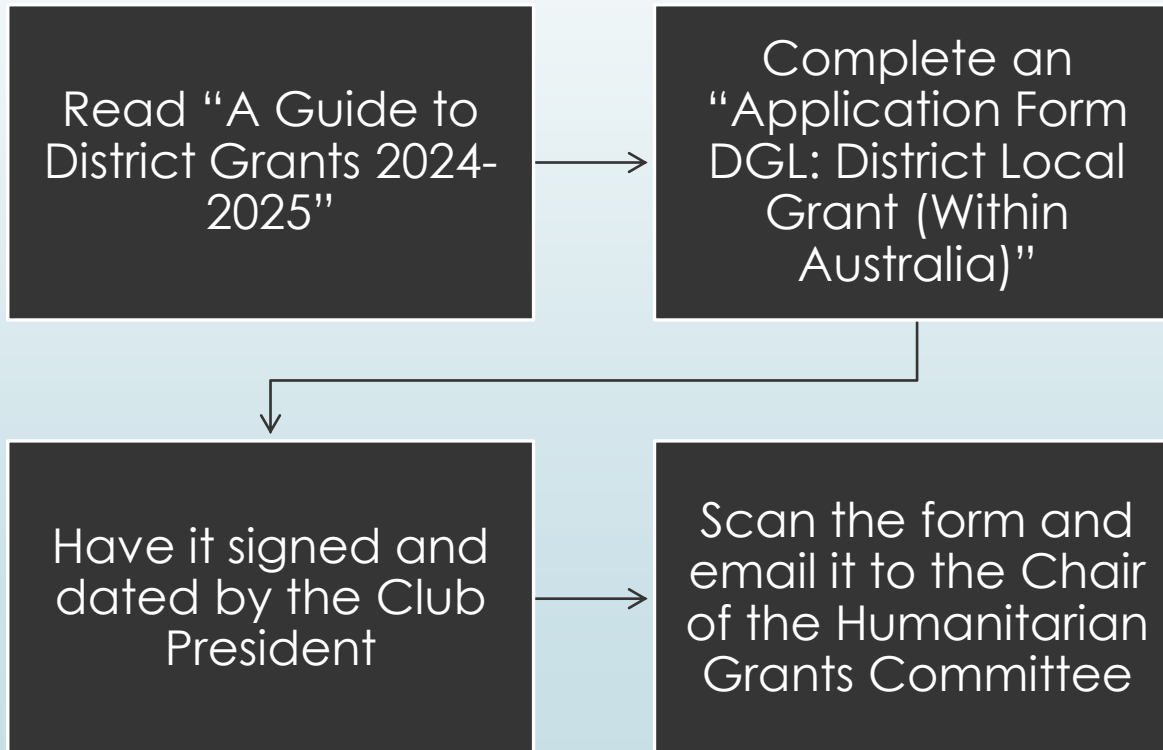
District Grants Local Within Australia (DGL)


- For small community projects delivered anywhere within Australia
- Active Rotarian engagement is essential.
- 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
- Grant funding is offered to match D9800 club funding on a \$1:\$1 basis. Limit \$3,000 single club, \$12,000 multi-club



District Grants

District Grants Local Within Australia (DGL) How to Apply



The Rotary Foundation  **APPLICATION FORM**
DGL: DISTRICT LOCAL GRANT (Within Australia) Rotary District 9800

Please complete all sections of this application. Attach additional pages as needed.
Incomplete applications will be returned.

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 District9800 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) **Briefly describe the project**
(describe the project, its objectives and how they will be implemented)

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, your club and The Rotary Foundation
 - Promotion by Program Partners is especially valued
 - TRF acknowledgement: “This project was/is being delivered with the assistance of a District Grant from The Rotary Foundation”.
 - Posters to include The Rotary Foundation logo.
 - Fixed assets must bear a plaque acknowledging the contribution of Rotary and The Rotary Foundation



District Grants

2


District International Grants (DGI)

- For discrete projects where there will not be a Global Grant application
- Australian citizens may not be a beneficiary
- Require an international partner – Overseas Rotary District or Club preferred
- Overseas projects 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) and quotes and budget worksheets
- Grant funding is offered to match D9800 club funding on a \$1:\$2 basis. Grant limit A\$8,000.



District Grants

District International Grants (DGI)

 **APPLICATION FORM** Rotary District 9800

DGI: DISTRICT INTERNATIONAL GRANT

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

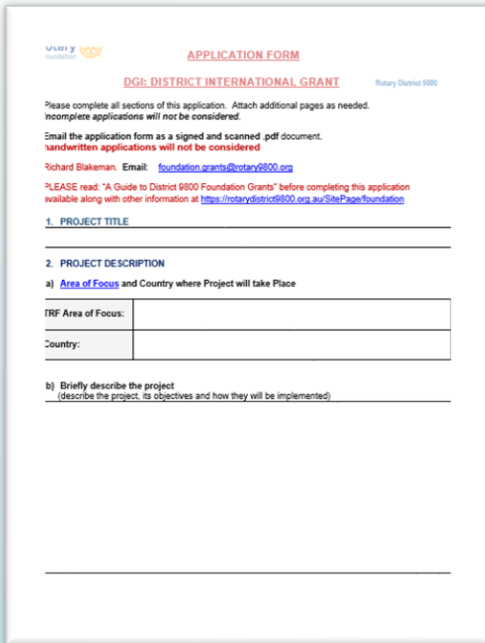
- All parties affirm that this Grant is initiated, controlled, and managed by the Rotary Club(s) and /or District(s) involved in the project
- The Rotary Club(s) affirm that the Cooperating Organisation (if applicable) is reputable and responsible and acts within all governing laws or the project country

Page 1 of 2



District Grants

District International Grants (DGI) How to Apply



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/Website/Foundation>

1. PROJECT TITLE

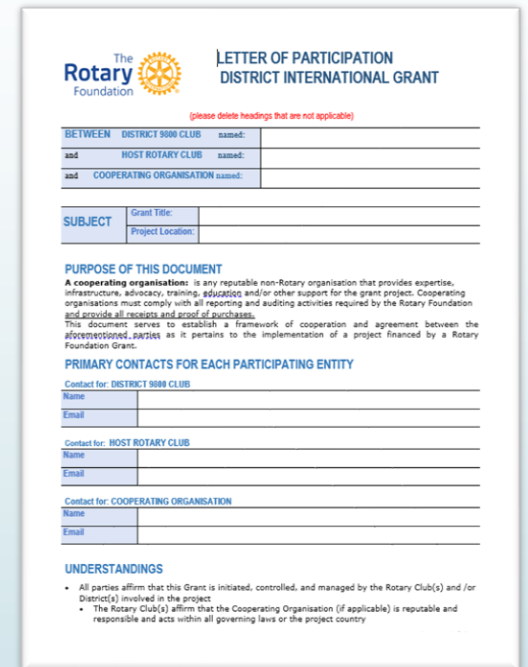
2. PROJECT DESCRIPTION

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)

1. Read 'A Guide to District Grants 2024-2025'
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



The Rotary Foundation **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, advocacy 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. The International Letter of Participation (LOP)
2. Quotes and/or budget worksheets in support of the total planned budget
3. Your Promotional Plan, internally and importantly, externally.
 - Promoting Rotary and your club
 - Promoting the Rotary Foundation. “This project was/is being delivered with the assistance of a District Grant from 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 2024 to support clubs that offer scholarships for the 2025-2026 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) both years.
- Applications for a scholarship are to be made using, *District 9800 Foundation Scholarship Application*
- Clubs will be invited to apply in September 2024
- Club must claim grant payment at the end of each school year



District Grants

4

Youth Service

District Grants are available to match club contribution in support of:

- RYLA
- Sponsorship of MUNA teams
- Rotary Youth Exchange
- Rotaract Programs



Grant Supported Projects in 2023-2024

Club	Country	Description (AoF)	Project Total A\$	Block Grant DDF A\$
Essendon	Kenya	Ruben Clinic Equipment - Kenya	21,000	7,000
Caroline Springs	Timor Leste	Scoping Visit- Timor Leste	5,500	2,750
Essendon	Australia	Sensory Room for children and adults	2,860	1,430
Central Melbourne	Australia	Silk Miller Scholarship	11,600	3,000
Brighton	Australia	Public access defibrillator at Brighton Beach	5,470	2,735
Flemington Kensington	Australia	Mental Health First Aid - Horn of Africa Community	6,000	3,000
Flemington Kensington	Somalia	Medical Equipment-Jarriiban University Hospital Somalia	23,500	5,500
Brighton North	Australia	Mental Health First Aid for Year 9 students	12,000	6,000
Malvern	Australia	Workshop with the National Youth Choir of Australia	4,900	2,500
Melbourne Passport	Cambodia	Cambodia 4 Schools WASH	25,000	8,000
Keilor East	Cambodia	Water Filtration and Rubbish Incineration	25,000	8,000
Essendon	Australia	Thermals and Jackets for Melbourne's homeless	3,000	1,500
Brighton North	Cambodia	Thmor Chul School Education and Sanitation Project	24,600	8,000
Werribee	Philippines	WASH Project Ibona Elementary School	14,327	4,776
Glenferrie	Sierra Leone	Toilet Blocks for the Aladura Primary School	25,000	8,000
17 Clubs	Australia	Year 11-12 Scholarships	42,500	21,250



District Grants – Approval Timetable

Grant applications received between July 1st and September 30th 2024

- Reviewed by D9800 Grants Committee at monthly meeting
- Will be funded from the 2023-2024 Block Grant while funds last.
- Otherwise, club will receive an acknowledgement that the Committee has accepted the application for inclusion in the 'Block Grant' (Spending Plan) for 2024-2025.
- Submitted with the Block Grant in November 2024
- Club advised of outcome by end of November 2024 together with Stewardship Requirements.



District Grants – Approval Timetable

Club considering a grant but not ready to apply by September 30th 2024

- Don't have all the ducks in a row but are pretty certain it will go ahead this Rotary year
- Submit a Grant Intention Form by September 30th 2024
- If your form is convincing, it will be included in the Block Grant submission in November to 'reserve' funds for you when you are ready to apply.
- You must lodge a formal application by June 30th 2025, or the funding will lapse.

The image shows a screenshot of the 'DISTRICT 9800 FOUNDATION DISTRICT GRANT INTENTION 2024-2025' form. The form includes the Rotary Foundation and 'THE MAGIC OF ROTARY' logos. It contains a 'CLUB NAME' field, a note about applying for multiple grants, a table for selecting grant types (Local Community, International, Scoping), a 'Likely TOTAL PROJECT BUDGET' field, a 'Description of the intended project' section with sub-questions, a 'Do you have a greater than 50% confidence level that this project will proceed before June 2025?' checkbox, 'Expected Project Start Date' and 'Expected Completion Date' fields, and a 'Primary Project Contact' section with 'Name' and 'Club role' fields. A small disclaimer at the bottom states that Rotary Clubs must be qualified to access Foundation Grants as of July 2024.

What type of Grant are you planning? <small>Please tick</small>	District Local Community	District International	District Scoping
<small>Note: One Grant Type Only Please</small>			
Likely TOTAL PROJECT BUDGET	\$		
Description of the intended project: - What will be delivered? - How will it be delivered? - Name likely project partners (if any)			
Do you have a greater than 50% confidence level that this project will proceed before June 2025?			
Expected Project Start Date:	/ /	Expected Completion Date:	/ /
Primary Project Contact:	Name:		
	Club role:		

District Grants – Approval Timetable

Grant applications received after November 1st 2024

- 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 2025



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 first Monday 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 District 9800 website interface. At the top, there is a search bar and user information for Richard Blakeman, with links for Member Area and Logout. The main header features the Rotary logo and the text 'Rotary District 9800' alongside 'THE MAGIC OF ROTARY'. Below this is a navigation menu with items: District, Volunteering with Rotary, Projects in Action, Members, Foundation, Programs, and More. The main content area is titled 'Overview' and includes a sidebar with links to various sections: 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, and Introduction. The 'District and Global Grants' link is highlighted with a red arrow. The main content area also features a 'District Foundation Director' section with a photo of PDG Grant Hocking, his contact information, and a paragraph about the mission of The Rotary Foundation (TRF). Below this is a 'Foundation Committee' table listing various roles and the names of the committee members.

Foundation Committee	
Chair	PDG Grant Hocking
Deputy Chair	PDG Julie Mason
Communications / Administration Coordination	Jane Pennington OAM
Humanitarian Grants - District and Global	Richard Blakeman
Foundation Stewardship	Thelma Hutchison
Annual Giving Program	PDG Philip Archer
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	DGE Peter Shephard
PolioPlus Program	Jane Pennington OAM

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
- Support Rotarians at Work –fund Rotary projects
- Encourage club collaboration
- Provide a robust governance structure within which donated 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 publicity 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



Stewardship

Of Grant Funds from The Rotary Foundation

Thelma Hutchison

District Rotary Foundation
Stewardship Chair (DRFSC)



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



District Grant Report Form 2024 – 2025

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

foundation.stewardship@rotary9800.org

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



The Rotary Foundation
ROTARY INTERNATIONAL
DISTRICT 9800

District Grant Final Report 2024-2025

Complete and Return this form to D9800 Foundation Grants Stewardship Chair via email to – foundation.stewardship@rotary9800.org

For further information firstly refer District Foundation website <https://rotarydistrict9800.org.au/sitepage/foundation>

& then if you still have questions contact Grant Stewardship Chair foundation.stewardship@rotary9800.org

Your complete District Grant report must be submitted within one month of the completion of your project.

GRANTS ARE PAID AFTER THE FINAL REPORT AND RECEIPTS ARE RECEIVED

Payment of District Grants are authorised after the final District Grant report together with all required receipts and information, and evidence of the delivery of the promotional plan, is delivered to and accepted by the Humanitarian Grants Committee.

Plus FOR DISTRICT INTERNATIONAL SCOPING GRANTS a completed Community Assessment form is required on the prescribed form [available here](#)

District Grant No.	DGL/I/S:	Rotary Club:	
Project Title			

A. Project Description (What, When, Where & Who)

1. Briefly describe the project. i.e. What was done, when and where project activities took place, and who were the beneficiaries?

Also, detail any changes from what was detailed in your Grant Application form.

Final Report Form: D9800 Rotary Foundation District Grants 2024-2025 Page 1 of 6



District Grant Report Form 2024 – 2025

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 Foundation support?
- **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**



District Grant Report Form 2024 – 2025

b) Application of funds/Project Expenditure

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



Sundry Expenses Log | PROJECT: DG XXXXXX

Double Click on the Table to Enter Data

Date spent	Description of Expenditure Item	Name of Supplier	Name of Purchaser	Expense Claim \$
TOTAL				\$

• *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 2024 – 2025

Include with your report:

- **All receipts (or invoices if accompanied by bank transfer as proof of payment)**
 - Addressed to the Rotary Club
 - Describing what was provided
 - Overseas projects funds may be dispersed by the overseas partner
 - Receipts (or invoices with proof of payment) 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
 - Links to social media and website posts are acceptable.
 - 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

Club Completes Project

- Completes project implementation and promotion of project

Club Submits Final Report

- Final implementation report
- Final Project Promotion Report
- Receipts
- Submitted to Stewardship Chair

Reports Reviewed

- Reports reviewed and verified by Stewardship chair
- Payment of Grant Recommended to Grants Committee

Payment Approved

- Grants Committee receives and reviews Stewardship Chair recommendation
- Advises Club of imminent payment

Payment of Grant

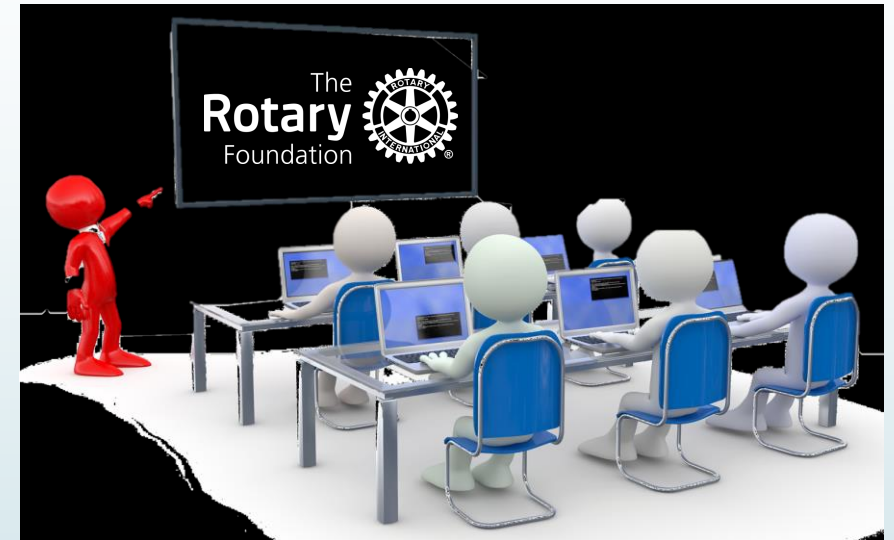
- Grants Committee Chair and District Foundation Chair process payment
- Payment is made to Lead club

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



Grant Intention Form

➤ Lodge by September 30th 2024

➤ For grants to be included in the 2024-2025 Block Grant



DISTRICT 9800 FOUNDATION DISTRICT GRANT INTENTION 2024-2025

CLUB NAME:	
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(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		\$
Description of the intended project: - What will be delivered? - How will it be delivered? - Name likely project partners (if any)			
Do you have a greater than 50% confidence level that this project will proceed before June 2025?			
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 2024 Grants Seminar in July 2024. 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 Grant Workshop

- Late August 2024
- Via Zoom
- How to lodge a successful District Grant Application
- How to successfully acquit a District Grant without drama

