Grants Management Seminar – Session 2

Global Grants

Introduction

WHAT IS A GLOBAL GRANT PROJECT?

- PARTNERSHIP BETWEEN A HOST AND INTERNATIONAL ROTARY CLUB
- MINIMUM OF $30,000. AVERAGE IS ABOUT $56,000.
- WITHIN 7 AREAS OF FOCUS
- SUSTAINABLE
- HAS A START AND A FINISH.
- TRAINING TRAINING TRAINING

Grant Summary 2024

2023-24 Grant Summary

485
district grants

106
disaster response grants

1,287
global grants

1
programs of scale grants

$30m
program awards

$4m
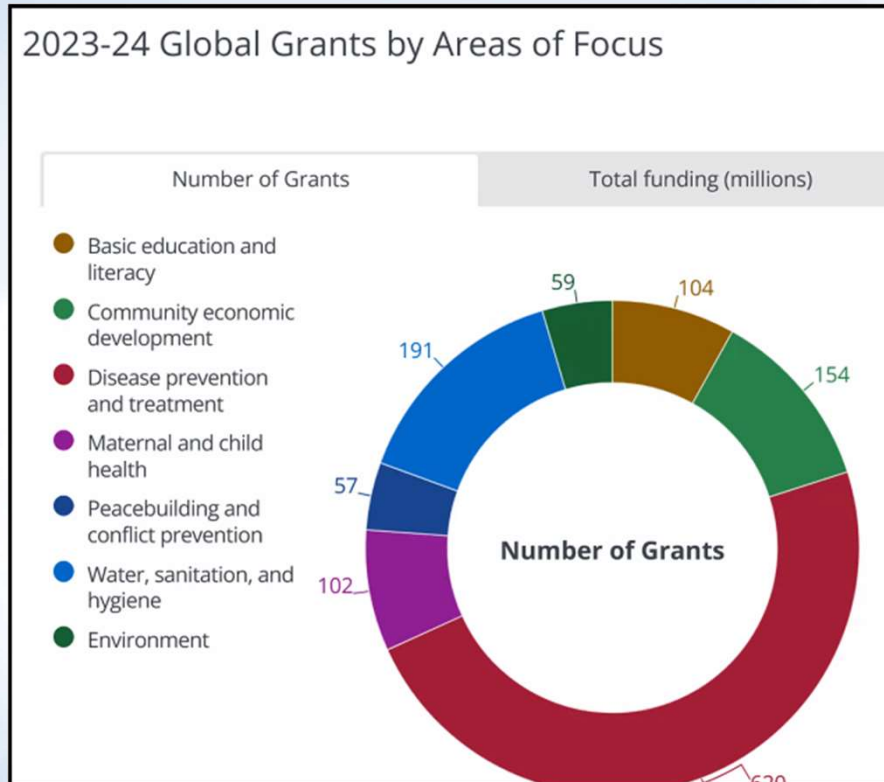program awards

$72m
program awards

$2m
program awards

District 5495 The Rotary Foundation

SEVEN AREAS OF FOCUS

- Peacebuilding and conflict prevention
- Disease prevention and treatment
- Water, sanitation, and hygiene
- Maternal and child health
- Basic education and literacy
- Community economic development
- Environment

ROTARY'S AREAS OF FOCUS
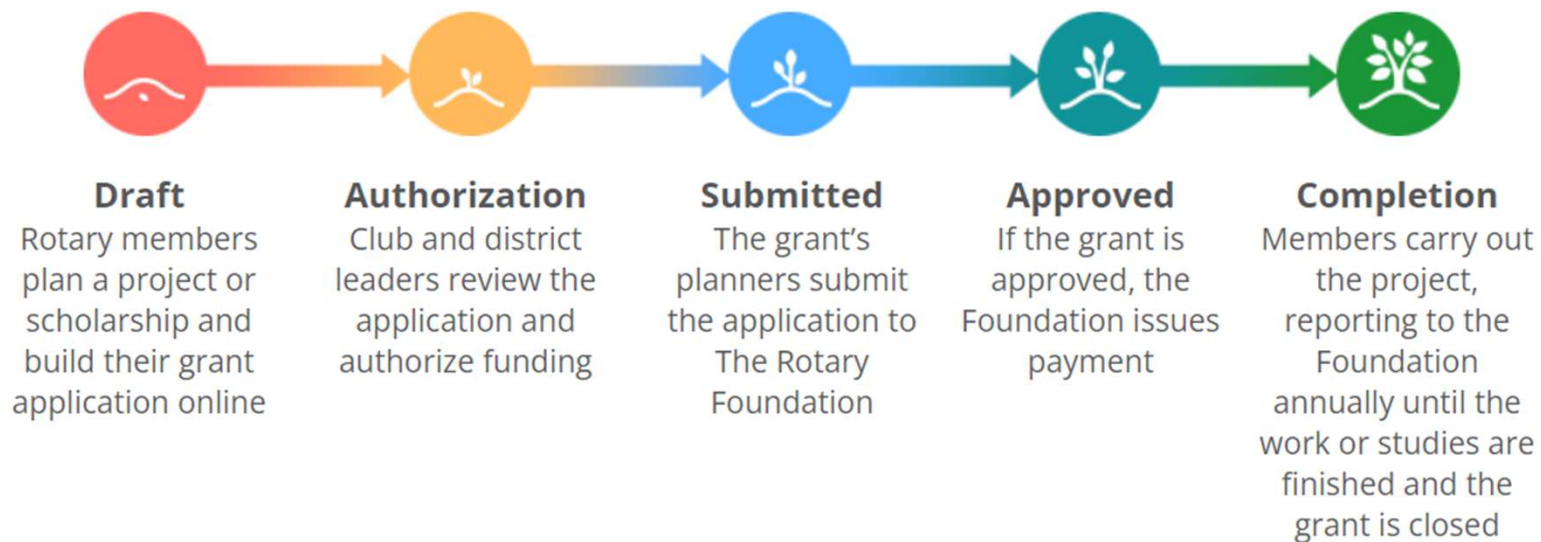
Funding by Area of Focus

2023-24 Global Grants by Areas of Focus

Number of Grants	Total funding (millions)

- Basic education and literacy
- Community economic development
- Disease prevention and treatment
- Maternal and child health
- Peacebuilding and conflict prevention
- Water, sanitation, and hygiene
- Environment

59
104
191
154
57
102
620

Number of Grants

The Process for Global Grants

The lifecycle of a Rotary grant

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

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

DEFINING THE PROJECT

- **COMMUNITY ASSESSMENT !!!!!!**
- **LISTEN TO THE COMMUNITY**
- **START EARLY WITH THE APPLICATION**
- **ASK FOR HELP**
- **LOCAL RESOURCES**
- **CADRE**

Community Needs Assessment
(NOT AN OPTION)

1

Choose a project that is based on the community's need

2

Assess resources of the community, your clubs and potential partners (local NGOs, Government agencies)

3

Talk to multiple levels of stakeholders in the community

4

Review and complete the Community Needs Assessment form (found on the District and Rotary International web sites.

Resource:
Community Assessment Tools *manual*

Tips for conducting a
community
assessment

Recommended
stakeholders

Methodologies

COMMUNITY
ASSESSMENT
TOOLS
A resource for Rotary projects

Rotary

TAKE ACTION: www.rotary.org

Project Planning

- Form a three-person grant committee from both Host and International Clubs
- Assign roles – get people with different skills
- Implementation plan (controls budget)
- Budget plan
- Contingency plan
- Document retention plan

Creating a Budget

- Promote strong partnerships between host and international grant sponsors

- Remind Rotarians and community members to set appropriate project objectives by first conducting a community assessment

- Encourage Rotarians to look for opportunities to partner with organizations or other Rotary clubs that are already working toward similar goals

- Recommend that Rotarians purchase equipment and technology from local sources whenever possible, to foster sustainability and contribute to the local economy

- Encourage Rotarians to explore the possibility of partnering with a cooperating organization that has demonstrated success in the relevant area of focus or project site

$$$$ SHOW ME THE MONEY $$$$$

- ONE PAGER PITCH
- PARTNERSHIPS – LOCAL, NGOS,
- OTHER ROTARY CLUBS
- INDIVIDUALS
- DDF MATCHING 80%

GLOBAL GRANT FINANCING EXAMPLE
2022-2023 Model

SOURCE OF FUNDS	AMOUNT	DISTRICT MATCH (0%)	TRF MATCH (80% of DDF only)	TOTAL
Clubs / Individual Contributions	$12,000			$12,000
District Contributions (DDF)	$10,000		$8,000	$18,000
TOTAL				$30,000

Cash Guidelines

Cash contributions come from clubs and/or individual Rotarians

Funds cannot be raised from beneficiaries in exchange for a grant.

Funds cannot come from other grants.

Contributions credited to donor with IRD Donation Letter (Club foundation, District).

Request for DDF

Clubs must submit a *Request for DDF Form*

DDF is allocation and is limited based on available funds.

DDF depends on availability of fund, <u>your clubs qualification</u>, scope of project, District Grant Committee and District Governor approval.

District 5495 The Rotary Foundation

Conflicts of Interest

Rotary wants both of the Clubs to disclose conflicts of interest

But the TRF understands the reality of the 3rd world.

In many 3rd world programs the Rotarians are also local business leaders – disclosure is not the same as prohibited.

3 bid for pricing is best practice but not practical in a remote village – just explain why your pricing is favorable – less transport costs, creates jobs and capacity building.

Summary of Successful Global Grant Projects

- Meet real community needs identified by community **assessment**

- Need careful **planning**

- Must be **sustainable** for global projects

- Requires proper **stewardship** of funds

- Have measurable **outcomes**

Part 2.2
Okay Now You are Ready to
Apply for a Global Grant

The Process for Global Grants

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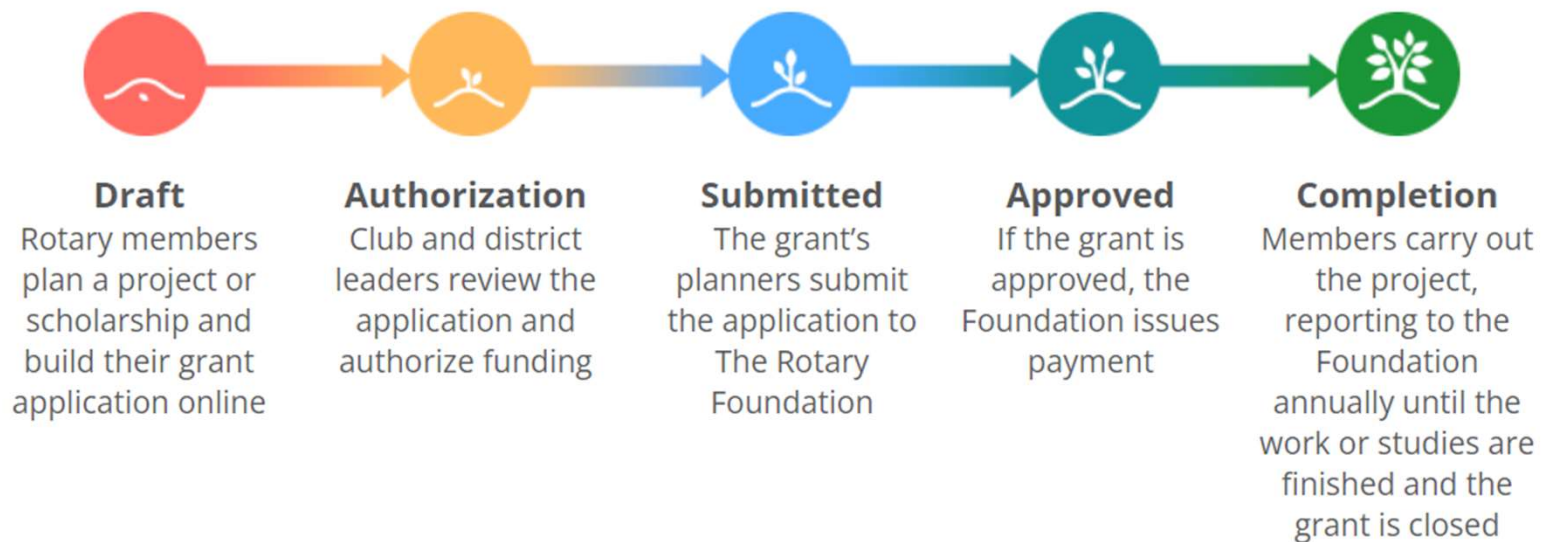
TO BE APPROVED

- Is sustainable — include plans for long-term success after the global grant funds have been spent
- Includes measurable goals
- Aligns with one of Rotary's areas of focus
- Responds to real community needs — any club or district that applies for a global grant to support a humanitarian project or a vocational training team must conduct a community assessment first and design the project based on what they learn through that assessment.
- Actively involves Rotary and community members
- Meets the eligibility requirements in the grants terms and conditions

First Page of MyRotary Global Grant

Next Steps

Step 2: Committee Members

Step 3: Project Overview

Step 4: Areas of Focus

Step 5: Measuring Success

Step 6: Location and Dates

Step 7: Participants

Step 8: Budget

Step 9: Funding

Step 10: Sustainability

Supporting Documents ✔

Finalize & Submit

Step 11: Review and Lock

Step 12: Authorizations

Submit for approval to TRF

Approval can take 6 months to a year – don't promise fast $$$

Keep 'contributing' clubs informed of approval progress. Get written confirmation of their funds signed by President and President Elect (might take a year)

TRF may ask for clarifications or modifications

Upon approval, clubs listed for cash will receive TRF communication to send funds, but project sponsors are ultimately responsible for clubs to honor pledged contributions

Financial Management Plan
as required in M.O.U.

- Separate bank account for Global Grant funds (if allowed)

- Controls on Distribution of funds – 2 signatures

- Use checks/bank cards to track funds. Copy cash transaction receipts with cell phone.

- Detailed ledger (sent with reports)

- Include local laws

Record Keeping: Document Retention

KEEP THESE DOCUMENTS FOR YOUR RECORDS:

☐ All grant correspondence, including email

☐ Beneficiary documentation, including:
  - The community assessment
  - Any cooperating organization memoranda of understanding
  - Any additional agreements with beneficiary institutions or groups or implementing partners such as local municipalities or government agencies

☐ Vendor documentation, including:
  - Quotes
  - Contracts

☐ Grant-related documentation, including:
  - Scholar and vocational training agreements
  - Receipts and invoices
  - Bank statements and other financial documentation
  - Inventory
  - Photos

Global Grant Reports
to TRF

Progress reports

➤ 12 months following approval

➤ Every 12 months through the life of the grant

Final report within 2 months of completion

If there are questions, TRF can do an audit. Save files for five years.
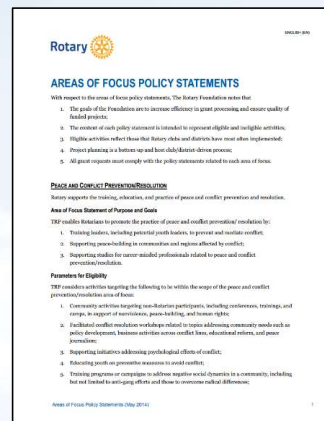
Global Grant Report Content

- How partners were involved

- Activity to date

- Evaluation of project goals

- How area of focus goals were met

- How funds were spent

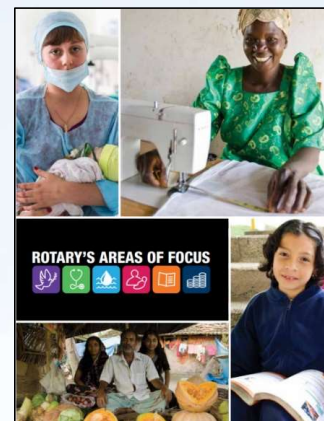- Number of beneficiaries and how they benefited
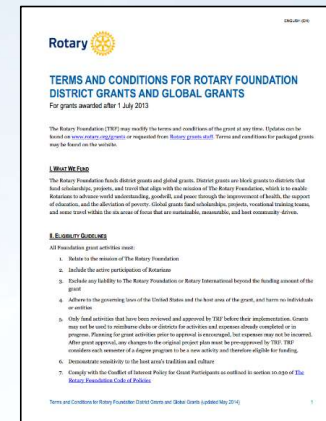
Global Grant Resources

A Guide to Global Grants

Areas of Focus Policy Statements

Rotary's Areas of Focus

Terms and Conditions for Rotary Foundation District Grants and Global Grants

District 5495 The Rotary Foundation

D5495 Grant Page
Online at www.Rotary5495.org

Global Grants Document Download

Useful Links

Rotary Grants Center

Rotary Global Grants Page

Club Qualification Documents

Club Financial Management Plan Template

Club Qualification Requirements 2021-22

D5495 Memorandum of Understanding (MOU)

About Global Grants

Guide to Global Grants

Terms and Conditions

Areas of Focus Policy Statements

Community Assessment Tools

Community Assessment Form

Global Grants Calculator

How to Use the Rotary Grants Center

Disaster Response Grants Terms and Conditions

District 5495 Website

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Global Grants Chair

Grantologist

TRF Cadre Member