ROTARY GRANTS

Abby McNear
Rotary Grants Manager/Program Officer
ROTARY GRANTS

• Global grants
• District grants
Global grants
GLOBAL GRANTS

- Large, long-term projects
- Sustainable, measurable outcomes
- Alignment with areas of focus
- International partnership
- $30,000 minimum budget
- World Fund match
AREAS OF FOCUS

• Peace and conflict prevention/resolution
• Disease prevention and treatment
• Water and sanitation
• Maternal and child health
• Basic education and literacy
• Economic and community development
Sustainability means different things to different organizations.

For Rotary, sustainability means providing long-term solutions to community needs that the beneficiaries can maintain after grant funding ends.
Humanitarian projects
Scholarships
Vocational Training Teams
District grants
DISTRICT GRANTS

- Small-scale, short-term
- Local or international activities
- Aligned with the Foundation’s mission
- Single grant awarded annually
Seu Soninho, cadê você?
### GLOBAL GRANT VS. DISTRICT GRANT

<table>
<thead>
<tr>
<th></th>
<th>Global grant</th>
<th>District grant</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cost</strong></td>
<td>$30,000 min.</td>
<td>No max. or min.</td>
</tr>
<tr>
<td><strong>Funding</strong></td>
<td>World Fund, DDF, cash</td>
<td>DDF</td>
</tr>
<tr>
<td><strong>Application</strong></td>
<td>Online</td>
<td>Managed by district</td>
</tr>
<tr>
<td><strong>Area of focus</strong></td>
<td>Project aligns with area(s) of focus</td>
<td>No area of focus requirement</td>
</tr>
<tr>
<td><strong>Partnership</strong></td>
<td>Host and international partnership</td>
<td>No partnership required</td>
</tr>
<tr>
<td><strong>Sustainability</strong></td>
<td>Required</td>
<td>Not required</td>
</tr>
<tr>
<td><strong>Measurability</strong></td>
<td>Required</td>
<td>Not required</td>
</tr>
<tr>
<td><strong>Scholarships</strong></td>
<td>Graduate and post-graduate</td>
<td>No study level requirement</td>
</tr>
</tbody>
</table>

*Table showing the comparison between Global and District grants.*
DISTRICT QUALIFICATION

- District leaders complete qualification process online annually
- Agree to implement MOU
- Conduct grant management seminars for clubs

THE ROTARY FOUNDATION

DISTRICT QUALIFICATION MEMORANDUM OF UNDERSTANDING

1. District Qualification
   To participate in district, global, and packaged grants, a district shall complete an online qualification process, agreeing to implement the financial and stewardship requirements in this memorandum of understanding (MOU). By successfully completing these requirements, a district becomes qualified, and eligible to participate in Rotary Foundation (TRF) grants.

   A. A district is responsible for the use of funds for district-sponsored grants, regardless of who controls the funds.
   B. A district is responsible for a club-sponsored grant if the sponsoring club has been terminated or is otherwise unable to take responsibility for the grant.
   C. To maintain qualified status, a district must comply with this MOU and all applicable TRF policies.
   D. Qualification may be suspended or revoked for any of the following:
      1. Misuse or mismanagement of grant funds, or failure to appropriately address allegations involving, but not limited to, fraud, forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain, undisclosed conflicts of interest; misappropriation of grant funds by individuals; report falsification; overpressing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes.
      2. Refusal to qualify member clubs without sufficient cause.
   E. A district must cooperate with any financial, grant, or operational audits.

2. District Officer Responsibilities
   The district governor, district governor-elect, and district Rotary Foundation committee chair shall hold primary responsibility for club and district qualification, in addition to overseeing the proper implementation of TRF grants.

   District officer responsibilities include:
   1. Implementing, managing, and maintaining the district and club qualification process
   2. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices.
   3. Abiding by, following, enforcing, disseminating, and educating Rotarians on the terms and conditions for district, global, and packaged grants.

District Memorandum of Understanding (June 2015)
CLUB QUALIFICATION

- Agree to implement the club MOU
- Send club member to grant management seminar sponsored by the district
- Complete any other district requirements
Grant Management Seminars
WHAT IS A GRANT MANAGEMENT SEMINAR?

- Helps clubs understand grants
- Teaches clubs how to develop effective, sustainable projects
- Opportunity to inspire grant committee members and other Rotarians
GRANT MANAGEMENT SEMINAR

- In-person conference or online course/webinar series
- Takes place any time of year
- Stand-alone meeting or in conjunction with another meeting
DISTRICT LEADER INVOLVEMENT

• Governor-elect
• Governor
• Training committee
• Rotary Foundation committee chair
• Grants and stewardship subcommittee chairs
• International service committee chair
PARTICIPANTS

- Clubs must send at least one member
- Recommend the following attend:
  - Secretary
  - Treasurer
  - Rotary Foundation committee chair
  - Members who are planning potential global grant projects
  - President
- Complete seminar before year of service begins
MATERIALS

• Participants should review materials before event
  – Guide to Global Grants
  – Club qualification MOU
  – Terms and conditions
  – Building a Global Grant course in the Learning Center
**SESSIONS**

- **General sessions**
  - Topics relevant to a large audience
  - Details on breakout sessions
  - Discussion of district business
  - Multimedia presentations
- **Breakout sessions**
  - Learn more detailed information
  - Ask questions
  - Engage in discussion
  - Participate in activities

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**GRANT MANAGEMENT SEMINAR LEADER’S GUIDE**

**Contents**

- Introduction
- General Session: Qualification
- Breakout Session Options
  - Session 1: Make a Sustainable Impact
  - Session 2: Partner to Maximize Your Impact
  - Session 3: Plan Your Global Grant Funded Project
  - Session 4: Apply for a Global Grant
  - Session 5: Implement, Monitor, and Evaluate Your Project
  - Session 6: Report Your Progress and Outcomes
- Grant Management Seminar PowerPoint Template
- Sample Evaluation Form
- Webinar Series Recommendations
- Developing an Online Course
Community Assessments
WHAT IS A COMMUNITY ASSESSMENT?

• Examines strengths, weaknesses, needs, assets
• Helps to identify relevant opportunities for projects
BENEFITS

• Increased understanding of community dynamics
• Helps you make decisions about service priorities
• Builds valuable relationships
• Encourages community member participation
• Helps to build trust, community ownership and sustainability
ASSESSMENT TOOLS

- Community meeting
- Survey
- Interview
- Focus group
- Asset inventory
- Community mapping
TIPS

• Remain open minded
• Choose participants carefully
• Include overlooked or marginalized groups
• Consider yourself an outsider
• Don’t promise a project before you make a decision
U.S.-BOUND SCHOLARS

- Tax withholdings for global grant scholarships awarded for study in the U.S.
- Impacts expenses beyond tuition, books, necessary equipment and fees
- Does not apply to scholars from Japan, Canada and Germany
• 30 June deadline for scholars beginning their studies in August, September or October
• 90 days in advance for everyone else
CONSTRUCTING LOW COST SHELTERS AND SIMPLE SCHOOLS

- Three year pilot began 1 January
- Clubs and districts may use global grants to build low-cost shelters and simple schools
- Construction must be a part of a comprehensive project related to an area of focus
- Guidelines and application appendixes available on My Rotary
• Launched in December 2016
  – New look
  – Streamlined global grant application
• Positive feedback
• Global grant reporting updated in coming months
RESOURCES FOR FINDING PARTNERS

- Rotary Ideas
- Rotary discussion groups
- Rotarian Action Groups
- Intercountry committees
- Project Fairs
- Rotary Fellowships
PROJECT ENHANCEMENT

Assist Rotarians in creating more sustainable, higher-quality global grants by

- Improving project design and implementation
- Strengthening mobilization efforts
- Leveraging local Rotarian expertise in global grants
- Creating and strengthening Rotarian-led coalitions
District International Service Committee Chair duties include:

- Encouraging involvement in international service
- Building or expanding a district resource network
- Promoting resources for international service
- Supporting the efforts of the district Rotary Foundation committee
Statistics
## 2016-17 Grant Statistics

<table>
<thead>
<tr>
<th></th>
<th>Approved</th>
<th>World Fund</th>
<th>Total Funding</th>
</tr>
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<tbody>
<tr>
<td>District grants</td>
<td>494</td>
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<td>$27,084,971</td>
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<td>Global grants</td>
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<th>Global Grant Activity Type</th>
<th>Number of Grants</th>
<th>Area of Focus</th>
<th>Number of Grants</th>
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<td>WAS</td>
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### 2016-17 Grant Statistics – Zone 26

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<th>Approved</th>
<th>World Fund</th>
<th>Total Funding</th>
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<td>District grants</td>
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<td>Global grants</td>
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<th>Number of Grants</th>
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<td></td>
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GLOBAL GRANT APPROVALS – A COMPARISON

Number of Global Grants

Month

July  | August  | September | October | November | December | January | February | March | April | May | June

Year

2013-2014
2014-2015
2015-2016
2016-2017
SHARE SYSTEM

Contributions

Annual Fund

Endowment Fund

PolioPlus Fund

SHARE System

World Fund 50%

DDF 50%

Rotary Grants and Activities: Doing Good in the World
SHARE PROCESS

1:1 Match

World Fund

Global grants

District grants

Donations

Funds raised

2014-15

2015-16

2016-17

2017-18

2018-19

Funds spent

Unspent funds roll forward

DDF
Questions?