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# Welcome!

**ROTARY DISTRICT 5960  
GRANT MANAGEMENT  
SEMINARS – 2019-20**



# **ROTARY DISTRICT 5960**

## **Understanding the Why and How of Grants**

### **GETTING YOUR CLUB QUALIFIED FOR 2019-20 GRANT SUBMITTALS**

# TODAY'S SEMINAR

- **OVERVIEW AND INTRODUCTION**
- **DESIGNING A PROJECT**
- **APPLYING FOR & IMPLEMENTING A GRANT**
- **OVERSIGHT & REPORTING**
- **QUALIFICATION**
- **SCENARIOS & EXAMPLE GRANT**
- **QUESTIONS**



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**This presentation was developed by  
District 5960 to meet the  
requirements of a Grant Management  
Seminar to qualify clubs to both  
submit and support District and Club  
Grants in 2019-20**

**This is not an official publication  
of The Rotary Foundation.**



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# SOME ABBREVIATIONS to KNOW

- **TRF**     **The Rotary Foundation**
- **GMS**     **Grant Management Seminar**
- **MOU**     **Memorandum of Understanding**
- **VTT**     **Vocational Training Team**
- **DDF**     **District Designated Funds**
- **DGSC**     **District Grants Sub-Committee**
- **DRFC**     **District Rotary Foundation Chair**
- **DISC**
  - **District International Service Chair**



# **Rotary's newly articulated “Vision Statement”**

**“Together we see a world where people unite  
and take action to create lasting change  
across the globe, in the community and in  
ourselves.”**

**RI Strategic Priorities**



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# Rotary's Strategic Priorities

- Increase our impact**
- Expand our reach**
- Enhance participant engagement**
- Increase our ability to adapt**



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# The Rotary Foundation

## Why we're here

**District TRF structure – The DGSC is the Start. Mentors are Necessary**

### **Grant processes**

**Global Grants – Concept Approval BEFORE going on line for Application.**

**Community assessments required after July 1, 2019.**

**District Grants – Spending Plan, Quick Reference Guide, Follow District Procedures**

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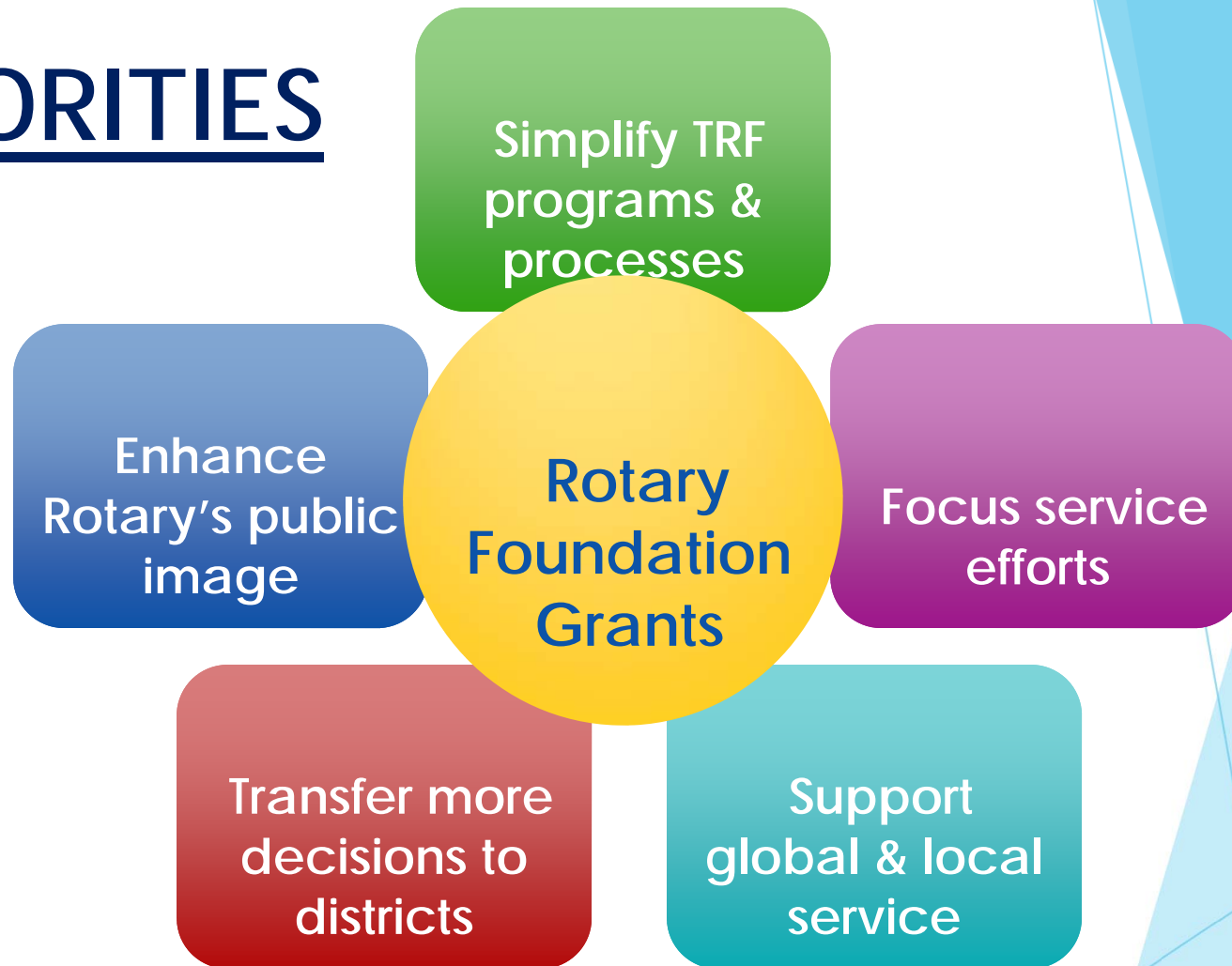


# The Rotary Foundation Grants Process

- **The Rotary Foundation is always a partner.**
- **The Rotary Foundation provides guidelines & support.**
- **All clubs must send a club member to a Grants Management Seminar (GMS) to be eligible for Foundation Grant Funds.**



# PRIORITIES



# The Rotary Foundation Grants Process

## HOW?

Where do the **\$\$\$\$** come from?

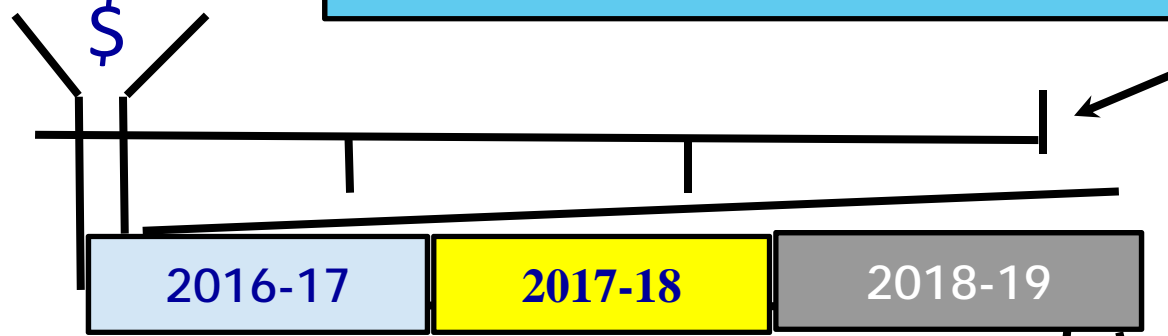
- The Rotary Foundation (TRF)
- (Rotarians) That's US!
- How does it get to us?
- District Designated Funds - DDF



# The Rotary Foundation Funds Collection & Allocation

\$377564

\$



Earnings used for administrative costs

**2019-20**

\$188,782

\$188,782

50% to District Designated Fund

50% to World Fund Matching Grants  
Peace Fellows  
Polio+

\$94,391

\$94,391

Up to ½ to District Grants

At least ½ to Global Grants



**NEW:  
2019-20 and 2020-21**

**Benchmark Date:  
June 30, 2018**

**District 5960 DDF as of that date: \$108,919**

**TRF will allow up to 10% additional funds to  
be used for District Grants**

**2019-20 Up to \$10,384 additional**

**2020-21 Up to \$10,384 additional**



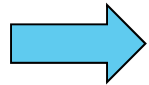
# The Rotary Foundation Documents

- **Memorandum of Understanding (MOU)**
  - **Club Addendum**
- **Quick Reference Guide**
  - **District Grant Form**



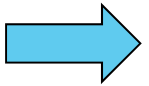
# The Rotary Foundation

## Requirements

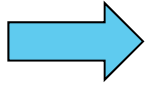


### **District Memorandum Of Understanding (MOU)**

More stewardship responsibility at District level



### **Club MOUs (Must include Addendum!)**



### **Grant Management Seminar (GMS) **TRF Mandate****

**\*\* Minimum of one primary club contact must have attended a GMS**



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# The Rotary Foundation Grants Process

**TWO kinds of grants**

**\$\$\$ GLOBAL GRANTS**  
**(Minimum of \$33,000)**

**\$ DISTRICT GRANTS**  
**(Maximum of \$12,000**  
**match or \$24,000 grant)**





# The Rotary Foundation

## DISTRICT GRANTS

- \*HUMANITARIAN GRANTS FOR LOCAL & INTERNATIONAL SERVICE PROJECTS**
- \*SCHOLARSHIPS (Graduate and Undergraduate)**
- \*VOCATIONAL TRAINING TEAM (prefer to do in a Global Grant)**

**MUST MEET MISSION OF THE FOUNDATION**



# District Grant Project Requirements

- **Maintain Documentation (5 years required)**
- **Establish a “clear” Bank Account (Especially for Global)**
- **Require and Maintain Receipts and proof that the club paid expense.**
- **Process Reports on Time**
  - 1. First one @ 6 months from approval**
  - 2. Then every 6 months until complete**
  - 3. Final report at completion plus 60 days**

# The **Rotary** Foundation District Grants, cont.

## **Funding Criteria**

- **Club per capita giving for past 3 years**
- **Club Participation Last 3 years in other District Grants**
- **# of Club Grants Awarded for past 3 years**
- **Committee evaluation of project**

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# The **Rotary** Foundation District Grants, cont.

## **\*PROJECT PLANNING**

- 1. Grant Lead (Project Manager)**
- 2. Treasurer (Finance and Budget)**
- 3. Public Image (Document project)**

**Always be thinking about what is  
needed for the Final Report**

## **CONTINGENCIES**

**(TRF must approve spending plan)**

# The Rotary Foundation Global Grants Process

## All Done Online (HUMANITARIAN TYPE GRANTS)

- **TRF MATCH** must be at least \$15,000
- **HOST AND INTERNATIONAL PARTNER**  
**Dist. 5960 is International**  
**Location of Grant Project is Host**
- **Mentor Assignment then APPLICATION**
- **AT LEAST ONE AREA OF FOCUS**



# The Rotary Foundation Grants Process

## GLOBAL GRANTS

- **Humanitarian Projects**
  - **VTT inclusion in projects**
  - **Global Fellowships**
- (all in 6 Areas of Focus)**



The Rotary Foundation Global Grants ----  
Must be in

## SIX 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**



# Global Grants

## DISTRICT 5960

### HUMANITARIAN GRANTS

### CLUB(s) PROJECT – AT LEAST \$33,000

<b>Club(s)</b>	<b>\$ 6,000</b>
<b>DDF</b>	<b>12,000</b>
<b>TRF club match</b>	<b>3,000</b>
<b>TRF DDF match</b>	<b><u>12,000</u></b>
<b>PROJECT TOTAL</b>	<b>\$33,000</b>

**\* District 5960 DDF Match is now \$2:\$1 to \$25,000**





# The Grants Process.....

.....possible “**RED**” flags.

1. OFAC (Office of Foreign Assets Control) requirements for **some** foreign countries
2. TRF prohibitions for **some** countries and Districts
3. District restrictions for **some** clubs
4. Specific club limitations



# **Global Grant Requirements**

- 1. Needs Assessment**
- 2. Documentation on how grant will be sustained.**

## **RESOURCES**

**Rotary Foundation Cadre  
DISC**



# Rotary Polio Plus

- **The Gates Foundation is still matching individual and club contributions with a \$2.00 to \$1.00 match and the World Fund is also adding a \$1.00 to \$1.00 match**



# **The Rotary Foundation Going Forward >>>**

- ▶ **Service Above Self**
- ▶ **Doing Good in the World**
- ▶ **PolioPlus, until disease eradicated**
- ▶ **Peace and Global Fellowships**
- ▶ **Need for giving to support TRF**
- ▶ **Giving recognition**

# The Rotary Foundation

## Tools to help you be a success

- 1. Mentors – Experienced in Grants as members of the DGSC. Will be assigned on every Grant, Global or District**
- 2. DISC to help with Global Grants**
- 3 Quick Reference Guide – A handy document which explains all the details necessary to complete a successful grant**

# Foundation Grant Roles

## **District Rotary Foundation Team (Committee)**

### **DRFC (Sets Budget based on DDF)**

- Grants Team- Meets the 3<sup>rd</sup> Friday of the month at District Office**
- Stewardship & Accounting – Treasurer**
- DISC (District International Service (Chair)**
- Annual Financial Assessment is mandatory (by September 30)**
- Clubs & Club Leadership Members (That's you and me!)**

# The Rotary Foundation

- Guide for Grant Management and Stewardship Plans
- Club Qualification (District Qualification also)
- Financial Management Plan
- Document Retention
- Method for Reporting and resolving misuse of Grant Funds

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# Foundation Grants

## CLUB QUALIFICATIONS

- **Grant Management Seminar**
  - 1 person per club **MUST** attend
- **Club must be in good standing**
- **Club Memoranda of Understanding (MOUs–and District Addendum)**

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# The Rotary Foundation

- **The “END GAME”**

- \* **Document Retention ---**

- Get and Keep Receipts**

- \* **Reports**

- **Progress Reports (@ 6 month intervals)**
      - **Final Report (When completed + 60 days)**
      - **Pictures or Video clips with report**
      - **Letters of Commendation (Statements and letters from those who benefitted from the project).**

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# Successful Grant Projects Document !

- **Meet Community Needs Assessment**  
**Global Grants must have a Needs Assessment**
- **Include Frequent Partner Communication**
- **Have an implementation Plan**
- **Demonstrate Sustainability (Global)**
- **Maintain Proper Stewardship**
- **Implement Characteristics of Prior Successes, that's why there are mentors**

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# Grant Site & ALL Information

[www.rotary.org/myrotary](http://www.rotary.org/myrotary)  
(must have personal site entry)

**Grant Management Manual (from site)**

**Terms and Conditions for Rotary  
Foundation District Grants and Global  
Grants**

# The Rotary Foundation Grants Site

[www.rotary.org/myrotary](http://www.rotary.org/myrotary)

- **Global Grant Monitoring and Evaluation Plan Supplement**
- **Sample Cooperating Organization Memorandum of Understanding**

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# THE ROTARY FOUNDATION MISSION

DOING GOOD  
IN  
THE WORLD!



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# The Concluding Steps !!

- **Our final Assignment !!**
  - **Breakout into mentor/attendee teams**
  - **Five Scenarios – Practice what we’ve preached**
  - **One District Grant Proposal**
    - **Use what we’ve presented**
    - **Get familiar with the process**

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