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
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.
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
Rotary’s Strategic Priorities

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

- Enhance Rotary’s public image
- Simplify TRF programs & processes
- Transfer more decisions to districts
- Support global & local service
- Focus service efforts

Rotary Foundation Grants

BE THE INSPIRATION
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

- **2016-17**: $377,564
  - 50% to District Designated Fund
    - $94,391: Up to ½ to District Grants
    - $94,391: At least ½ to Global Grants

- **2017-18**: $188,782
  - 50% to District Designated Fund

- **2018-19**: $188,782
  - Earnings used for administrative costs
  - 50% to World Fund Matching Grants Peace Fellows Polio+

- **2019-20**: $188,782
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**
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
*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

Club(s) $  6,000
DDF 12,000
TRF club match 3,000
TRF DDF match 12,000
PROJECT TOTAL $33,000

*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 3rd 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
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)
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).
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
Grant Site & ALL Information

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

▪ Global Grant Monitoring and Evaluation Plan Supplement

▪ Sample Cooperating Organization Memorandum of Understanding

Rotary
BE THE INSPIRATION
THE ROTARY FOUNDATION MISSION

DOING GOOD IN THE WORLD!

The Rotary Foundation

Rotary International

BE THE INSPIRATION
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