GRANT MANAGEMENT TRAINING

DISTRICT 5150

January 27 and March 17, 2018
<table>
<thead>
<tr>
<th>Rotary International</th>
<th>The Rotary Foundation</th>
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<tbody>
<tr>
<td>Established 1905</td>
<td>Established 1917</td>
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<tr>
<td>501c-4 – Board of Directors</td>
<td>501c-3 – Board of Trustees</td>
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<td>Plus General Secretary</td>
<td>Plus General Secretary</td>
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<tr>
<td>Support Clubs and Charter Clubs</td>
<td>Raise Funds for Programs and Projects</td>
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<td>Promote Membership</td>
<td>Manage Funds</td>
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<td>Collect Dues</td>
<td>Collect Donations</td>
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<tr>
<td>Set Policies, Admin</td>
<td>Set Terms /Conditions for Grants</td>
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OUR MISSION – OUR 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
PURPOSE OF OUR SESSION TODAY

To show YOU how to access Our Rotary Foundation funds to benefit your communities at home and around the world
GRANT MANAGEMENT TRAINING GOALS

- Understand how to manage a Rotary Foundation funded grant
- Learn stewardship expectations
- Prepare Clubs to implement the MOU
- Qualify Clubs to receive grant funds 2018-19
DOING GOOD IN THE WORLD
We Are People of Action
GUIDING DOCUMENTS

TRF Grant Terms and Conditions

Memorandum of Understanding

District Grant Policies

Guide to Global Grants

Where can you find these?
GUIDING PRINCIPLES

- Projects relate to TRF mission
- Active participation of Rotarians
- No spending prior to approval
- Implement the plan just as approved
- Adhere to US and host area Laws
- Proper Stewardship
GUIDING PRINCIPLES

- Sensitivity to host area
- Proper use of Rotary Marks
- Include Signage - Use new Voice and Visual Guidelines

Improvement Project

Rotary Club of Chico and The Rotary Foundation
WHAT GRANTS CANNOT FUND

- Continuous or excessive support of any one beneficiary
- Purchase of land or buildings
- Project signage >$500
- Public Relations initiatives
- Contribution to another TRF grant
WHAT GRANTS CANNOT FUND

- Unrestricted cash donations to a beneficiary or cooperating organization
- Activities for which the expense has already been incurred
- Fundraising Activities
- Operating expenses of another organization
Ensures that projects

- Have proper financial controls
- Adhere to technical standards
- Meet the needs of participants
- Fulfill objectives
- Safeguard funds
Stewardship is the responsible management and oversight of grant funds, including:

- **Rotarian supervision**
- Oversight of funds
- Financial records review
- Reporting any irregularities
- Timely submission of reports
RECAP

Which are characteristics of ALL Foundation-Funded Grants? Select all that are true.

A. Includes Active Rotarian participation
B. Aligns with The Rotary Foundation mission
C. Allows unrestricted cash donations to a beneficiary organization
D. No spending prior to approval
E. Rotarians must manage project and project funds

A. T
B. T
C. F
D. F
E. T
FUNDING BASICS
50% of Donations to Annual Fund come back to District Each Year

3 Year Cycle

50% District Designated Funds (DDF)

50% World Fund

- District Grants
- Global Grants
- Donations to Polio, Peace Centers
- Global Grants
- Peace Centers
- Polio+
Fair Share DDF Allocation Calculation

prior 3 years
Club AF Donations ÷ Total AF Donations = %

X Available District DDF

= Club Fair Share DDF
DISTRICT 5150 FAIR SHARE FUNDING

Fair Share DDF Allocation
Hypothetical

\[
\begin{align*}
\text{2016-2018 Club AF Donations} & \quad $56,296 \\
\text{2016-2018 D5150 AF Donations} & \quad $1,050,000 \\
= & \quad 5.362\% \\
\times & \quad $160,000 \text{ Available DDF} \\
= & \quad $8,578.44 \text{ Club Fair Share DDF}
\end{align*}
\]
QUALIFICATION
The Governor, Governor Elect, and District Foundation Chair must complete an online process to review, answer questions and agree to the District MOU.

The District must ensure that Grant Management Training is available to all clubs.

Clubs must be Qualified to receive grant funds.*
THE MEMORANDUM OF UNDERSTANDING
Agreement between the club and district and acknowledges that the club will undertake the proper implementation of grant activities and proper management of Foundation grant funds.

An Important Legal Document
MEMORANDUM OF UNDERSTANDING

- **Club Officer Responsibilities**
  - Implement, manage, and maintain club qualification
  - Ensure proper stewardship
  - Ensure no actual or perceived conflict of interest
MEMORANDUM OF UNDERSTANDING

• Financial Management
  ▪ Standard set of accounts with detailed ledger
  ▪ Disburse grant funds as appropriate
  ▪ Use checks or credit cards
  ▪ Maintain segregation of duties
  ▪ Establish an inventory system
MEMORANDUM OF UNDERSTANDING

• **Bank Account Requirements**
  - Separate account*
  - Account name should identify grant
  - Have 2 Rotarians signatories
  - Be low- or non-interest bearing
  - Plan for transfer of custody if signatories change
MEMORANDUM OF UNDERSTANDING

• Report on Use of Grant Funds
  ▪ Complete
  ▪ Accurate
  ▪ On Time
MEMORANDUM OF UNDERSTANDING

• Document Retention
  ▪ Provide access to documents for transparency
  ▪ Retain for a minimum of five years or longer if local law requires
  ▪ Make copies
  ▪ What to keep?
MEMORANDUM OF UNDERSTANDING

- Reporting Misuse of Grant Funds
  The club must report any potential and real misuse or mismanagement of grant funds to the District’s Stewardship Chair:
  William Gilmore   wg-arch@outlook.com
This is the Club’s responsibility.

For Global Grants, both Sponsor Clubs are responsible regardless of which Club has received the funds.
MOU AND ADDENDUM

- **Authorization and Agreement**
  - Clubs must be qualified for both District and Global Grant participation
  - 2018-19 Club President and President Elect sign*
  - 2018-19 Club President and one other have attended GMT
  - Be a Club in “Good Standing”
Clubs must be qualified by April 1, 2018 in order to receive DDF for either a District or Global Grant in 2018-19
MEMORANDUM OF UNDERSTANDING

- Read the MOU carefully
- Share with your Board
- Sign it with a clear mind and heart
- Apply for and implement district and global grants
- Make the world a better place
The MOU is a serious document with specific club and officer responsibilities.
The MOU holds Rotarians to the highest ethical standards.
The MOU requires organization and transparency.
The best way to get your PE to sign is to cover up the writing and tell him/her you just want an autograph.
TYPES OF GRANTS
- District grants
- Global grants
- Packaged Scholarships
VTTS and SCHOLARS

• Vocational Training Teams
  ▪ District
  ▪ Global

• Scholars
  ▪ District
  ▪ Global
DISTRICT GRANTS – WHAT ARE THEY?

- Managed by District
- Local or International projects
- Shorter term, smaller-scale projects
- Humanitarian Service, Vocational Training Teams (VTTs), Scholarships
- Aligned with TRF mission
- Within Areas of Focus encouraged
DISTRICT SCHOLARSHIPS

- Any level, length of time, location or area of study
- May be used for youth programs
- May be used for VTTs
- No Rotarians or lineal descendants of Rotarians; No employees of Rotary Clubs, Districts, RI or organizations that partner with TRF
DISTRICT VOCATIONAL TRAINING TEAMS

- Activities support mission of TRF
- May be Rotarians or non-Rotarians
- No age restrictions
GLOBAL GRANTS – WHAT ARE THEY?

- International – partners in 2 countries
- Larger, long-term projects
- Minimum budget $30,000
- Support specified Area of Focus Goals
- Responsive to real needs
- Sustainable
- Measurable Outcomes
- Humanitarian- VTTs- Scholars
NEW GLOBAL GRANTS

Low Cost Shelters
Simple Schools

CONSTRUCTING LOW COST SHELTERS
GLOBAL GRANTS
Guidelines and Application Appendix

LOW COST SHELTERS GUIDELINES

Section 1: Program Requirements

1. Low cost shelters are to be built as part of a comprehensive project that fits within one of six areas of focus, with sustainable elements and training in the chosen area of focus. This will ensure the alleviation of poverty and prevent the deterioration of shelters and communities into a state of disrepair.

2. Projects need to include training in financial management and supplemental livelihood to maintain their homes after receipt.

3. All projects must include adequate sanitation. Ideally, projects will include toilets, sinks, and potable water on each property. In these instances, residents must also receive training to provide collective maintenance.
GLOBAL SCHOLARSHIPS

- Graduate Level Studies
- Area of Focus
- Must study abroad
- International and Host Sponsors
- May be 1-4 years
- No Rotarians or lineal descendants etc.

GLOBAL GRANT SCHOLARSHIPS SUPPLEMENT

The Rotary Foundation funds scholarships with global grants and district grants. This supplement focuses on global grant scholarships. For information about district grant scholarships, clubs should contact their district Rotary Foundation committee, and districts should refer to Lead Your District: Rotary Foundation Committee and District Grants Scholarship Best Practices.

OVERVIEW

Through global grants, Rotarians can support future leaders in fields related to the 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 grant scholarships fund graduate-level coursework or research for one to four academic years. A key feature of global grants is the partnership between the district or club in the study location (host sponsor) and the district or club in the scholar’s home country (international sponsor). Both sponsors must be qualified before they can submit an application.

FINDING AND INTERVIEWING ELIGIBLE CANDIDATES

Global grant scholars plan to pursue a career in an area of focus, and their graduate-level educational goals should support this career interest. Pursuing a career in an area of focus means the scholar has a long-term commitment to measurable, sustainable change. Be sure that a candidate’s previous work or volunteer experience, academic program, and career plans are strongly aligned with one of the areas of focus.
GLOBAL VOCATIONAL TRAINING TEAMS

- Must align with one of more Areas of Focus
- Rotarian leader with expertise, knowledge of Rotary
- At least two members with at least two years professional experience within Area of Focus
- Length of visit determined by sponsors
DISTRICT OR GLOBAL GRANT?
MAKING A SUSTAINABLE IMPACT
Giving a community the skills and knowledge to maintain project outcomes for the long term, after grant funds have been expended.
INVEST IN PEOPLE

MAKE A SUSTAINABLE IMPACT

Start with the community

Encourage local ownership

Provide training

Buy local

Find local funding

Measure your success
What Makes This Project Sustainable?
AREAS OF FOCUS

- Promoting Peace
- Fighting Disease
- Providing Clean Water
- Saving Mothers and Children
- Supporting Education
- Growing Local Economies
AREAS OF FOCUS – Global Grants

- Review Areas of Focus Policy
- Design project based on Area of Focus
- Ensure project relates to goals of chosen Area(s) of Focus
NEEDS ASSESSMENT

- Base project on community’s needs
- Assess resources of your Club and potential partners
- Talk to the community
- Maximize Public Image opportunities
GLOBAL GRANTS COMMUNITY ASSESSMENT RESULTS

Use this form to report community assessment findings to The Rotary Foundation when you apply for a global grant.

Assessing the strengths, weaknesses, needs, and assets of the community you plan to help is an essential first step in designing an effective and sustainable global grant project. See Community Assessment Tools for full instructions and helpful tips.

This form will help you report the results of your community assessment, and it’s required when you apply for any humanitarian or vocational training team grant. Complete a separate form for each beneficiary community (e.g., school, health care system, or village), using information that is both current and specific to each community. Remember, you can’t use global grant funds to cover the cost of doing an assessment, but you can use district grant funds.

Beneficiary community or institution

Groups in the community that would receive a clear, direct, and immediate benefit from the project

Beneficiaries’ demographic information, if relevant to the project

Who conducted the assessment? (check all that apply)
- Host sponsor members
- International sponsor members
- A cooperating organization
WHAT SHOULD THE CLUB DO FIRST

Following the recent earthquakes in Nepal, a Rotary club in California establishes contact with a Rotary club in Kathmandu, Nepal.

The U.S. club could immediately donate as much as $10,000 toward relief efforts and rebuilding, but it wants to maximize its impact by involving other U.S. clubs and accessing the matching funds available through a Global Grant.

What should the club do first?
PARTNER TO MAXIMIZE IMPACT
PROJECTS AND PARTNERS

- RI Convention
- Project fairs
- Other Clubs / Districts
- Rotary Showcase/Rotary Ideas
- Rotary events – VTTs – Scholars - RYE
- Facebook
- International travel
- www.matchinggrants.org
Toronto, the capital of nice

A tour of Rotary's 2018 convention city reveals one common thread: a welcoming...
PROJECTS AND PARTNERS – Rotary Ideas

Motorcycle library for underdeveloped village

Mandalamakar, one of underdeveloped village in Tasikmalaya, West Java Indonesia, has four elementary schools and all of them didn’t have a school library or public library. To serve the community needs, providing mobile library such as motorcycle library is the best solution.

Mammography system for ABA and environs by R.C. Eziukwu ABA

Cancer is one of the world’s deadliest diseases today. A good number of Aba residents die annually from the scourge, specifically breast cancer. Most of the deaths recorded are due to lack of early detection. This project will help.

Mount Holly Community Garden Center

The Mount Holly Rotary Club is partnering with the Mount Holy Community Garden to build a butterfly garden, educational workshop area, and pergola.
ROLE OF PARTNERS – Global Grant

SPONSOR ROLES

Host and international sponsors have different responsibilities. However, the roles of each sponsor also depend on the clubs involved, the community’s strengths, and the nature of the project. As in all good relationships, communication is the key.

**Host sponsor**
- Initiates the project
- Conducts a community assessment
- Manages project implementation and budget
- Provides local assistance and support to vocational training teams and scholars during their time abroad
- Receives project funds

**International sponsor**
- Provides financial assistance, technical support, and other guidance
- Performs project tasks that can be done remotely, as well as participating in service during site visits
- Prepares any vocational training teams or scholars for travel and study abroad

**Both sponsors**
- Must be qualified to participate in a global grant
- Develop a project plan
- Have project committees that collaborate with each other
- Partner with a cooperating organization (a nongovernmental organization, community group, or government entity) if needed
Cooperating Organization MOU

- Parties to Agreement
- Purpose
- Understandings
- Responsibilities
- Conflict of Interest
- Signatures

MEMORANDUM OF UNDERSTANDING
between
[HOST PARTNER]
and
[INTERNATIONAL PARTNER]
and
[COOPERATING ORGANIZATION]

1. Subject
Global Grant # [GRANT NUMBER] in [COMMUNITY], [COUNTRY]

2. Purpose
A cooperating organization is any reputable non-Rotary organization or academic institution that provides expertise, infrastructure, advocacy, training, education or other support for the grant. Cooperating organizations must comply with all reporting and auditing activities required by the Rotary Foundation and provide receipts and proof of purchase as required. 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 Global Grant.
MATCH THE PHRASE AND DESCRIPTION

- COOP ORG: Located outside the project country
- INTL SPONSOR: Located in/near community where project takes place
- HOST SPONSOR: Provides technical expertise, training, advocacy
PLAN YOUR PROJECT
SUCCESSFUL GRANT PROJECTS

- Address real community needs
- Are sustainable
- Involve participants, partners
- Have a solid plan
- Maintain proper stewardship of funds
PROJECT LIFECYCLE
PROJECT PLANNING – NUTS & BOLTS

- Form a 3-person grant committee; 2-person for District grant
- Assign roles
- Make a detailed implementation plan
Incorporate a Public Image plan
Create a Budget
Establish a document retention plan
Have a contingency plan
SET GOALS / MEASURABLE OUTCOMES

- Measurable
- Sustainable
- Qualitative (descriptive)
- Quantitative (numeric)
SET GOALS / MEASURABLE OUTCOMES

- Gather baseline data
- Determine method of measurement
- Create Timeline
BEGIN WITH THE END IN MIND

Rotary

GLOBAL GRANT MONITORING AND EVALUATION PLAN SUPPLEMENT

Global grant sponsors for humanitarian projects and vocational training teams must incorporate monitoring and evaluation measures within the area of focus section of the online grant application. This supplement contains The Rotary Foundation (TRF) standard measures for each area of focus as well as the standard terminology, definitions, and measurement methods. Following these standards helps ensure that the Foundation can track worldwide Rotarian efforts and accomplishments, and publish the results using the definitions used by other nonprofit organizations.

STEPS FOR MONITORING AND EVALUATION PLAN

1. Establish clear project goals.
2. Identify applicable Rotary Foundation standard measures.
3. Identify additional project-specific measures.*
4. Establish baseline data and the methods you’ll use to collect data.
5. Submit the plan as part of the online application.
6. Collect data during the project, and monitor progress.**
7. Evaluate data and submit results to the online report. Modify the documentation to include actual
CREATE A BUDGET

- Realistic
- Competitive bidding
- Reasonable prices
- Disclose conflicts of interest
CONFLICT OF INTEREST

- Exists when a Rotarian benefits financially or personally from a grant
- Benefit can be direct to a Rotarian or indirect to an associate of the Rotarian
A. Your Club is planning a literacy project. One of your members who volunteers to be on the 3-person grant committee is also a board member of the organization that will be cooperating on the project.

B. Your Club is planning a water and sanitation project. You conducted a competitive bidding process for equipment purchase. The best bid was submitted by a company owned by one of your Club members.

Can this grant be funded? How to proceed?
DISTRICT GRANT FINANCING

- Qualified Clubs may use their Fair Share Funding to support District Grant projects

- If total requests exceed the District’s Block Grant Funds, Grant Allocation Group will allocate available DDF

- Clubs are guaranteed 50% of requested DDF allocation if project meets guidelines
GLOBAL GRANT FINANCING

- Minimum $30,000
- International sponsor provides 30% of funding
- Qualified Clubs allocate their Fair Share DDF
- DDF matched 100% by World Fund
- Rotarian and non-Rotarian cash contributions matched 50% by World Fund
SAMPLE BUDGET GLOBAL GRANT

- Clubs’ contribution = $10K
- 5% Club Cash ‘admin fee’ $500
- Clubs’ Fair Share DDF = $10K
- TRF matches DDF 1/1 = $10K
- TRF matches Clubs .5/1= $5K
- TOTAL PROJECT= $35.5K

(TRF minimum funding = $15K)
Discuss with your Club (and Partners)
Review *10 Tips for Improving Your Global Grant*
Review *6 Steps to Sustainability*
Use the Resources available to help
Would this project be approved for a Global Grant?

Would this project be approved for a District Grant?
APPLY
GLOBAL GRANTS – HOW TO APPLY?

- Online only www.rotary.org/myrotary
- Can be submitted at any time
- Consult with District re DDF
- District confirms Club is Qualified
- Allow at least 90 days prior to travel
GLOBAL GRANT FIRST STEPS

- Sign in to My Rotary
- Select Grant Center from TRF Tab Menu
Use the Rotary grants tool to apply for a grant, track its progress, report on it, and search for other grants in your district.

**Types of grants**

The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training teams. Here's an overview:

- **Global grants** support large international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus. They range from $15,000 to $200,000.

- **District grants** fund smaller-scale, short-term projects that address immediate needs in your community or abroad.

- **Packaged grants** fund up to 10 scholarships each year for students in a master's program on water and sanitation at the UNESCO-IHE Institute for Water Education in Delf, Netherlands.

**The lifecycle of a Rotary grant**

1. **Draft**
   - Rotary members plan a project or scholarship and build their grant application online
2. **Authorization**
   - Club and district leaders review the application and authorize funding
3. **Submitted**
   - The grant's planners submit the application to The Rotary Foundation
4. **Approved**
   - If the grant is approved, the Foundation issues payment
5. **Completion**
   - Members carry out the project, reporting to the Foundation annually until the work or studies are finished and the grant is closed.

**Grant Resources**

- Questions about the grant process? We're here to help, from getting you started to final steps.
- Application Supplement for Microcredit Projects
- Areas of Focus Policy Statements
- Conflict of Interest Policy for Program Participants
- Cooperating Organization Memorandum of Understanding
- Global Grant Calculator
- Global Grant Lifecycle
- Global Grant Monitoring and Evaluation Plan Supplement
- Global Grant Scholarship Supplement
- Grant Travel
- Guide to Global Grants
- Guidelines for Rotary
GLOBAL GRANT FIRST STEPS

Apply for a Grant

My Grants

Apply Now

Choose the type of grant you're applying for:

Select Grant Type

Let's begin!
GLOBAL GRANT 12 STEPS

All fields are required unless noted as "optional".

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Finalize & Submit

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HOW TO USE THE GRANT CENTER

The Grant Center is the place to go for everything you need to do online for your Rotary Foundation grants, and it keeps all of Rotary’s grant-related resources handy for you. This guide will show you how to:

- Navigate the Grant Center
- Apply for a Global Grant
- Authorize a Global Grant Application (club presidents and district leaders)
- Enter Global Grant Bank Account Information
- Report on a Global Grant
- Authorize a Global Grant Report
- Apply for a District Grant (district leaders only)

For general information about grants, go to Rotary.org’s Grants page.

Navigate the Grant Center

The Grant Center’s landing page gives an overview of Rotary grants and links to helpful resources.
GLOBAL GRANT APPLICATION TEMPLATE

The following pages outline the questions you will be asked on the online global grant application. You can use this document for planning purposes. Find the actual grant application at www.rotary.org/grants.

Step 1: Basic information

What’s the name of your project?

What type of project are you planning? (Humanitarian project, vocational training, scholarship)

All global grants support activities within Rotary’s areas of focus:

Select the primary host and international contact for this project.
The primary host contact will be the organization in the country where the project will take place, while the international contact will be in another country. Both are typically members of Rotary and related correspondence and reporting to The Rotary Foundation.

Step 2: Committee members

The committee will include at least three members from the host organization, the international host, and the international sponsor.

Who will serve as the grant’s host committee?

Who will serve on the grant’s international committee?

Do any of these committee members have potential conflicts of interest?

A conflict of interest is a relationship through which an individual or an organization benefits for which individual or organization’s financial, professional, or other interest, either individually or in concert with others, is in the public interest.

Global Grant Application Template (December 2019)

A GUIDE TO GLOBAL GRANTS

Rotary Grants: Building a Global Grant

Audience: All Rotarians

This course focuses on how to develop a global grant that will have long-term impact and relates to one or more of Rotary’s areas of focus.

Updated: 7/2016

TAKE ACTION: www.rotary.org/grants
DISTRICT GRANTS – HOW TO APPLY?

Online on District website
Thank you for the good work your Club is about to do! Applications for DDF (District Designated Funds) are completed on-line and must be received by JUNE 1, 2018. See District Grant Policy 2018-2019 (link) and TRF "Terms and Conditions for Rotary Foundation District Grant Projects" (link) for reference, as needed. If you have questions about this application, please contact District Grants Coordinator Cyndy Simms at districtgrants5150@gmail.com or 909-544-9966. Thank you for applying!

LEAD CLUB NAME *

IF MULTI-CLUB PROJECT, LIST NAMES OF SUPPORTING CLUBS *

PROJECT NAME *

Briefly describe the project and what the project will do. *

Start Date *

Estimated Completion Date *
DISTRICT GRANTS TIMELINE

**MOU and Addendum** signed and submitted by April 1, 2018

**District Grant application** submitted by June 1, 2018

**Final or Interim Report** submitted online no later than May 1, 2019 or for projects over one year, **Final Report no later than May 1, 2020**
IMPLEMENT, MONITOR, EVALUATE
IMPLEMENT AND MONITOR

- Communicate!
- Follow project plan
- Monitor
- Questions?
- Get pre-approval for changes
- Keep good records
REMINDERS

**KEEP**

- All grant correspondence
- Beneficiary documentation
- Cooperating organization MOUs and memoranda
- Vendor documentation
- Inventory
- Photos of project
EVALUATE

Evaluation
- Assists with reporting
- Improves future projects
- Is based on goals
- Is ongoing
- Allows for resolving problems
- Identifies successes
REPORT, SHARE, CELEBRATE
Why is reporting on the use of grant funds so important?
DISTRICT GRANT REPORTS

For 2018-19 Grants:

- Submit Final or Interim no later than May 1, 2019
- For projects longer than one year, Final Report no later than May 1, 2020
- Online through District website
- Return unused funds to District
GLOBAL GRANT REPORTS: Frequency

Progress reports
- Within 12 months of first payment
- Every 12 months through the life of the grant

Final report within 2 months of completion
GLOBAL GRANT REPORTS Include:

- How partners were involved
- Type of activity
- Evaluation of project goals
- How area of focus goals were met
- How funds were spent
- Number of beneficiaries and how they benefited
Handling of unused funds

- >$500 TRF must approve use for project-related expenses OR return to TRF and credited to World Fund

- <$500 may be used for activities that meet the global grant eligibility requirements and do not require pre-approval from TRF
CELEBRATE SUCCESS – SHARE THE STORY!
GRANTS – ASSISTANCE!

- District Grants Chair, Committee & Technical Resource Cadre
- District Rotary Foundation Chair & Committee
- District International Service Chair
- District website www.district5150.org
GRANTS – ASSISTANCE!

- TRF Technical Resource Cadre
- Assistant RRFC & RRFC
- TRF Grants Officer
- Areas of Focus Managers
- Rotarian Action Group
- www.rotary.org/myrotary
- www.zone2526.org/TRF Resources
- Colleagues
The Rotary Foundation

The Rotary Foundation transforms your gifts into projects that change lives both close to home and around the world. As the charitable arm of Rotary, we tap into a global network of Rotarians who invest their time, money, and expertise into our priorities, such as eradicating polio and promoting peace. Foundation grants empower Rotarians to approach challenges such as poverty, illiteracy, and malnutrition with sustainable solutions that leave a lasting impact. Strong financial oversight, a stellar charity rating, and a unique funding model mean that we make the very most of your contribution. Give and become a part of Rotary's life-changing work!

The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, good will and peace through the improvement of health, the support of education and the alleviation of poverty.

TRF Resources

Contact Us

Steve Lewis | Zone 25 – Regional Rotary Foundation Coordinator
Email Steve

Marge Cole | Zone 26 – Regional Rotary Foundation Coordinator
Email Marge

TRF RESOURCES
TRF Resource Guide (Zones 25 & 26)
TRF Centennial
Annual Giving (Every Rotarian, Every Year)
Contribution & Recognition
Endowments, Major Gifts & Planned Giving
Grants – Global and District Guides, Manuals & Reports
Paul Harris Society
PolioPlus (End Polio Now)
Rotary Peace Centers
TRF Logos & Infographics
Videos, Webinars, Presentations & Newsletters
GRANTS – ASSISTANCE!

- Grant Management Training Videos
  - Overview and MOU
  - District Grants
  - Global Grants

Zone 25 Grant Management Training Modules
TERMS OF QUALIFICATION

- Valid for one year
- Club responsible for grant funds
- Disclose conflicts of interest
- Cooperate with all audits
- Use grant funds properly
- Implement the Club MOU, including D5150 Addendum
People with Passion, People of Action, can change the world
GRANT MANAGEMENT TRAINING for 2018-19

Congratulations!

Thank You!