

# GRANT MANAGEMENT TRAINING

DISTRICT 5150

JANUARY 11 AND FEBRUARY 22, 2020



# TOGETHER WE ARE ROTARY

## Rotary International

Established 1905

501c-4 – Board of Directors

Plus General Secretary

Support Clubs and  
Charter Clubs

Promote Membership

Collect Dues

Set Policies, Admin

## The Rotary Foundation

Established 1917

501c-3 – Board of Trustees

Plus General Secretary

Raise Funds for  
Programs and Projects

Manage Funds

Collect Donations

Set Terms /Conditions for Grants

The  
**Rotary**  
Foundation



# 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 2020-21

# DOING GOOD IN THE WORLD



The background is a solid blue color. In the center, there is a faint, glowing globe. Overlaid on the globe is a complex network of thin, white lines that connect various points, resembling a global communication or social network. The lines are more concentrated in some areas and more sparse in others, creating a sense of dynamic connectivity.

**Together, we see a world where  
people unite and take action to  
create lasting change – across  
the globe, in our communities,  
and in ourselves.**



# GIVING – GRANTS – VIBRANT CLUBS



**We Are  
People of  
Action**



# GUIDING DOCUMENTS



TRF Grant Terms and  
Conditions

Memorandum of  
Understanding

District 5150 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 proper signage
- Follow Privacy Requirements

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 >\$1000
- 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

# EFFECTIVE GRANT MANAGEMENT

Ensures that projects

- Have proper financial controls
- Adhere to technical standards
- Meet the needs of *participants*
- Fulfill objectives
- Safeguard funds



# STEWARDSHIP

- **Rotarian supervision**
- Responsible management and oversight
- Proper use 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 T
- B. Aligns with The Rotary Foundation mission T
- C. Allows unrestricted cash donations to a beneficiary organization F
- D. No spending prior to approval T
- E. Rotarians must manage project and project funds T

# FUNDING BASICS

# FUNDING BASICS

PolioPlus

Annual Fund

Endowment Fund

3 – Year SHARE

Earnings

Year 1 Gifts

Year 2 Gifts

Year 3 Gifts

Projects

Income helps pay  
Operating costs

Year 4 Gifts



# DISTRICT DESIGNATED FUNDS (DDF)

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**

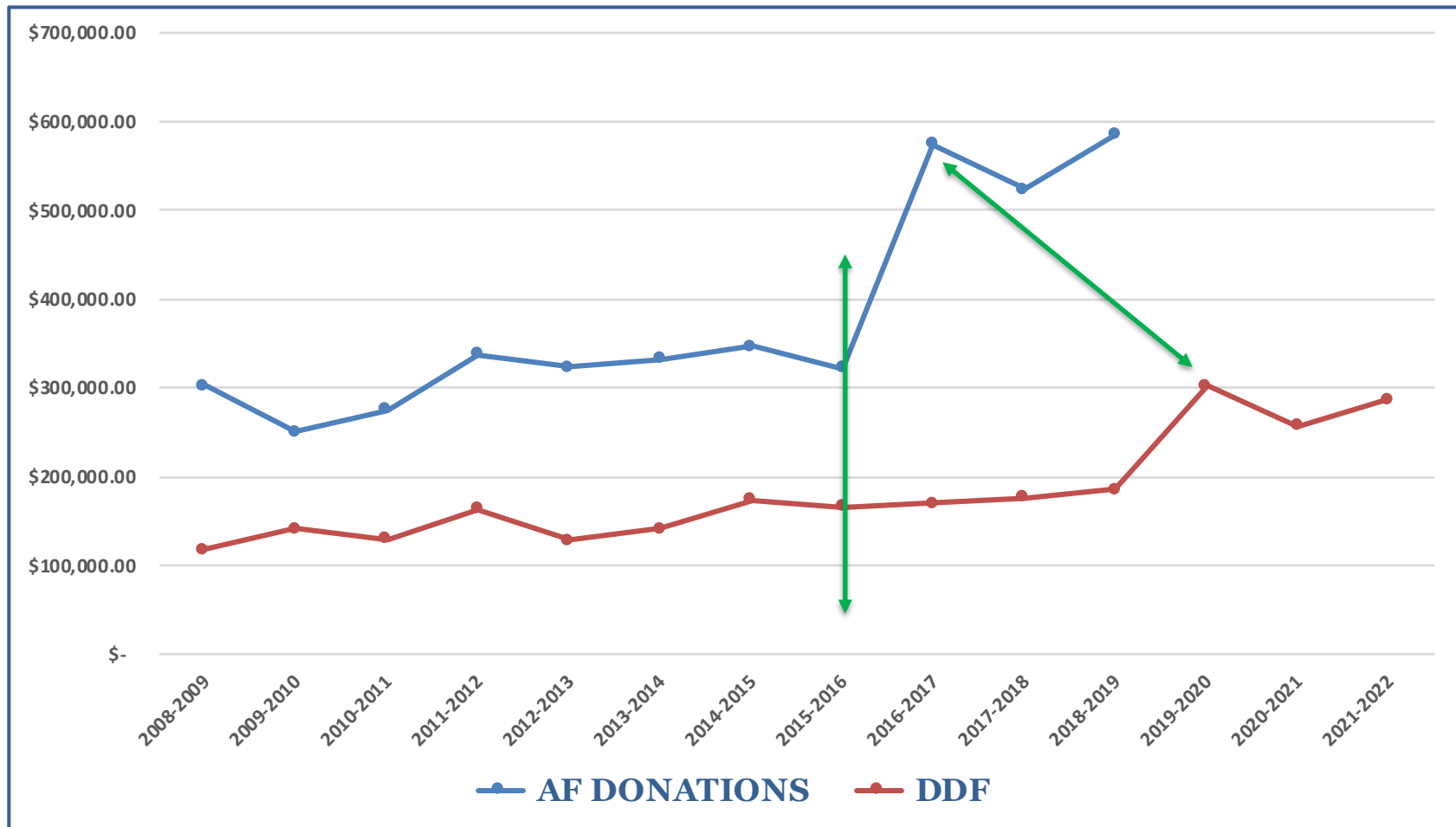
**Global Grants  
Donations to Polio,  
Peace Centers**

Global Grants  
Peace Centers  
Polio+





# ANNUAL FUND AND DDF RELATIONSHIP



# DISTRICT 5150 FAIR SHARE FUNDING

## Fair Share DDF Allocation Calculation

$$\begin{array}{c} \text{prior 3 years} \\ \text{Club's AF Donations} \div \text{Total D5150 AF Donations} \\ = \% \end{array}$$

X Available District DDF for year

= Club Fair Share DDF

# DISTRICT 5150 FAIR SHARE FUNDING

## Fair Share DDF Allocation Hypothetical

$$\begin{array}{r} \frac{2017-2020 \text{ Club's AF Donations}}{2017-2020 \text{ D5150 AF Donations}} = \frac{\$30,775}{\$1,384,871} \\ = 2.22\% \end{array}$$

X \$256,605 Available DDF 2020-21

= \$5702.35 **Club Fair Share DDF**

# QUALIFICATION

# DISTRICT 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 CLUB MEMORANDUM OF UNDERSTANDING

# CLUB 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](mailto:wg-arch@outlook.com)

# REPAYMENT OF TRF GRANT FUNDS

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
  - 2020-21 Club President and President Elect sign\*
  - 2020-21 Club President and one other have attended GMT

# MOU & ADDENDUM - QUALIFICATION

- 2020-21 Club President and President Elect (or alternate) and Club TRF Chair must take and pass Rotary Foundation Basics by 3/21/20
- Annual Fund goal in RCC by 4/1/20
- Club must be in “Good Standing”
  - Financial
  - Reporting
  - Tax Returns



# D5150 MOU ADDENDUM

- Clubs must be qualified by April 1, 2020 in order to receive DDF for either a District or Global Grant in 2020-21



# TERMS OF QUALIFICATION

- Valid for one year
- Qualification must be maintained for life of GG
- Club responsible for grant funds
- Disclose conflicts of interest
- Cooperate with all audits
- Use grant funds properly
- Implement the Club MOU, including D5150 Addendum

# 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

# RECAP T or F

- The MOU is a serious document with specific club and officer responsibilities. T
- The MOU holds Rotarians to the highest ethical standards. T
- The MOU requires organization and transparency. T
- The best way to get your PE to sign is to cover up the writing and tell him/her you just want an autograph. F

# TYPES OF GRANTS

# ROTARY FOUNDATION GRANTS

- District grants
- Global grants



# ROTARY FOUNDATION GRANTS

District  
Disaster Relief  
Grants

Programs of  
Scale Grants





# ROTARY FOUNDATION GRANTS

- District Grants
  - Humanitarian Projects
  - District Scholars
  - Vocational Training Teams
- Global Grants
  - Humanitarian Projects
  - Global Scholars
  - Vocational Training Teams





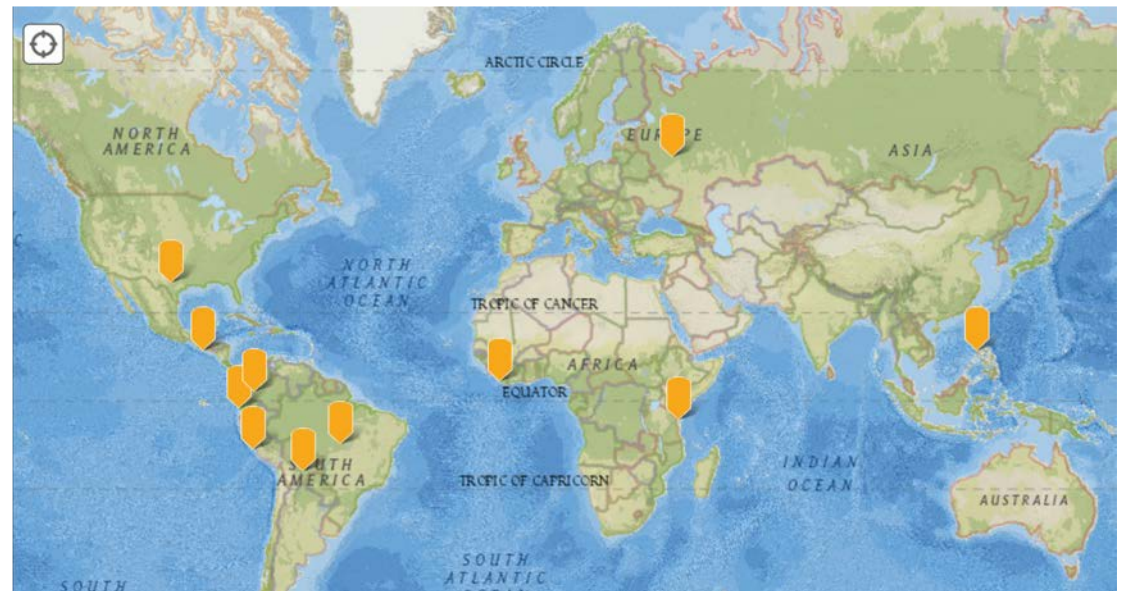
# DISTRICT GRANTS – WHAT ARE THEY?

- Managed by District
- Local or International projects
- Shorter term, smaller-scale projects
- Humanitarian Service\*, Vocational Training Teams (VTTs), Scholarships
- Aligned with TRF mission



## DISTRICT GRANTS – OTHER POSSIBILITIES

- Community Needs Assessment
- Project Fairs



<https://my.rotary.org/en/exchange-ideas/project-fairs>

# DISTRICT SCHOLARSHIPS

- Any level, length of time, location or area of study
- May be used for vocational training
- 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



# 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 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 International 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?





<b>PARAMETERS</b>	<b>DISTRICT GRANT</b>	<b>GLOBAL GRANT</b>
<b>DURATION</b>	1 Year (approx.)	1/ 2+ Years
<b>PURPOSE</b>	HUMANITARIAN PROJECTS SCHOLARSHIPS VOCATIONAL TRAINING TEAMS	HUMANITARIAN PROJECTS SCHOLARSHIPS VOCATIONAL TRAINING TEAMS
<b>AREA OF FOCUS</b>	Not Required by TRF	YES and Within Specific TRF Policy Guidelines
<b>HOST PARTNER</b>	NO	YES
<b>LOCATION</b>	LOCAL OR INTERNATIONAL	INTERNATIONAL
<b>ACTIVE ROTARIAN INVOLVEMENT</b>	YES	YES

# MAKING A SUSTAINABLE IMPACT

# SUSTAINABLE PROJECTS

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



# COMMUNITY NEEDS ASSESSMENT



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



# COMMUNITY NEEDS ASSESSMENT



## COMMUNITY ASSESSMENT TOOLS

A resource for Rotary projects



Community meeting



Survey



Interview



Focus group



Asset inventory



Community mapping

# RECOMMENDED STAKEHOLDERS

## **Peace and conflict prevention/ resolution**

- Victims of violence, refugees, or internally displaced people
- Perpetrators of violence
- Factions that are at odds with each other
- Civil society organizations
- Schools and educational institutions
- Local government and law enforcement authorities

When you're assessing sensitive populations such as trauma victims or communities in conflict, it is crucial that you work directly with individuals or organizations that understand the dynamics of the situation. These collaborations will ensure that the assessments are conducted appropriately, with the best possible outcome.

## **Water and sanitation**

- Community leaders, particularly women
- Ministries of water, sanitation, or environment
- Ministries of education, along with students, teachers, headmasters, and parent associates (WASH in

- Farmers (irrigation)
- WASH advocacy associations
- WASH organizations working in the area

## **Basic education and literacy**

- Teachers
- Parents
- Students
- Youth who do not attend school
- School administrators
- School management committees
- Ministries of education
- Adult education institutes
- Vocational training institutes
- Community and technical colleges
- Libraries and librarians

## **Disease prevention and treatment & maternal and child health**

- Individual health care recipients:
  - Pregnant women
  - At-risk children
  - Adults at risk for noncommunicable and communicable diseases
  - At-risk aging population

- Access and continuum of care structures:
  - Prevention, primary care, and referral systems
  - Transportation providers
  - Hospitals
  - Follow-up and rehabilitation services
  - Chronic care support and palliative/hospice care systems

## **Economic and community development**

- Local government authorities
- Women's groups
- Government extension services
- Job research centers
- Entrepreneurs
- Ministries of trade, agriculture, social services, women's empowerment, and vocational services
- Farmers
- Unemployed youth and adults
- Business owners
- Banks
- Cooperatives (agricultural, savings and loan, etc.)

# COMMUNITY NEEDS ASSESSMENT

ENGLISH (EN)



## Required for all Global Grants

### 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

Click or tap here to enter text.

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

Click or tap here to enter text.

Beneficiaries' demographic information, if relevant to the project

Click or tap here to enter text.

Who conducted the assessment? (check all that apply)

- ☐ Host sponsor members
- ☐ International sponsor members
- ☐ A cooperating organization



# SELECT PROJECT



Community meeting



Focus group



Survey



Asset inventory



Interview



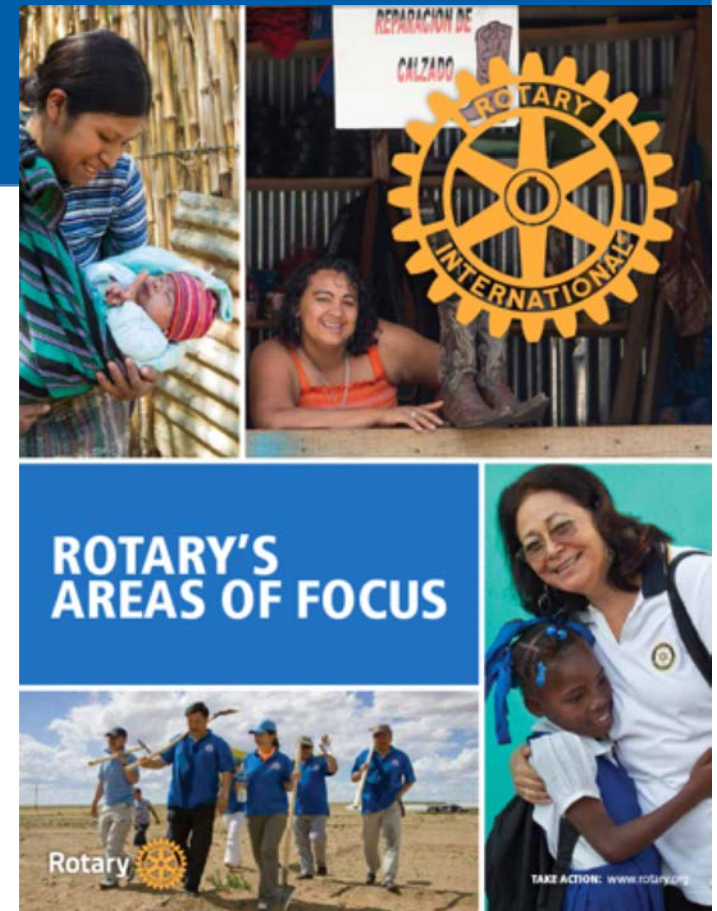
Community mapping



- Base project on community's needs
- Assess resources of your Club and potential partners
- Talk to the community
- Maximize Public Image opportunities

# 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



ENGLISH (EN)

## AREAS OF FOCUS POLICY STATEMENTS

With respect to the areas of focus policy statements, The Rotary Foundation notes that

1. The goals of the Foundation are to increase efficiency in grant processing and ensure quality of funded projects;
2. The content of each policy statement is intended to represent eligible and ineligible activities;
3. Eligible activities reflect those that Rotary clubs and districts have most often implemented;
4. Project planning is a bottom-up and host club/district-driven process;
5. All grant requests must comply with the policy statements related to each area of focus.

### PEACE AND CONFLICT PREVENTION/RESOLUTION

Rotary supports the training, education, and practice of peace and conflict prevention and resolution.

#### Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to promote the practice of peace and conflict prevention/ resolution by:

1. Training leaders, including potential youth leaders, to prevent and mediate conflict;
2. Supporting peace-building in communities and regions affected by conflict;
3. Supporting studies for career-minded professionals related to peace and conflict prevention/resolution.

#### Parameters for Eligibility

TRF considers activities targeting the following to be within the scope of the peace and conflict prevention/resolution area of focus:

1. Community activities targeting non-Rotarian participants, including conferences, trainings, and camps, in support of nonviolence, peace-building, and human rights;
2. Facilitated conflict resolution workshops related to topics addressing community needs such as policy development, business activities across conflict lines, educational reform, and peace journalism;
3. Supporting initiatives addressing psychological effects of conflict;
4. Educating youth on preventive measures to avoid conflict;
5. Training programs or campaigns to address negative social dynamics in a community, including but not limited to anti-gang efforts and those to overcome radical differences;



# GUIDELINES FOR FUNDING AND IDEAS!



## PEACE AND CONFLICT PREVENTION/RESOLUTION GUIDELINES FOR GLOBAL GRANT FUNDING

Rotary is dedicated to six [areas of focus](#) to build international relationships, improve lives, and create a better world. Through [global grants](#), awarded by The Rotary Foundation, clubs and districts participate in strategically focused, high-impact activities in these areas.

All global grant activities are required to align with the goals of an area of focus. For peace and conflict prevention/resolution, the goals are:

1. Train leaders, including potential youth leaders, to prevent and mediate conflict
2. Support peacebuilding in communities and regions affected by conflict
3. Support studies related to peace and conflict prevention/resolution for career-minded professionals

Use this document as a guide when applying for a global grant. You'll learn how to make your project sustainable, what information is required for specific project types, and where to find additional resources.

When considering projects in peace and conflict prevention/resolution, pay special attention to the risk of, or recovering from, violent conflict. This approach, called conflict sensitivity, requires you to look at specific dynamics within a community that can help heal it or risk further dividing it.

### A. Elements of Sustainability

<https://my.rotary.org/en/take-action/apply-grants/global-grants>



ENGLISH (EN)

### 5. DOMESTIC VIOLENCE AND HUMAN TRAFFICKING PROGRAMS

In recent years, Rotary has seen a growing interest in global grant projects that address domestic violence and human trafficking. Both areas have the potential to be a strong focus for conflict prevention/resolution. Some examples of how Rotarians might work in these areas include:

- Providing psychosocial support for victims of domestic violence or trafficked persons
- Working with existing programs to expand their ability to assist these populations
- Skills training for domestic violence victims or trafficked persons to reintegrate them into home communities or communities where they now reside.
- Prevention and advocacy programs related to both domestic violence and human trafficking. Ensure these advocacy campaigns are well coordinated with existing organizations at the municipal government level.

### 6. ADDITIONAL IDEAS FOR PEACEBUILDING PROJECTS

Some examples of less common but acceptable projects in the peacebuilding and conflict resolution fields include:

- Security-based projects. Community-based policing is an approach that brings together the police, civil society, and local communities to work together to develop solutions to local safety and security.
- Socioeconomic initiatives. Community-based approaches to economic development have been adopted for conflict-prone regions. By forming cooperatives that bring together groups from different areas that may have previously been in conflict, these projects can foster social capital and cooperation across divides and build the foundation for reintegration and reconciliatory processes. Some examples include:

# BUILD CAPACITY – HAND UP NOT HANDOUT

## RECAP: What Makes A Project Sustainable?

- A. Includes Training T
- B. Begins with a Community Needs Assessment T
- C. Is designed by the international sponsor club F
- D. Uses technology and materials T  
appropriate/available in the local community
- E. Includes ongoing monitoring and evaluation T
- F. Is supported by beneficiary contributions F

# PARTNER TO MAXIMIZE IMPACT

# PROJECTS AND PARTNERS

- RI Convention
- Project fairs
- Other Clubs / Districts
- Rotary Showcase
- Rotary Ideas
- Facebook
- International travel
- Rotary events – VTTs – Scholars - RYE
- [www.matchinggrants.org](http://www.matchinggrants.org)



# ROTARY IDEAS – ROTARY SHOWCASE



My Rotary

Rotary.org | Club Finder



JOIN | DONATE

Exchange Ideas

Take Action

Learning & Reference

Manage

The Rotary Foundation

News & Media

Member Center



## Rotary Spotlight



Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves. [Read more on our strategic plan >](#)





# ROTARY IDEAS – ROTARY SHOWCASE

Exchange Ideas

Take Action

Learning & Reference

Manage

The Rotary Foundation

News & Media

Member Center

## Give

Ways to Give

Planned Giving

Donor Recognition

GIVE NOW

## End Polio

## Develop Projects

Lifecycle of a Project

Rotary Club Central

Rotary Ideas

Rotary Showcase

## Apply for Grants

Grant Center

District Grants

Global Grants

Qualification

Grant Travel

## Empower Leaders

Sponsor a Rotaract club

Sponsor an Interact club

Organize a RYLA Event

Create a Scholarship

Start an Exchange

Support Peace Centers

Join a Rotarian Action Group

Form a Rotary Fellowship

Organize a Rotary Community Corps



# PROJECTS AND PARTNERS – Rotary Ideas



## Motorcycle library for underdeveloped village

Mandalamekar, 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.



1



## 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 late detection of the disease.



0

2

1



## Mount Holly Community Garden Center

The Mount Holly Rotary Club is partnering with the Mount Holly Community Garden to build a butterfly garden, educational workshop area, and pergola.



0



Online Contributions



Volunteers



Materials



Partners



# ROLE OF PARTNERS – Global Grant



## 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
- Submit project reports in the Grant Center

# WHO ELSE – COOPERATING ORGANIZATION

## 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



# PLAN YOUR PROJECT

- Address real community needs
- Have measurable goals and outcomes
- Ensure sustainability
- Use expert advice
- Involve participants and partners
- Have ongoing monitoring and evaluation
- Maintain proper stewardship of funds



# PROJECT PLANNING – NUTS & BOLTS

- Form a 3-person grant committee; 2-person for District grant
- Assign roles
- Make a detailed implementation plan





# PROJECT PLANNING – NUTS & BOLTS

- Incorporate a Public Image plan
- Create a financial plan
- Secure funding
- Establish a document retention plan
- Have a contingency plan



# SET GOALS / MEASURABLE OUTCOMES

- Use your Community Assessment
- Gather baseline data
- Determine method of measurement
- Create Timeline



# BEGIN WITH THE END IN MIND

ENGLISH (EN)



## 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 – required for significant expenses
- Reasonable prices/ Good quality
- 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



# CONFLICT OF INTEREST

Your Club is planning to renovate a community park. You conducted a competitive bidding process to select a landscaping contractor. The best bid was submitted by a company owned by one of your Club members.

Can this grant be funded? How to proceed?

# FUNDING



# 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)

Note: Grant financing cannot be changed once approved

# GLOBAL GRANT BUDGET NOTES

- May include up to 10% contingency
- May include up to 10% for project management
- May include up to 10% for measuring project outcomes





# 10 TIPS

ENGLISH (EN)



## 10 WAYS TO IMPROVE YOUR GLOBAL GRANT APPLICATION

1. Conduct a thorough assessment of community needs and strengths
2. Based on needs assessment, identify the most appropriate area of focus
3. Provide a detailed project implementation plan that encompasses all aspects of the proposed project activity
4. Provide a detailed listing of the specific tasks that both the host and international Rotarians will carry out in conjunction with the project
5. Provide a detailed budget with vendor information and information about how these vendors were selected
6. Clearly explain specific sustainability components
7. Include DETAILED information for each training opportunity presented in application
8. Include MOUs for each cooperating organization
9. Include specific information related to measurement and evaluation
10. Complete the entire application

# 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

# A GOOD DISTRICT GRANT?

- A. Purchasing the decorations and supplies for a fundraiser to support two students to RYLA
- B. Working with the Senior Center to identify homes that need retrofitting for disabled access and then completing the work with Club members and other professionals
- C. Donating \$8,000 to the local homeless shelter to help outfit a new kitchen



# GRANT APPROVAL WORKSHOP

Would this project be approved for a Global Grant?

Would this project be approved for a District Grant?

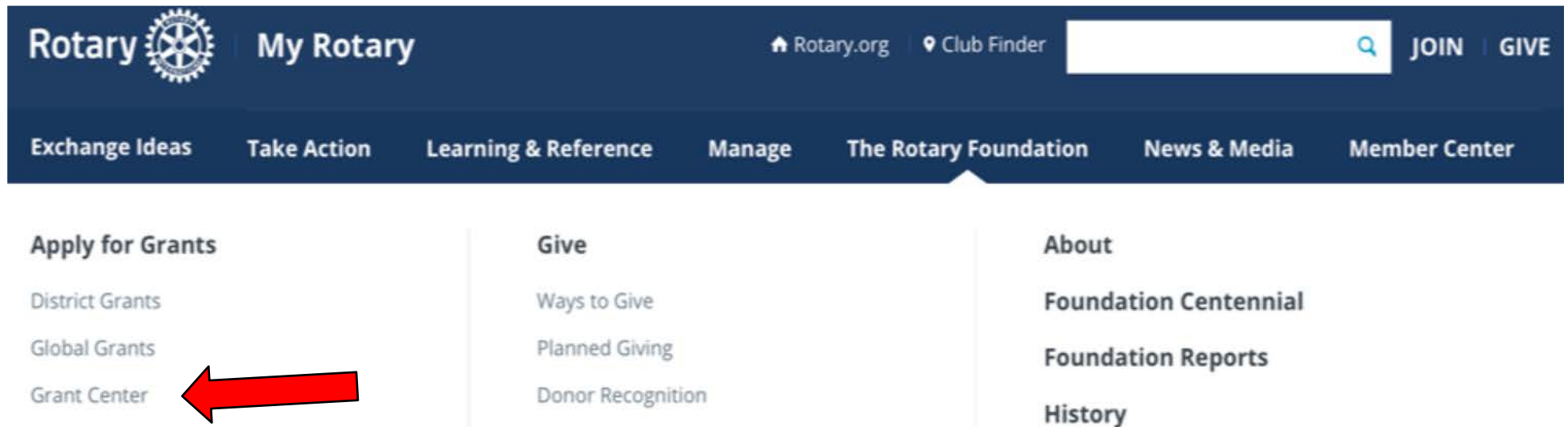
# APPLY

# GLOBAL GRANTS – HOW TO APPLY?

- Online only  
[www.rotary.org/myrotary](http://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

# GRANT CENTER

## Rotary Grant Center

Welcome to Rotary grants! As Rotary members, we contribute our skills, expertise, and resources to solve some of the world's most serious problems. From providing clean water in local communities to promoting peace worldwide, Rotary grants can bring your project ideas to life.

Use the Rotary grants tool to apply for a grant, track its progress, report on it, and search for other grants in your district.

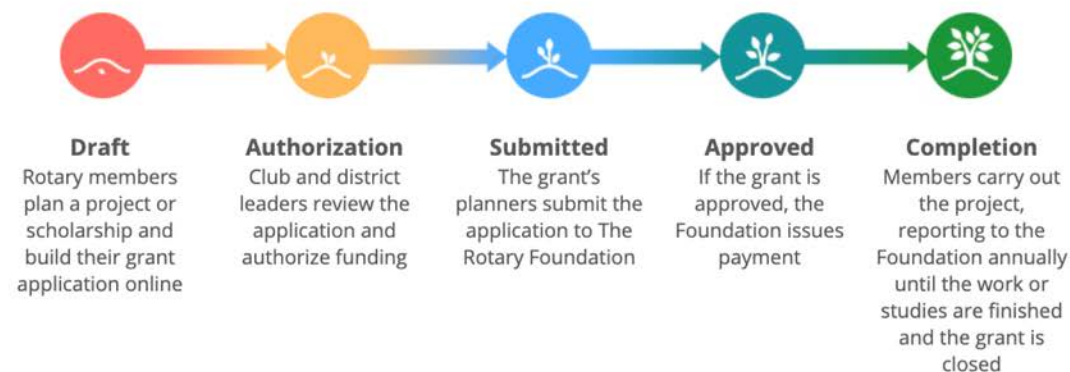
### Types of grants

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.

### The lifecycle of a Rotary grant



### 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](#)

[Community Assessment Results](#)

[Cooperating Organization Memorandum of Understanding](#)

[Global Grant Application Template](#)

[Global Grant Calculator](#)

[Global Grant Lifecycle](#)

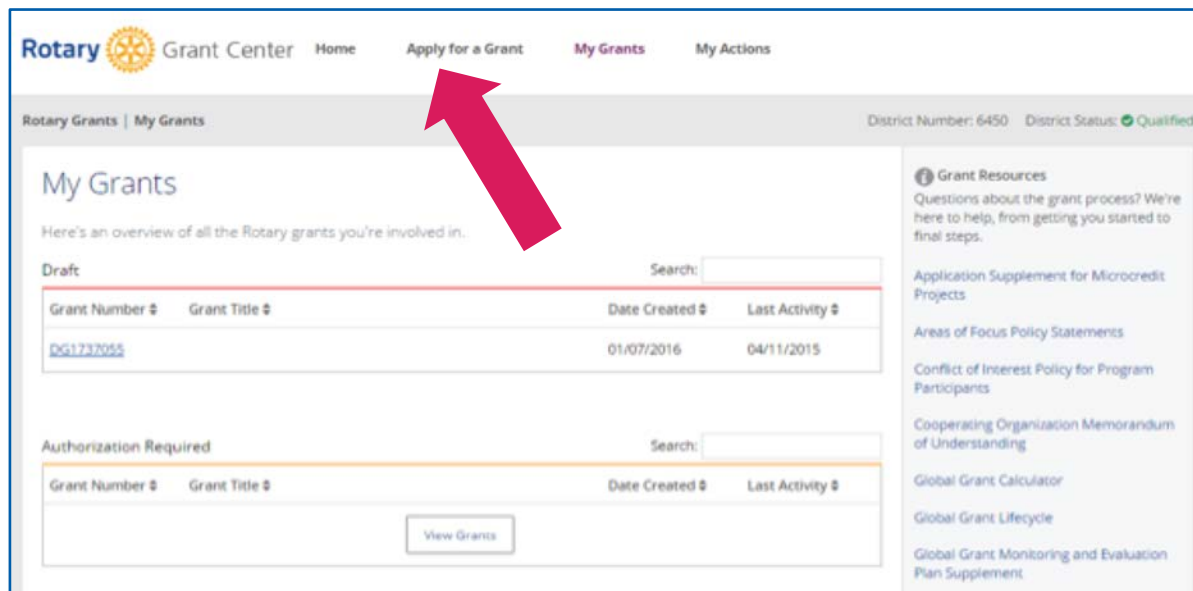
[Global Grant Monitoring and Evaluation Plan Supplement](#)

[Global Grant Report Template](#)

[Global Grant Scholarship Supplement](#)

[Grant Travel](#)

# GLOBAL GRANT FIRST STEPS



Rotary Grant Center Home **Apply for a Grant** My Grants My Actions

Rotary Grants | My Grants District Number: 6450 District Status: Qualified

## My Grants

Here's an overview of all the Rotary grants you're involved in.

**Draft** Search:

Grant Number #	Grant Title #	Date Created #	Last Activity #
<a href="#">DG1737055</a>		01/07/2016	04/11/2015

**Authorization Required** Search:

Grant Number #	Grant Title #	Date Created #	Last Activity #
----------------	---------------	----------------	-----------------

[View Grants](#)

**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

## Apply Now

Begin the grant application only after your club, district and partners have finalized the project plan and you've contacted your district about your project's need for funding. Answer every question clearly and concisely. Your regional grants officer will work with you to make any changes your application needs in order to meet grant criteria.

Choose the type of grant you're applying for:

Select Grant Type

Let's begin!

[Training Plan for Global Grants](#)

[Vocational Training Team Itinerary](#)

[Vocational Training Team Member Application](#)



# APPLICATION

## Grant Application

All fields are required unless noted as "optional".

Step 1: Basic Information

Enter some basic information, and then we'll give your application a number.

What's the name of your project?

100/100 characters

What type of project are you planning?  
Check all that apply. This will tell us what else we need to ask you.

- ☐ **A humanitarian project**  
Address community needs and produce sustainable, measurable outcomes
- ☐ **Vocational training**  
Build skills within a community by supporting a team of professionals that will travel abroad to train or learn from colleagues in the community they visit
- ☐ **A scholarship**  
Fund international graduate-level study by someone seeking a career within an area of focus

Select the primary host and international contacts for this project.

Name	District	Sponsor	Role
+Add Primary Contact    Notify Primary Contact			

Switch host, international contacts, and committees.

**Save & Continue**    Exit

### GRANT INFORMATION

**GRANT NUMBER**  
...

**STATUS**  
...

**LAST ACTIVITY**  
24/10/2016

Print application (PDF)

**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 Application

Saving Mothers and Children in Guinea

All fields are required unless noted as "optional".

Step 1: Basic Information ✓

Step 2: Committee Members

## GRANT INFORMATION

GRANT NUMBER

GG1744555

STATUS

Draft

LAST ACTIVITY



Who will

Who will serve on the grant's Host committee?



AUTO-SUBMIT

☒ Auto-submit is ON



Step 1: Basic Information ✓

Step 2: Committee Members

Step 3: Project Overview

Step 4: Areas of Focus

Which area of focus will this project support?

Select at least one area. Note that we'll ask you to set goals and answer questions for each area of focus you select.



- ☐ Peace and conflict prevention/resolution
- ☐ Disease prevention and treatment
- ☐ Water and sanitation
- ☐ Maternal and child health
- ☐ Basic education and literacy
- ☐ Economic and community development

Save & Continue

Exit

Save & Continue

Exit

Skip

# GLOBAL GRANT 12 STEPS

All fields are required unless noted as "optional".

Step 1: Basic Information ✓

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 ✓

Finalize & Submit

Step 11: Review and Lock

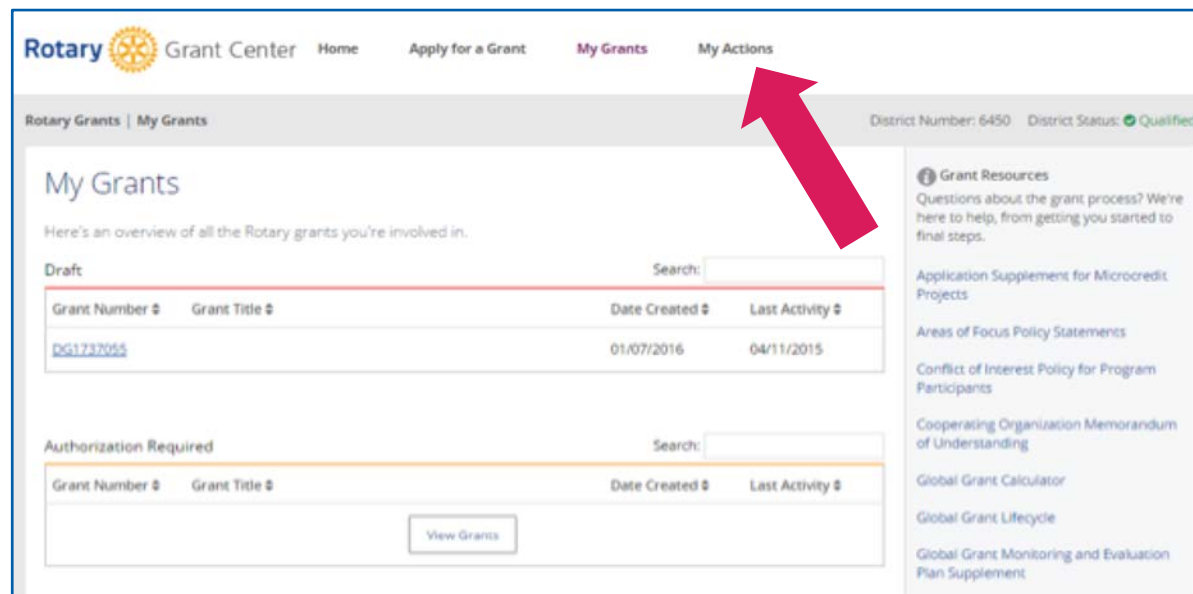
Step 12: Authorizations

# GLOBAL GRANT FIRST STEPS

Finalize & Submit

Step 11: Review and Lock

Step 12: Authorizations



The screenshot shows the Rotary Grant Center interface. The top navigation bar includes links for Home, Apply for a Grant, My Grants, and My Actions. A red arrow points to the 'My Actions' link. Below the navigation bar, the 'My Grants' section is active, displaying a table of grants. The table has columns for Grant Number, Grant Title, Date Created, and Last Activity. A search bar is located above the table. The table shows one grant with the number DG1737055, created on 01/07/2016, and last activity on 04/11/2015. Below the table, there is a 'View Grants' button. On the right side, there is a 'Grant Resources' section with links to various documents and tools.

Rotary Grant Center Home Apply for a Grant My Grants My Actions

Rotary Grants | My Grants District Number: 6450 District Status: Qualified

### My Grants

Here's an overview of all the Rotary grants you're involved in.

Draft Search:

Grant Number #	Grant Title #	Date Created #	Last Activity #
DG1737055		01/07/2016	04/11/2015

Authorization Required Search:

Grant Number #	Grant Title #	Date Created #	Last Activity #
----------------	---------------	----------------	-----------------

View Grants

#### 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 FIRST STEPS

## Step 12: Authorizations

### YOUR AUTHORIZATIONS & LEGAL AGREEMENTS

#### Authorization ?

Getting your grant application authorized is the last step before submitting it to The Rotary Foundation. Review the information that has been entered in each step and then give your authorization below. Depending on your role, you may need to authorize the application more than once.

When you locked the application in step 11, an email was sent to club or district leaders who also need to authorize your application. In this step, you can see which of them have done so.

#### Primary contact authorizations

##### Application Authorization

By submitting this global grant application, we agree to the following:

1. All information provided in this application is, to the best of our knowledge, true and accurate, and we intend to implement the activities as presented in this application.
2. The club/district agrees to undertake these activities as a club/district.
3. We will ensure that cash contributions (as detailed in the grant financing) will be forwarded to The Rotary Foundation (TRF) or sent directly to the global grant bank account after Trustee approval of the grant.

✓ Authorize now

# GLOBAL GRANT LIFE CYCLE

## Application Phase

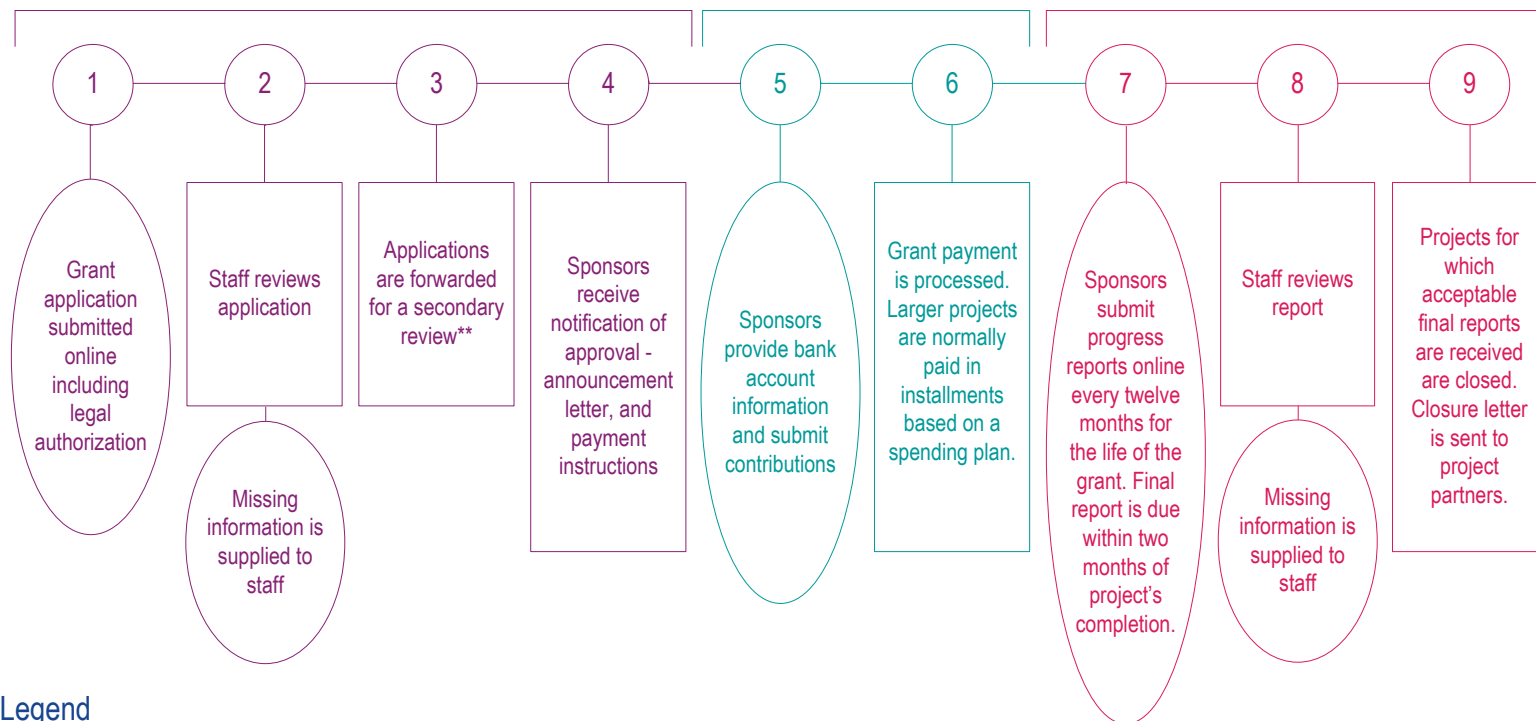
If application arrives at TRF complete, time from receipt to approval of application is approximately 4 weeks.\*

## Payment Phase

From time that TRF receives bank account information and contributions, processing of payment takes approximately 2-4 weeks.\*

## Reporting Phase

Staff review reports in the order in which they are received within 8 weeks of receipt at TRF.\*



## Legend

○ = Rotarian action

□ = TRF action

# GLOBAL GRANT REVIEW

## Review Process by Grant Award Size\*

World Fund request amount	Technical review	Interim site visit	Advance site visit	Approval by Trustees
\$15,000-\$50,000	● (depends on technical complexity)			
\$50,001-\$200,000	●	●		
\$200,001-\$400,000	●	● Project audit	●	●

\*The review process may vary if your project includes directed gifts.



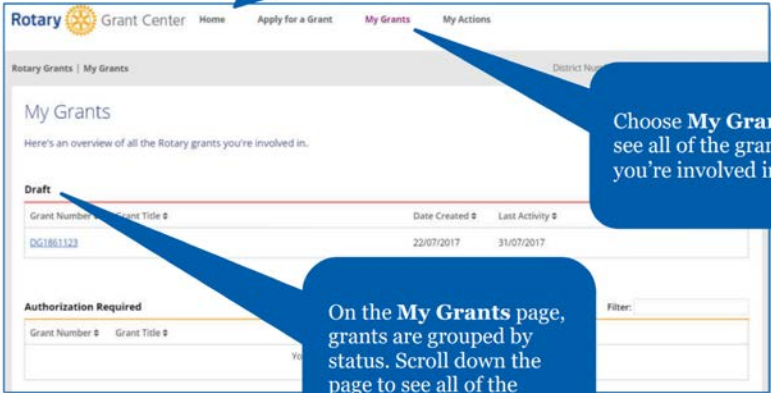
# GRANT CENTER HOW TO GUIDE

## 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:

- [Find the Grant Center](#)
- [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 \(District Leaders Only\)](#)
- [Report on a District Grant \(District Leaders Only\)](#)



Use the menus at the top to navigate the Grant Center.

Choose **My Grants** to see all of the grants you're involved in.

On the **My Grants** page, grants are grouped by status. Scroll down the page to see all of the grants in each status.

The screenshot shows the 'My Grants' page with a top navigation bar containing 'Home', 'Apply for a Grant', 'My Grants' (highlighted), and 'My Actions'. Below the navigation bar, the page title is 'My Grants' with a subtitle 'Here's an overview of all the Rotary grants you're involved in.' The main content area is divided into two sections: 'Draft' and 'Authorization Required'. The 'Draft' section contains a table with columns for 'Grant Number', 'Grant Title', 'Date Created', and 'Last Activity'. A single row is visible with the grant number 'DG1861123' and dates '22/07/2017' and '31/07/2017'. The 'Authorization Required' section is currently empty. A 'Filter:' input field is located on the right side of the page.

Webinar:  
<https://vimeo.com/212329193>

# RESOURCES



## AREAS OF FOCUS MANAGERS

Areas of focus managers provide support and guidance for Rotarian activities in the six areas of focus. Managers are available for consultation about project design, new initiatives, and grants.

Rotary

ENGLISH (EN)

### 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](https://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 contacts for this project.

The primary host contact lives in the country where the project, training, or study will take place. The primary international contact lives in another country. Both contacts will be responsible for all grant-related correspondence and reporting to The Rotary Foundation.

#### Step 2: Committee members

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

Who will serve on 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? If so, please briefly explain.

A conflict of interest is a relationship through which an individual involved in a program grant or award causes benefit for such individual or such individual's family, acquaintances, business interests, or an organization in which such individual is a trustee, director, or officer.

Global Grant Application Template (December 2016)

	<b>Rebecca Crall</b> Peace and Conflict Prevention/Resolution ☎ 847-866-3374 ✉ <a href="mailto:rebecca.crall@rotary.org">rebecca.crall@rotary.org</a> 🗣 English, Spanish, basic French 🕒 Started at Rotary in 2006
	<b>John Wahlund</b> Disease Prevention and Treatment ☎ 847-866-3248 ✉ <a href="mailto:john.wahlund@rotary.org">john.wahlund@rotary.org</a> 🗣 English and conversational 🕒 Worked at Rotary for
	<b>Mary Jo Jean-Franco</b> Basic Education and ☎ 847-424-5313 ✉ <a href="mailto:maryjo.jeanfranco@rotary.org">maryjo.jeanfranco@rotary.org</a> 🗣 English and 🕒 Started at Rotary in
	<b>Bonaventura</b> Economic ☎ 847-424-5313 ✉ <a href="mailto:bonaventura@rotary.org">bonaventura@rotary.org</a> 🗣 English 🕒 Started at Rotary in



# IMPLEMENT, MONITOR, EVALUATE

# IMPLEMENT, MONITOR, EVALUATE

- Communicate!
- Follow project plan
- Monitor throughout
- Get pre-approval for changes
- Keep good records
- Evaluate to share and document success, improve future projects, replicate/scale



# REMINDERS

## KEEP

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

### Document Retention Check List



Use this check list to ensure you are retaining the correct documentation. All documents must be saved to a cloud-based system or hardcopy and be accessible to members.

For club qualification	For district and global grants
<ul style="list-style-type: none"><li><input type="checkbox"/> Copy of signed club MOU</li><li><input type="checkbox"/> Financial management plan and related procedures</li><li><input type="checkbox"/> Bank information<ul style="list-style-type: none"><li>○ Account details</li><li>○ Bank statements</li><li>○ List of signatories</li><li>○ Bank procedure for changing signatories</li></ul></li><li><input type="checkbox"/> Legal documents</li><li><input type="checkbox"/> General ledger and statement of accounts</li><li><input type="checkbox"/> Document retention procedures</li><li><input type="checkbox"/> Succession plans</li><li><input type="checkbox"/> Correspondence on qualification</li><li><input type="checkbox"/> Other documents required by the district or local laws</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> All grant correspondence, including email</li><li><input type="checkbox"/> Beneficiary documentation:<ul style="list-style-type: none"><li>○ Community assessment</li><li>○ MOUs and Agreements</li><li>○ Training Agendas and Attendee lists</li></ul></li><li><input type="checkbox"/> Vendor documentation:<ul style="list-style-type: none"><li>○ Quotes for materials</li><li>○ Agreements</li></ul></li><li><input type="checkbox"/> Scholar documentation:<ul style="list-style-type: none"><li>○ Receipts and invoices</li><li>○ Agreements and report supplements</li></ul></li><li><input type="checkbox"/> Vocational training documentation<ul style="list-style-type: none"><li>○ Receipts and invoices</li><li>○ Agreements and report supplements</li></ul></li><li><input type="checkbox"/> Grant-related documentation:<ul style="list-style-type: none"><li>○ Bank statements</li><li>○ Quotes from vendors</li><li>○ Receipts and invoices</li><li>○ Inventory list</li><li>○ Photos</li></ul></li><li><input type="checkbox"/> Other documentation required by the district or local laws</li></ul>

# REPORT, SHARE, CELEBRATE



# 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

# GLOBAL GRANT REPORTS – UNUSED FUNDS

## 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!



# RESOURCES

# GRANTS – ASSISTANCE!

- District Grants Chair, Committee & Technical Resource Cadre
- District Rotary Foundation Chair & Committee
- District International Service Chair
- District website [www.district5150.org](http://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](http://www.rotary.org/myrotary)
- [www.zone2627.org/TRF Resources](http://www.zone2627.org/TRFResources)
- Colleagues



# ZONE GRANT MANAGEMENT VIDEOS



Zones 26 & 27  
Big West

[About Us](#)

[Institute](#)

[Education](#)

[Club/District Support](#)

[Branding](#)

[Our Foundation](#)

[Contact Resources](#)

Big West Foundation Coordinators

[www.zone2627.org](http://www.zone2627.org)

**WHAT WE DO:** Our team of experienced Rotarians are here to help you reach your fundraising and grants goals. We are able to assist with any challenges you may have with The Rotary Foundation. We can provide you with easy access to useful resources, speakers, *million dollar dinners*, END POLIO NOW celebrations, fund-raisers and endowment and major gift opportunities.

**HOW WE CAN HELP:** We help with District and Global Grant applications and assist with Community Assessment plans. Let us help facilitate your District's Strategic Plan to work with The Rotary Foundation. We offer help in training DRFC members and club Rotary Foundation Chairs. We can help in sharing best practices with our knowledge of how our Zone's 30 Districts operate.

**KEY PROGRAMS** planned for 2019-20:

- Regional Annual Zone TRF Workshops
- 3 Webinars during the 2019-20 year

[Meet the Big West Foundation Team](#), including our areas of expertise.

## TRF RESOURCES

[TRF Resource Guide \(Zones 26 & 27\)](#)

[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](#)





# GRANTS – ASSISTANCE!

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



Zone Grant Management Training Modules



# DISTRICT GRANTS – HOW TO!

# **DISTRICT GRANT APPLICATION**

**WHERE IS THE  
DISTRICT GRANT APPLICATION  
ON THE  
DISTRICT 5150 WEBSITE?**



## Welcome to The Rotary District 5150 Website

Rotary is a worldwide network of inspired individuals who translate their passions into relevant social causes to change lives in communities.

Made up of over 35,000 Rotary clubs around the world, Rotary International forms a global network of business, professional, and community leaders who volunteer their time and talents to serve communities locally and around the world – and form strong, lasting friendships in the process.

# DISTRICT WEBSITE

The Rotary Foundation

Donate

The Rotary Foundation

End Polio Now

Global Scholars

Rotary Grants

Contribute

# DISTRICT WEBSITE

District/Global Grants

Grant Resources

District Grant Overview –  
2019-2020

Rose C Stone Donor Advised  
Fund (DAF) for Clubs



## **STEP 1 of the District Grant process: Welcome!**

You are now on your way to accessing available funding to do an amazing project or service during the 2020-2021 Rotary year. Carefully read this overview and then you'll be ready to move to Step 2.

In order for District 5150 to continue qualifying to receive grant funding from The Rotary Foundation (TRF), each Club must understand and comply with TRF's strict rules regarding the grant process. Those requirements are included in District 5150's District Grant application. [Click here for details about TRF's rules.](#)

As you read through the District Grant process, if you have questions or need assistance, please contact District Grants Coordinator Cyndy Simms at [districtgrants5150@gmail.com](mailto:districtgrants5150@gmail.com) or 909-544-9966.

Let's begin...

### **Where does District Grant funding come from?**

**District Designated Funds (DDF)** provide funding for District Grants and Global Grants. Each Club is allocated DDF annually by District 5150 based on the Club's prior 3 years of donations to The Rotary Foundation's (TRF) Annual Fund. Estimated DDF allocations for the coming Rotary year are sent to Club Presidents and President-Elects by the end of April each year.

## **STEP 2 of the District Grant process: Get Qualified before April 1**

- 1) The Club President-Elect must attend one of the Grants Management and Memorandum of Understanding (MOU) training sessions sponsored by District 5150 scheduled for January 11, 2020 or February 22, 2020.
- 2) One of the following Club leaders must also attend one of the Grants Management and Memorandum of Understanding (MOU) training sessions sponsored by District 5150:
  - a. President Nominee (preferable)
  - b. International Chair
  - c. Community Service Chair
  - d. The Rotary Foundation (TRF) Chair
- 3) The signatures of the President-Elect and President Nominee are required on The Rotary Foundation (TRF) Memorandum of Understanding (MOU) and the District 5150 MOU Addendum. If the Club does not have a President Nominee by April 1, one of the Chairs (2b, 2c, 2d) who attended the Grants Management and MOU training session may sign in lieu of the President Nominee. [Click here for copies of the TRF MOU and the District 5150 MOU.](#)



- 4) The President-Elect, President Nominee (or one of the Chairs (2b, 2c, 2d) and The Rotary Foundation (TRF) Chair must have taken and passed the Rotary Foundation Basics Course in RI's online Learning Center no later than March 21, 2020.
- 5) The Club President-Elect must enter goals into Rotary Club Central for The Rotary Foundation's Annual Fund no later than April 1, 2020
- 6) Qualification requirements must be completed by April 1, 2020 for the 2020-2021 Rotary Year and submitted to William Gilmore, District Stewardship Chair, at [wg-arch@outlook.com](mailto:wg-arch@outlook.com)
- 7) NOTE: You must complete **Step 2** before advancing to **Step 3**.

In addition, the Club must be:

- a. Current on Rotary International and District 5150 dues
- b. In good standing with Rotary International and the District including membership reporting and financial obligations
- c. Compliant with State and Federal Tax reporting requirements

### **STEP 3 of the District Grant process: Compete the District Grant Application before June 1, 2020**

- 1) Work with your Club or Board of Directors to determine DDF grant projects for your Club in 2020-2021.
- 2) Click on [District 5150 Grant application](#) and follow the directions to complete the application.
- 3) Allow enough time to complete the application and secure the signatures of the 2019-2020 President-Elect and 2019-2020 President Nominee before June 1.
- 4) Completed on-line applications will automatically be emailed to Cyndy Simms, District 5150 Grants Coordinator. Applications must be received by June 1, 2020.
- 5) Need help? Contact District Grants Coordinator Cyndy Simms at [districtgrants5150@gmail.com](mailto:districtgrants5150@gmail.com) or 909-544-9966.

Seems obvious, but all information in the District Grant application must be true and accurate.

## TIPS BEFORE YOU BEGIN...

- Review the application form
- Be sure you have the information required to complete the application
- If your Club applied for DDF funds last year, use a copy of last year's application as a guide
- Confirm your 2020-21 Club President's and President-Elect's approval

# Rotary District 5150 District Grant Application 2020-2021

Step 1 of 2: Submit



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, 2020. See District Grant Policy 2020-2021 ([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](mailto:districtgrants5150@gmail.com) or 909-544-9966. Thank you for applying!

**LEAD CLUB NAME \***

Foster City

**If Multi-Club Project, List Names of Supporting Clubs**

**PROJECT NAME \***

3rd Grade Dictionary Project

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

Distribute dictionaries to 3rd grade students at Audubon, Brewer Island, and Foster City elementary schools

**Start Date \***

2020-12-01



**Estimated Completion Date \***

2021-01-31

District Grants require active involvement of Rotarians to:

- \* Assess community needs
- \* Develop a project plan
- \* Establish a committee of 2+ Rotarians to oversee expenditure of funds and implementation of the project
- \* Promote the project in local media
- \* Submit required reports on time

**Number of Rotarians that will participate in this project? \***

20

**Describe active participation by Rotarians (non-financial). Provide at least two (2) examples of active participation. \***

Place Rotary labels in the front of each dictionary and distribute dictionaries to 3rd grade students

**Number of non-Rotarians that will benefit from this project? \***

400

**Who is the relevant community and how will the project improve their lives? \***

3rd grade students, their parents, and teachers will see students using improved dictionary skills

**What are the expected long-term community impacts? \***

Students will be better writers, spellers, and readers



Is this a Dictionary Project? \*

☒ Yes

☐ No

If yes, how many dictionaries will be distributed?

Is this a RYLA Project? \*

☐ Yes

☒ No

If yes, how many students will be sponsored?

Will the project address any of the 6 Areas of Focus? If YES, which Area(s)? \*

☐ No

☐ Peace and Conflict Prevention/Resolution

☐ Disease Prevention and Treatment

☐ Water and Sanitation

☐ Maternal and Child Health

☒ Basic Education and Literacy

☐ Economic and Community Development

**How will the project meet the goals of that Area of Focus? \***

Students will become better writers, spellers, and readers

**Describe how the general public will know that this is a Rotary-sponsored project? Provide examples. \***

Articles in the Islander newspaper and school district newsletters

**Is a cooperating organization involved in the project? \***

☒ Yes

☐ No

**If YES, what is the name of the organization(s) and what role does it play in the project?**

San Mateo-Foster City School District gives approval for the dictionary project

**CLUB PRIMARY CONTACT NAME \***

Rich Mozzini

**Club Primary Contact Rotary Position \***

Dictionary Project chairperson

**Club Primary Contact Email Address \***

rmozzini@sanbrunocable.com

**Club Primary Contact Phone Number \***

650-555-5555

**CLUB SECONDARY CONTACT NAME \***

Mary Lou Griffin

**Club Secondary Contact Rotary Position \***

Club President 2020-2021

**Club Secondary Contact Email Address \***

marylougriffin1@yahoo.com

**Club Secondary Contact Phone Number \***

650-555-5555

# ITEMIZED BUDGET

The ITEMIZED BUDGET must specify INCOME (District Grant funds - DDF, Club funds, other funds) and EXPENDITURES (costs of equipment, furniture items, gasoline, meals, lodging, training, number of dictionaries, etc.). Supporting documentation may be requested. Receipts are required for the Final Report.

## INCOME

DISTRICT GRANT FUNDS (DDF) REQUESTED UP TO \$\_\_\_\_\_OF DDF AVAILABLE \*

Club Funds

Other Funds - please specify source

TOTAL PROJECT INCOME \*

# EXPENDITURES

EXPECTED EXPENDITURES - provide specific costs \*

400 dictionaries x \$10.75 each

TOTAL PROJECT EXPENDITURES \*

4300

If your Club does not receive the entire amount of DDF requested, can your Club fund the shortfall from its own funds? \*

☒ Yes

☐ No

If NO, can the project be downsized to meet the amount of the District Grant and Club contribution to the project?

☐ Yes

☐ No

## REQUIRED AUTHORIZATION

As President of this Rotary Club for 2020-2021, I affirm that the Club has voted to undertake this project as an activity of the Club.

### 2020-2021 PRESIDENT NAME \*

Mary Lou Griffin

### Signature \*

Date: Monday, 6 January 2020 (EST)

Name:

Mary Lou Griffin

### Date \*

2020-03-15

### 2021-2022 PRESIDENT NAME (2020-2021 PRESIDENT-ELECT) \*

Curtis Chen

### Signature \*

Date: Monday, 6 January 2020 (EST)

Name:

Curtis Chen



Date \*

2020-03-16

ALTERNATE NAME (if 2020-2021 President-Elect is unknown)

ALTERNATE ROTARY POSITION

- ☐ Club Rotary Foundation (TRF) Chair
- ☐ Community Service Chair
- ☐ International Service Chair

Signature

Date: Monday, 6 January 2020 (EST)

Name:

Date

CONTINUE →

\* indicates required fields

# Rotary District 5150 District Grant Application 2020-2021

Step 2 of 2: Confirm



 If the information below is correct, press Confirm to complete your form submission. Otherwise, press Modify.

← MODIFY

CONFIRM →

LEAD CLUB NAME

Foster City

If Multi-Club Project, List Names of Supporting Clubs

PROJECT NAME

3rd Grade Dictionary Project

Briefly describe the project and what the project will do.

Distribute dictionaries to 3rd grade students at Audubon, Brewer Island, and Foster City elementary schools

Start Date

Tuesday December 01, 2020

Estimated Completion Date

Sunday January 31, 2021

Number of Rotarians that will participate in this project?

20

Describe active participation by Rotarians (non-financial). Provide at least two (2) examples of active participation.

Place labels in the front of the dictionaries and distribute the dictionaries to 3rd grade students

<b>Number of non-Rotarians that will benefit from this project?</b>	400
<b>Who is the relevant community and how will the project improve their lives?</b>	3rd grade students, their parents, and teachers will see students using improved writing and spelling skills
<b>What are the expected long-term community impacts?</b>	Students will be better writers, spellers, and reader
<b>Yes</b>	yes
<b>No</b>	no
<b>If yes, how many dictionaries will be distributed?</b>	400
<b>Yes</b>	no
<b>No</b>	yes
<b>If yes, how many students will be sponsored?</b>	
<b>No</b>	no
<b>Peace and Conflict Prevention/Resolution</b>	no
<b>Disease Prevention and Treatment</b>	no
<b>Water and Sanitation</b>	no
<b>Maternal and Child Health</b>	no

<b>Basic Education and Literacy</b>	yes
<b>Economic and Community Development</b>	no
<b>How will the project meet the goals of that Area of Focus?</b>	Students will become better writers, spellers, and readers
<b>Describe how the general public will know that this is a Rotary-sponsored project? Provide examples.</b>	Articles in the Islander newspaper and in the school district newsletters
<b>Yes</b>	yes
<b>No</b>	no
<b>If YES, what is the name of the organization(s) and what role does it play in the project?</b>	San Mateo-Foster City School District gives approval to distribute the dictionaries
<b>CLUB PRIMARY CONTACT NAME</b>	Rich Mozinni
<b>Club Primary Contact Rotary Position</b>	Dictionary Project chairperson
<b>Club Primary Contact Email Address</b>	rmozzini@sanbrunocable.com
<b>Club Primary Contact Phone Number</b>	650--555-5555
<b>CLUB SECONDARY CONTACT NAME</b>	Mary Lou Griffin
<b>Club Secondary Contact Rotary Position</b>	Club President 2020-21
<b>Club Secondary Contact Email Address</b>	marylougriffin1@yahoo.com

DISTRICT GRANT FUNDS (DDF) REQUESTED UP TO  
\$\_\_\_\_\_OF DDF AVAILABLE

4300

Club Funds

0

Other Funds - please specify source

0

TOTAL PROJECT INCOME

4300

EXPECTED EXPENDITURES - provide specific costs

400 dictionaries x \$10.75 each

TOTAL PROJECT EXPENDITURES

4300

Yes

yes

No

no

Yes

no

No

no

2020-2021 PRESIDENT NAME

Mary Lou Griffin

Signature

Mary Lou Griffin

Date

Tuesday January 07, 2020

2021-2022 PRESIDENT NAME (2020-2021 PRESIDENT-ELECT)

Curtis Chen

Signature

Curtis Chen

Date

Tuesday January 07, 2020

ALTERNATE NAME (if 2020-2021 President-Elect is unknown)

Club Rotary Foundation (TRF) Chair

no

Community Service Chair

no

International Service Chair

no

Signature

Date

← MODIFY

CONFIRM →



**WAIT...**

***BEFORE* YOU HIT “CONFIRM”,**

***MAKE A COPY* FOR YOUR FILES**

# Rotary District 5150 District Grant Application 2020-2021

---

Thank You



The form was submitted successfully. Thank you.

Reference number: **1D3WMDAF1DYPDFFYVJCBR2PEY**

---

[Privacy Policy](#)

Web form by **FormSmarts**

## STEP 4 of the District Grant process: Implement your Project!

Once your District Grant application is approved, you are ready to implement your project. **Do not begin** implementation of your project **until you have received written notification** from District Grants Coordinator Cyndy Simms that the application has been approved by the District 5150 Grants Committee and The Rotary Foundation. Notification usually occurs by September 1. Remember:

- The Club must maintain a separate bank account for each District Grant over \$2,000.

## **STEP 5 of the District Grant process: Final/Interim Report due by May 1, 2021.**

Once your project is finished, complete your Final/Interim Report online at [District Grant Final Report](#) on the District 5150 website.

- 1) The Final/Interim Report is due no later than May 1, 2021.
- 2) It is a good idea to complete the Final Report as soon as the project is finished. The Final Report can be submitted anytime prior to May 1, 2021.
- 3) If your project covers more than one Rotary Year (July 1<sup>st</sup> to June 30<sup>th</sup>), you must file an Interim Report for the first year of the project.
- 4) All District Grant projects must be completed by April 30 of the second Rotary Year of the project.
- 5) If the project spans a second Rotary Year, the Final Report must be submitted by May 1, 2022.

## **STEP 5 of the District Grant process: Final/Interim Report due by May 1, 2021.**

Once your project is finished, complete your Final/Interim Report online at [District Grant Final Report](#) on the District 5150 website.

- 1) The Final/Interim Report is due no later than May 1, 2021.
- 2) It is a good idea to complete the Final Report as soon as the project is finished. The Final Report can be submitted anytime prior to May 1, 2021.
- 3) If your project covers more than one Rotary Year (July 1<sup>st</sup> to June 30<sup>th</sup>), you must file an Interim Report for the first year of the project.
- 4) All District Grant projects must be completed by April 30 of the second Rotary Year of the project.
- 5) If the project spans a second Rotary Year, the Final Report must be submitted by May 1, 2022.

# REMEMBER...

- **THE FINAL/INTERIM REPORT MUST INCLUDE RECEIPTS FOR THE PROJECT'S COSTS**

**~AND~**

- **SIGNATURES FROM BOTH THE 2020-2021 PRESIDENT AND PRESIDENT-ELECT**



# REMINDER!

**2019-2020**  
**FINAL REPORT DUE**  
**MAY 1, 2020**

# QUESTIONS?

Contact District Grants Coordinator  
**Cyndy Simms**

[districtgrants5150@gmail.com](mailto:districtgrants5150@gmail.com)

909-544-9966



People with Passion,  
People of Action,  
can change the world



Photos © Rotary International



# GRANT MANAGEMENT TRAINING for 2020-21

Congratulations!



Thank You!