

District Conference 2017:

District Grants and Global Grants

DISTRICT GRANTS

- How does my club request a District Grant?
- How much can we get?
- How can we use the Grant?
- When is the application due?
- How does our District Grant get approved?
- What do you do once you get the money?
- What is the reporting requirement?

DISTRICT GRANTS – APPLICATION PROCESS

- All Club President-Elects were emailed the District Grant application on March 24th, and again on April 30th.
- The application is a short fillable .pdf form that can be completed in a few minutes
- Fill in the blanks, save, and email back to the Grants committee -- grants@rotary6450.net

How much can we get in our Grant?



For 2017-18, each Club is eligible for an allocation based on the Club members' contributions to The Rotary Foundation in the 2014-15 Rotary fiscal year.

≤ 50%
District Grants
\$70,000

Club	2014-15 Contributions	2017-18 Allocation
Joliet	\$18,705	\$3,741
Lisle	\$3,000	\$750
Kankakee	\$2,755	\$688
Chicago Northwest	\$1,500	\$375
Lansing	\$2,200	\$550

How can we use the District Grant?

District grants are block grants to districts that fund scholarships, projects, and travel that align with the mission of The Rotary Foundation, which is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

There must be active Rotarian involvement in the project.

Grant money must be matched (or exceeded) by Club spending on the Project.

How can we use the District Grant?

EXAMPLES OF PERMITTED GRANTS:

Scholarships	Dictionary Projects
Travel for Vocational Training Teams	Holiday meals and holiday gift projects
Authors in the School projects	Playground repairs
Veterans projects	Backpack projects
Rotary Youth Exchange	RYLA
Spent locally	Spent internationally

How can we use the District Grant?



How can we use the District Grant?



How can we use the District Grant?



How can we NOT use the District Grant?

EXAMPLES OF UNPERMITTED REQUESTS:

“Check-writing” to projects run by non-Rotary organizations that do not include the active participation of Rotarians

Club social events or membership activities / Feeding Rotarians

Rotary promotional materials (shirts, bags, etc.) or PR activities

Salaries, administrative, or operating expenses for the Club or another group

Establishment of another fund - your allocation must be used completely on the project or the funds returned to the District

Activities for which the expense has already been incurred, e.g., a project that is already completed

How else can we use the District Grant?

Your Club can choose to have its allocation, in whole or in any part, donated to PolioPlus by the District, IF your Club also donates the same amount to PolioPlus in 2017-18.



**Club 1:1
contribution**

**Matched by TRF and
Gates Foundation**

How else can we use the District Grant?

Your Club can choose to have its allocation apply to a Global Grant that your Club submits in 2017-18. The whole allocation must be used this way. The allocation will be added to the funding of the Global Grant as additional DDF.



May be used for a global grant
100% allocation required

When are the important dates?

March 24



PE's receive
application
via email

- *Emailed to Club President-elects*
- *Club specific application*

May 12



Applications
are due

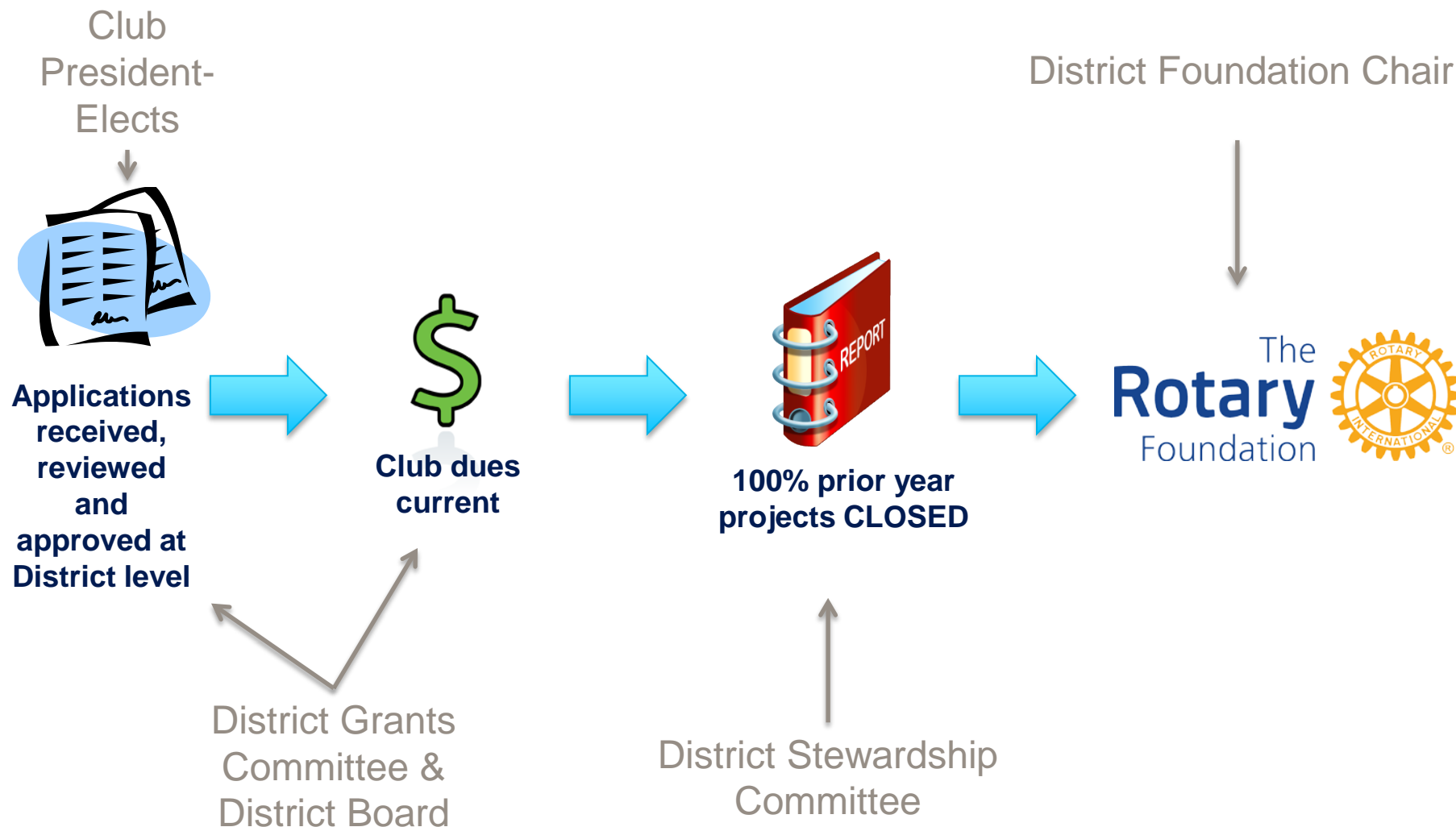
- *MUST be in the form provided*
- *Use it or lose it – please USE it*

June 3



Grants Committee
reviews and
approves the
applications

How does it get approved?



Any other requirements of our Club?

- Clubs must be in good standing with the District and with Rotary International
- Rotary and District dues must be paid
- All final reports for his year's District Grants must be submitted and complete
- All interim or final reports for Global Grants must be submitted to The Rotary Foundation
- Clubs must have submitted their Goal for Annual Giving to the Rotary Foundation for this year and for 2017-18

What do you do once you get the money?

- **Implement your project!**



- Get Rotarians engaged

- Take lots of photos and videos



- Tell everyone about your good works through social media

- Save your receipts and proof of payments



- Complete the final project report when the project is complete



What do we need for the Final Report?

- A completed Final Report form, which will be provided to you by the Grants Committee
- Receipts or cancelled checks for all of the project expenses
- Submit it on time, which is generally about a month after the date your project is to be completed, which is the date you provide to the Grants Committee
- For multiple small expenses, please add a summary sheet

What are the Top Ten mistakes made by Clubs?

1. Fail to submit the Final Report on Time
2. Submit illegible documents (pencil, red pen, etc.)
3. Fail to spend Club match of the grant amount
4. Fail to say how many non-Rotarians benefitted
5. Fail to say how Rotarians were involved and how many
6. Submit receipts from the wrong year
7. Proof of Purchase – front of check is not enough
8. Proof of Purchase – an invoice is not enough
9. Proof of Purchase – a pledge to order dictionaries is not enough
10. For credit cards slips – must show “balance due = 0”

GLOBAL GRANTS

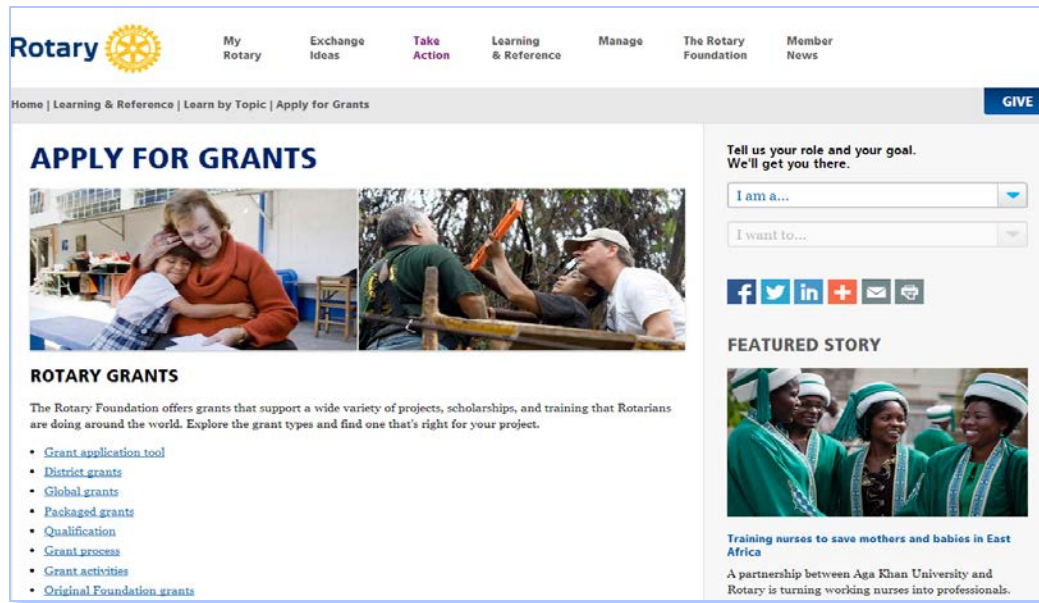
- How does my club start a Global Grant?
- How does the application process work?
- How can we use the Grant?
- How much can we get?
- When is the application due?
- How does our Global Grant get approved?
- What is the reporting requirement?

GLOBAL GRANTS – Getting Started

- The Rotary Foundations requires partnership between at least two clubs in different countries, the Host Club and the International Club. The Host Club is where the project is done. Most times our clubs are the International Club.
- Our District requires a sponsoring club to have at least two other District clubs participate in the Global Grant in some way, including financially, and three other clubs if the budget is over \$100,000.
- Work with the Grants Committee for preparation and approval of the grant before it is submitted to the Rotary Foundation.
- Use the District Global Grants Checklist as a guide.

GLOBAL GRANT APPLICATION

- Applications are submitted online:
www.rotary.org/grants
- There are no application deadlines – either by Rotary Foundation or by District 6450



The screenshot shows the Rotary Grants application page. At the top is the Rotary logo and a navigation bar with links: My Rotary, Exchange Ideas, Take Action, Learning & Reference, Manage, The Rotary Foundation, and Member News. Below the navigation bar is a header with the text "Home | Learning & Reference | Learn by Topic | Apply for Grants" and a "GIVE" button. The main content area is titled "APPLY FOR GRANTS" and features two images: a woman holding a child and a group of people working on a project. Below the images is the "ROTARY GRANTS" section, which includes a paragraph about the Rotary Foundation's grants and a list of links: Grant application tool, District grants, Global grants, Packaged grants, Qualification, Grant process, Grant activities, and Original Foundation grants. To the right of the main content is a sidebar with a form titled "Tell us your role and your goal. We'll get you there." with two dropdown menus: "I am a..." and "I want to...". Below the form are social media icons for Facebook, Twitter, LinkedIn, YouTube, and Email. The sidebar also features a "FEATURED STORY" section with a photo of three women in green uniforms and a caption: "Training nurses to save mothers and babies in East Africa. A partnership between Aga Khan University and Rotary is turning working nurses into professionals."

#1 NEEDS ASSESSMENT

- Start with a needs assessment rather than project plan
- Conduct a thorough assessment of community needs and strengths
- Talk to community members directly or with host club
- Rotary's Community Assessment guide has options



COMMUNITY ASSESSMENT TOOLS

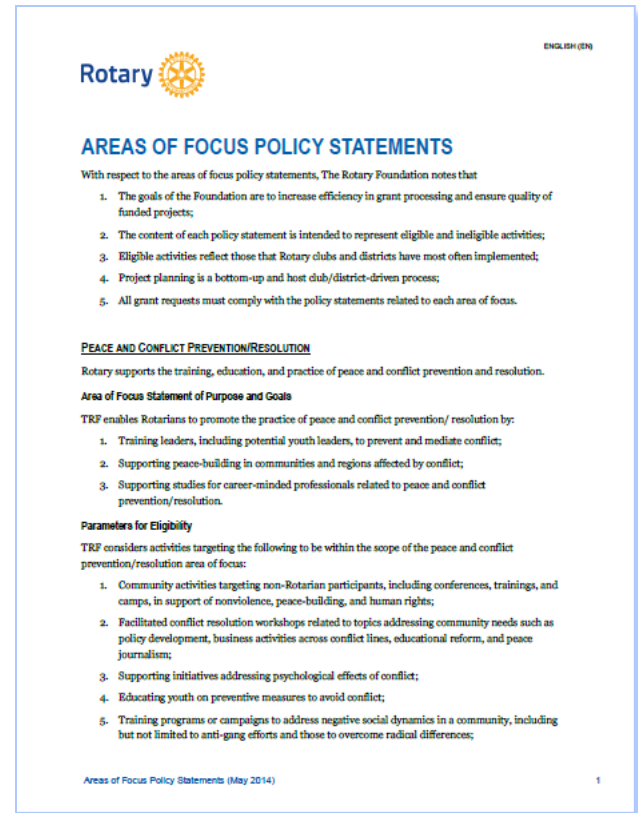
*A Companion Piece to Communities in Action:
A Guide to Effective Projects (605A)*



ROTARY INTERNATIONAL

#2 AREA OF FOCUS

- Review areas of focus policy statements
- Identify most appropriate area of focus based on needs assessment
- Design project based on identified area of focus
- Ensure that all project activities relate to the area of focus goals



#3 DETAILED PROJECT PLAN

- Provide detailed project implementation plan
- Involve beneficiaries in project design



#4 ROTARIAN INVOLVEMENT

- Provide a detailed list of tasks for host and international Rotarians



#5 BUDGET

- Provide a detailed budget
- Include vendor information and explain how vendors were selected

Objectives	Areas of Focus	Participants	Budget	Financing	DRFC Authorizations	Authorizations
------------	----------------	--------------	--------	-----------	---------------------	----------------

? Click "Save & Exit" at the bottom of any tab to save your progress and return to the application later.

BUDGET

Select the local currency for your budget and enter the current rate of exchange to 1 U.S. dollar. Obtain the current RI exchange rate from Rotary's website. If your country is not on the official RI exchange rates list, visit the Oanda or Bloomberg website to obtain the current rate.

Detail your proposed expenses by adding items to the budget. Note that the total budget must be equal to the total financing of your activity.

Local currency: USD Exchange rate to 1 USD: 1 [Change](#)

No.	Description	Supplier	Category	Local cost (USD)	Cost in USD
Add Budget Item				Total budget:	0
Export to Excel					0

SUPPORTING BUDGET DOCUMENTS

Upload any documents, such as price bids or pro forma invoices, to support the expenses listed.

After selecting the document you wish to upload, click "Save" to view the uploaded file on this page.

Resources

- [Grant Terms and Conditions](#)
- [Grant Management Manual](#)
- [RI Exchange Rates](#)
- [Oanda Currency Converter](#)
- [Bloomberg Currency Conversion](#)

#5 BUDGET – Part 2

- Minimum Project Budget is \$30,000
- Minimum Rotary Foundation World Fund match is \$15,000
- The World Fund matches Rotarian and non-Rotarian cash contributions 50%, and matches District DDF 100%
- District 6450 matches Club cash contributions dollar for dollar up to \$10,000 for most grants, \$12,000 for grants over \$100,000

#6 SUSTAINABILITY

- Clearly explain specific sustainability components

ENGLISH (EN)

SIX STEPS TO SUSTAINABILITY

Sustainability means different things to different organizations. For Rotary, sustainability means providing long-term solutions to community needs that the beneficiaries can maintain after grant funding ends. Here are six steps that can make your project sustainable:

- 1) Assess community needs**
Have local sponsors conduct a thorough assessment to identify a community need that the sponsors can address in a way that fits beneficiaries' values and culture. Involve multiple community partners in the planning process.
- 2) Use local materials**
Purchase equipment and technology from local sources when possible. Be sure that spare parts are readily available. Involve community members in the selection of technology and equipment, and train them to operate, maintain, and repair it on their own.
- 3) Identify a local funding source**
Confirm the existence of a local funding source to support a project's long-term operation, maintenance and repair. Compensate the project's suppliers and vendors appropriately so they will have an incentive to continue providing services.
- 4) Provide training, education, and outreach**
By providing training, education, and community outreach you will strengthen beneficiaries' ability to meet project objectives. Confirm that there is a plan in place to transfer knowledge to new beneficiaries. Collaborate with local agencies and organizations to supply needed expertise.
- 5) Motivate beneficiaries to take ownership**
Provide incentives for beneficiaries and project participants to continue their support. Identify individuals willing to lead beneficiaries in sustaining project outcomes. Prepare the community to assume ownership of the project once grant funds are expended.
- 6) Monitor and evaluate**
Develop clear and measurable project objectives, and identify methods for collecting project data. Establish baseline data that can be used to demonstrate significant change for at least three years.

Six Steps to Sustainability (July 2014)1


#7 TRAINING INFORMATION

- Include detailed information for each training opportunity
 - Frequency
 - Curriculum
 - Target audience
 - Trainer



#8 COOPERATING ORGANIZATION MOU

- Include MOUs for each cooperating organization

Rotary

ENGLISH (EN)

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.

3. PRIMARY CONTACTS

	HOST PARTNER	INTERNATIONAL PARTNER	COOPERATING ORGANIZATION
Name	[NAME]	[NAME]	[NAME]
Address	[ADDRESS]	[ADDRESS]	[ADDRESS]
Phone	[PHONE]	[PHONE]	[PHONE]
Email	[EMAIL]	[EMAIL]	[EMAIL]

Cooperating Organization Memorandum of Understanding (April 2014)

1

#9 MEASUREMENT AND EVALUATION

- Include specific information related to measurement and evaluation

Economic and community development

Which goals will your activity support?

☒ Building the capacity of entrepreneurs, community leaders, local organizations, and community networks to support economic development in impoverished communities

☐ Developing opportunities for productive work

☐ Reducing poverty in underserved communities

☐ Supporting studies for career-minded professionals related to economic and community development

How will you meet these goals?

How will you measure your impact?

Note that global grant sponsors of approved applications will be expected to account for the total number of direct beneficiaries in the final report.

No.	Measure	Measurement Method	Measurement Schedule	Target
Add Measure				

Who will be responsible for collecting information for monitoring and evaluation?

Rotary  ENGLISH (EN)

GLOBAL GRANT MONITORING AND EVALUATION PLAN SUPPLEMENT

Global grant sponsors for humanitarian projects and vocational training teams must submit a monitoring and evaluation plan with their grant application. This supplement contains The Rotary Foundation 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 results.

*Add only measures that clearly link to specific goals and will demonstrate the project's impact on participants' lives, knowledge, or health.

Note: On the following pages, Rotary Foundation standard terms used in measures are shown in **bold**; definitions are listed in the glossary.

Global Grant Monitoring and Evaluation Plan Supplement (July 2014) 1

#10 COMPLETE APPLICATION

- Complete the entire application!
- Once submitted, be prepared to answer any questions the grant reviewer poses as thoroughly as possible

#11 After Approval

- Approval of the Global Grant is just the start.
- After that:
 - Collect all of the funds committed by other Clubs
 - Either to the Rotary Foundation (5% admin fee) or directly into your Club's separate account for the Global Grant
 - Implement the Project
 - Inform your partners of progress regularly
 - Prepare and submit formal reports to Rotary

#12 Reporting to Rotary

- The Rotary Foundation requires that a report be submitted online for your Global Grant one year after you receive the grant money from the Foundation
- If the project is complete, that is the Final Report. If it is still ongoing, it is an Interim Report.
- Until the project is complete, an Interim Report is required to be filed each year.
- Failure to file a required Report jeopardizes the ability of your Club and the District to participate in future Global Grants!

RESOURCES

- my.rotary.org/en/take-action/apply-grants/global-grants
- A Guide to Global Grants
- Online application process aide
- District 6450 Website Grants page
- Grants staff
- District Grants Committee
 - Rachel Ossyra, Chair
 - rachelmarieo@hotmail.com

