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?

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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

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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.

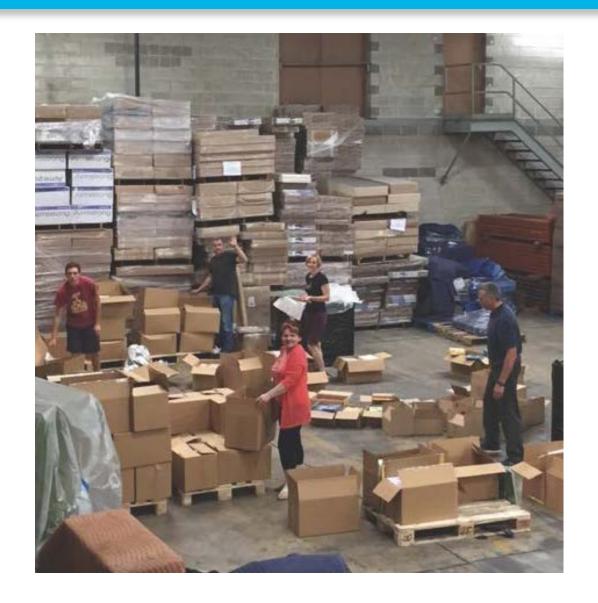Grant money must be matched (or exceeded) by Club spending on the Project.

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

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How can we use the District Grant?

How can we use the District Grant?

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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

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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	May 12	June 3

PE's receive application via email

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

Applications are due

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

Grants Committee reviews and approves the applications

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How does it get approved?

Club President-Elects

Applications received, reviewed and approved at District level

District Grants Committee & District Board

Club dues current

100% prior year projects CLOSED

District Stewardship Committee

District Foundation Chair

The Rotary Foundation

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

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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

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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?

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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

- 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

#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

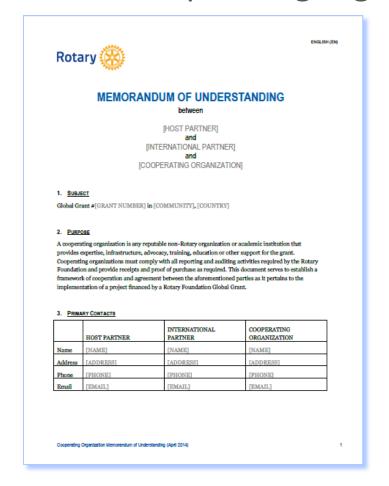- Clearly explain specific sustainability components

#7 TRAINING INFORMATION

- Include detailed information for each training opportunity

  - Frequency

  - Curriculum

  - Target audience
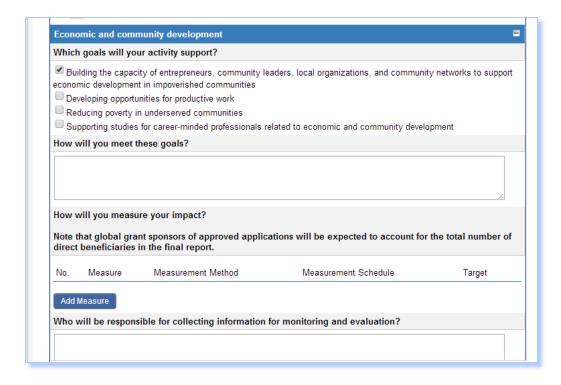
  - Trainer

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- Include MOUs for each cooperating organization

#9 MEASUREMENT AND EVALUATION

- Include specific information related to measurement and evaluation

#10 COMPLETE APPLICATION

- Complete the entire application!

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

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#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!

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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

A GUIDE TO GLOBAL GRANTS