



# Global Grant Management Seminar

District 6220 and 6270



“The mission of the Rotary Foundation 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”

# Overview of Session

- What is a Global Grant (GG)?
- What are District Designated Funds (DDF)?
- What a Club must do to qualify?
- Types of Project – Areas of focus
- Project Planning
- What is the process?
- Available resources
- Lessons Learned - Coming Developments

# Glossary – Rotary Shorthand

- DDF = District Designated Funds
- GG and DG = Grant types (Global and District)
- MOU = Memorandum of Understanding
- NGO's = Non-Governmental Organizations
- TRF= The Rotary Foundation
- VTT = Vocational Training Team
- WF = Rotary International World Fund
- DRFC = District Rotary Foundation Chair

# What types of Global Grants are available?

## **Humanitarian Projects**

- Budget, minimum \$30,000,
- WF match, minimum \$15,000, max \$200,000

## **VTT or Vocational Training Teams**

- Budget, minimum \$30,000, using DDF and WF

## **Scholars**

- Budget, minimum \$30,000 using DDF and WF

*District 6270 has funded VTT and a Scholarship in alternate years, depending on available funds. District 6220 has funded Scholarships in 4 of the last 5 years.*

# What are District Designated Funds (DDF)?

Annual DDF consists of one half of the funds donated to TRF by District Clubs and individuals during the fourth previous fiscal year.

- This is source of funds for DG and GG in the current fiscal year.
- At the end of each 3-year period, one half of that amount goes to the District. The other one half goes to the WF. Referred to as “Shared” funds.
- Historically, TRF used income from its funds to support its operations

- In 2014, TRF determined this investment income was not sufficient to cover operating costs
- TRF created a reserve fund those years when the investment return does not cover operating expenses
- Effective July 1, 2015, Global Grant awards have been required to fund that reserve with
  - 5% of cash contributions to TRF
  - covers costs associated with processing GG funds

# District 6270 DDF Budget (2019-20)



# District 6220 DDF Budget (2019-20)

• DDF Awarded (based on 2016 contrib.)	\$ 62,421
• DDF Carried Forward (prior unspent)	137,247
• Estimated DDF from Endowment	1,496
• Additional District Grant funds (per Trustee decision)	12,586
• Matching Grant 2013-Club Funds (not spent)	4,413
• 2019-20 District Grants	-44,545
• 2019-20 Global Grants	-173,618

# To Qualify for a Global Grant

- For **District 6220**, one Club Rotarian must attend, **each** year, a District hosted Global Grant Management Seminar.
- For **District 6270**, at least two Club Rotarians must attend, **each** year, a District hosted Global Grant Management Seminar.
- Must enter into a MOU (valid for **one** year)
  - Imposes significant responsibility on Sponsoring Club
  - Including responsibility for use funds regardless of who controls them

# Qualifying for a Global Grant Cont'd

- Appoint a member/committee to implement, manage and maintain club qualification
- Maintain a written financial management plan, including accounts and records for items purchased, produced or distributed;
- Assure that all grant activities comply with local law
- Adhere to specific bank account requirements
- Adhere to all TRF reporting requirements
- Cooperate in any TRF reviews or audits
- Report to the District any potential or actual misuse or mismanagement of grant funds

# TRF Six Areas of Focus



- Peace and conflict prevention/resolution



- Disease prevention and treatment



- Water and sanitation



- Maternal and child health



- Basic education and literacy



- Economic and community development

*See Rotary's Areas of Focus Policy Statements for more detail*

# Recent TRF Changes in Global Grants

- Global Grants can now include:
  - Constructing low cost shelters
  - Constructing simple schools (2-3 classrooms)
- Guidelines for each, with sample Applications, are posted on the Rotary Foundation Website, [grants.rotary.org](https://grants.rotary.org)

# Project Planning

- Locate and identify a ***Host*** Rotary Club within one of the Areas of Focus
- Conduct a Community Needs Assessment
- Identify who will implement the project
- Determine funding sources

# Community Needs Assessment

- “The process of doing the assessment helps you build valuable relationships and encourages community members to participate in making and maintaining improvements”
- Must be conducted **with** the *Host* club
- See: Community Assessment Tools  
(located – [my.rotary.org/en/document/community-assessment-tools](https://my.rotary.org/en/document/community-assessment-tools) )

# Community Assessment Tips

- Tips for Community Assessment Tools:
  - Conducting the Assessment
  - Hosting a Community Meeting
  - Designing a good Survey
  - Designing and conducting a good Interview
  - Conducting a Focus Group
- Results of Community Needs Assessment must be included in application for Global Grant



# Guide to Global Grants

## SUSTAINABILITY

For Rotary, sustainability means providing long-term solutions to community problems that community members themselves can support after the grant funding ends.



### Start with the community

Identify a need and develop a solution that builds on community strengths and aligns with local values and culture.



### Encourage local ownership

Identify key community members who can help pioneer lasting improvements.



### Provide training

A project's success depends on people.



### Buy local

Purchase equipment and technology from local sources.



### Find local funding

Get local funding through governments, hospitals, companies, and other organizations.



### Measure your success

Develop clear and measurable project outcomes and determine how you will collect your data.



# Additional Project Planning

- Develop a realistic budget for project
- Create a financial management plan
- Develop a project management timeline
- Create a document retention plan: a minimum of 7 years
- Create a contingency plan – not required but urged

# Financial Management Plan

- Separate bank account, no co-mingling of funds
- Accounting must track all income and expenses
- Need paper trail – invoices, receipts, checks, credit card statements (make copies, as some receipt ink fades)

# Leverage Provided by Global Grant Funding

- DDF for a GG is matched 100% by WF
- Cash contributions from Rotary Clubs are matched 50% by WF
- Non-Rotarian cash contributions can be matched if the donation is made through a Rotary Club, but do not get Paul Harris recognition
- Funds cannot come from other Rotary grants

# Sample Global Grant Budget

Project budget \$40,000

Club(s) (at least 20%) \$ 8,889\*

WF 50% 4,445

DDF 1/3 13,333

WF 100% match 13,333

\* 5% administrative fee

# Global Grant Calculator

Proposed Financing	GG application #	Country:			
Please list all financing and indicate Cash or District Designated Fund (DDF) amounts.					
Host Rotary Clubs/Districts	US\$ Cash Direct to Project	US\$ Cash to TRF + 5%		US\$ DDF	
		Cash to TRF	5%		
Rotary Club of ABC		\$ 5,000	\$ 250		
Rotary Club of DEF	\$ 5,000	\$ -			
District 1234		\$ -		\$ 500	
		\$ -			
		\$ -			
		\$ -			
Total Host Contributions				\$ 10,500	41%
International Rotary Clubs/Districts	US\$ Cash Direct to Project	US\$ Cash to TRF + 5%		US\$ DDF	
		Cash to TRF	5%		
Rotary Club of XYZ		\$ 10,000	\$ 500		
District 5678		\$ -		\$ 5,000	
		\$ -			
		\$ -			
Total International Contributions				\$ 15,000	59%*
Total Contributions	\$ 5,000	\$ 15,000		\$ 5,500	\$ 25,500 100%
Total 5% for cash sent to TRF			\$ 750		
World Fund match (50% Cash, 100% DDF)	2,500	7,500		\$ 5,500	15,500**
Total Global Grant Funding					\$ 41,000
Funding from other sources***					
Total Project Funding (must be equal to budget)					\$ 41,000
Total cash to TRF + 5%		\$	15,750		
Ensure that all figures are whole numbers					
Contributions from the international partner must be a minimum of 30%.					
* Minimum World Fund match is \$15,000. Maximum World Fund match is \$200,000.					
**					
*** Please identify the source(s) of other funding. Note that outside funding added here is not matched by TRF. The Foundation will match non-Rotarian contributions provided they do not come from a cooperating organization or a beneficiary of the project. Contributions eligible for a match should be added in the section above.					

# Process for Global Grant Application

- If requesting DDF, go to District website and download the Preliminary Project Information Sheet
- Complete that form and submit it to the District Global Grant Committee Chair
  - District 6220: Steve Handrick, [sghRotary@gmail.com](mailto:sghRotary@gmail.com)
  - District 6270: John Hein, [jhein@dkattorneys.com](mailto:jhein@dkattorneys.com)
- District GG committee will evaluate, give recommendations and authorize use of DDF.
- District GG committee members are here to help and guide.

# Global Grant Preliminary Project Info Sheet

1.	Did two or more people from your club participate in this year's Grant Management Seminar? ___ Yes, ___ No If no, stop here, this club cannot submit a grant application.
2.	Name of Project and description? (Provide details.)
3.	Has a needs assessment been done? By whom? Date completed?
4.	Does the project fit an RI area of focus? What is it?
5.	Name of Host club & District (location?): Host club funding amount pledged?
6.	Anticipated total cost of project?



# PPIS (cont.)

7.	Preliminary Budget:
8.	How much DDF is being requested?
9.	Partnering clubs and potential partners for this project:
10.	How many Rotarians (number) will be involved? What will Rotarians do?
11.	How will this project be sustainable?
12.	Name of Contact on this project: Email address: Phone number with area code:

## Process for Application (cont.)

- If the DGGC authorizes use of DDF, it will ask the District Governor and the District Rotary Foundation Chair to approve the allocation of DDF.
- Complete the on-line application on the TRF website to get a GG Project Number.
- TRF staff will review the project in detail. If it meets “The Terms and Conditions” for Global Grants, they will recommend acceptance and funding approval for the project.

# Introducing - “We CAN Do Better” Video

“We CAN Do Better”

# Resources -- where to find or get help

- District websites
  - Global Grant Review Procedure
  - District MOU
  - Preliminary Project Information Sheet
  - Committee Chair and/or members
- Rotary website [grants.rotary.org](https://grants.rotary.org)
  - Terms and Conditions for Rotary Foundation
  - A Guide to Global Grants
  - Areas of Focus Policy Statements
  - Community Assessment Tools

# Partners -- Options

- Rotary Clubs – in and out of district
- Other community-based organizations
- NGO's
- Check [my.rotary.org](http://my.rotary.org)
  - Showcase
  - Idea exchange
  - Grants
  - District Showcase
- Social media – LinkedIn/Facebook/other sites

# Lessons Learned

Guatemala Bridge Project-economic development

Guatemala Water/Sanitation Project

Kyrgyzstan Medical Access Project and VTT

Guatemala \$100,000 Water System

Haiti Micro Loan Project

# Coming Developments

Assessment of Outcomes and Impact

Stewardship Oversight

COVID-19

Actions of Scale Grants



Questions?

Thank you