

GRANT MANAGEMENT SEMINAR

District 6220

April 4, 2020

Jack Frost, Chair - District Foundation

Sally Davis, Chair - District Grants

Nancy Loberger, Chair - District Project Fund



Housekeeping

- ▣ You are on mute
- ▣ Ask questions via the chat room
- ▣ Sign and return an MOU
- ▣ ..and a little etiquette for Zoom meetings



Purpose of Session

- ▣ Meet one of the prerequisites
- ▣ Review types of grants
- ▣ Review prerequisites and requirements
- ▣ Convince you to submit a grant
- ▣ Confirm donations to the Foundation

Will your club have a share of the \$44,545 pool of District Grant money? Or the pool of \$26,020 District Project Fund money?*

* 2019/2020 RY Funds

Why Pursue a ROTARY GRANT

- ❖ Leverage club's funding
- ❖ Partner with other organizations
 - ❖ Additional leverage
- ❖ Enhance club's impact
- ❖ Increase visibility and image



Rotary Grants

District Project Funds

District Grant

Global Funds

Humanitarian Projects

Vocational Training Teams

Global Scholarships

Rotary Peace Fellowship

Projects of Scale



The Rotary Foundation

COVID-19 Response

One-Time Exception

- ▣ District Grants - allow use of 2020/2021 funds to address Covid-19
- ▣ Global Grants - Waiver of 30% foreign financing requirements if addressing Covid-19
- ▣ Disaster Response
 - Transfer of \$1 million from World Fund to Disaster Response Fund
 - One \$25,000 grant available per district

Our District Response to Covid-19

- ▣ District Project Funds and District Grants
 - If addressing Covid-19 there will be no requirement for
 - ▣ Rotarian involvement
 - ▣ \$50/member per average donation to TRF
 - This Rotary Year and next Rotary Year

- ▣ Application to TRF for Disaster Grant of \$25,000
 - Clubs submit requests to district
 - District requests \$25,000 grant
 - Anticipated availability of funds is April 20th

District 6220 Disaster Grant

- Each club may apply for up to \$750
- \$50 average per member donation to TRF is waived
- Rotarian involvement is waived
- Match not required, but encouraged
- Deadline of April 11th
- First come, first served
- Application on district website, Facebook, and emailed to all members
- Contacts are Jack Frost and Steve Handrick

Use of Disaster Funds

- ▣ Support local activities/response
- ▣ Assess your community for need
- ▣ Ideas:
 - Purchasing thermometers
 - Protective medical gear
 - Donations for medical professionals
 - Food insecurity issues
 - Support small businesses

COVID – 19 RESPONSE

What questions do you have?

DPF and District Grant

- ▣ One Guideline Document
- ▣ One Application Form
- ▣ One Report Form

Reference the district website

Grant Comparison

	District Project Fund (DPF)	District Grant	Global Grant
Cash contribution	Dollar for dollar from D-6220 clubs	Dollar for dollar from D-6220 clubs	0.5/1 from TRF 1/1 from D-6220 DDF ¹
Minimum grant	N/A	\$2,600	\$15,000 (\$35,000 project) ² \$10,000 minimum from D-6220 clubs
Maximum grant each club	\$2,599	\$7,500	\$15,000 of DDF
Maximum grant multiple clubs	\$5,000	\$15,000	\$200,000
Local	Yes	Yes	No
Outside 6220 or International	Both	Both	District outside of the U.S. only
Community Assessment	N/A	N/A	Required
Apply	D-6220 Grant Application Form ³	D-6220 Grant Application Form	www.rotary.org/myrotary/grants ⁴
Deadline to Apply	Anytime	May 15 th	Anytime
Number of Grants a Cub Can Participate In Each Year	2	2	3
Report	Annually by April 1 st until project completion	Progress reports due every 6 months. Final report due 2 months post completion	Submitted on-line. Progress reports due annually. Final report due 2 months post completion

District Website

- ▣ Grant Guidelines for District 6220
- ▣ District Grants and District Project Fund
 - Application Form
 - Report Form
- ▣ Global Grants
 - Directs you to RI website
- ▣ Other links
 - Global Grant Scholarship
 - Vocational Training Teams
 - Rotary Peace Fellowship

Common Qualifications

DPF, District Grant, and Global Grant

- ▣ Grant Management Training
- ▣ Signed MOU
- ▣ Reports Current
- ▣ Dues Current
- ▣ Foundation Support of at least \$50/member
 - (not Global)

Common Requirements

DPF, District Grant, and Global Grant

- ▣ Projects support goals and mission of Rotary
- ▣ Active participation of Rotarians
- ▣ Respect Host area's tradition and culture
- ▣ Sustainable
- ▣ No double or triple dipping

Grant Application

DPF and District Grants

- ▣ Check a box
 - DPF or District Grant
 - Local or outside D-6220
- ▣ Provide basic information
 - Contact
 - Project Location
 - Cooperating Organization
 - Area of Focus (for district grant)
- ▣ Authorizations

Grant Application

DPF and District Grants

- ▣ Need or problem
- ▣ Objective(s)
- ▣ Action and time line
- ▣ Sustainability
- ▣ Rotarian involvement
- ▣ Budget

Caveat: Involvement and Sustainability

No Virginia, we will not fund capital campaigns or another organization's fund raising.

Additional Requirements

District and Global Grants

- ▣ Project must align with one of the 6 Areas of Focus
 - ▣ Soon to be 7 Areas of Focus
- ▣ International projects must have a host partners
- ▣ Include signage identifying grant sponsors
- ▣ Comply with conflict of interest policy
- ▣ Other requirements detailed:

Terms and Conditions for Rotary Foundation District and Global Grants

District and Global Grants

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



Follow the \$ - Share Funds

In 2015-2016 RY

37 clubs contributed \$134,247



50% DDF

50% World Fund

\$67,124

\$67,124



\$33,562

\$33,562

District Grants

Match for Global Grants

District and Global Grants

- ▣ Grants cannot be used to:
 - unfairly discriminate against any group;
 - promote a particular political or religious viewpoint;
 - support purely religious functions;
 - support activities that involve abortion or that are undertaken solely for sex determination;
 - fund the purchase of arms or ammunition; or
 - serve as a new contribution to the Foundation or another Rotary Foundation grant.

Grants Cannot Fund:

- ▣ Fundraising activities
- ▣ Unrestricted cash donations
- ▣ Establishment of a foundation
- ▣ Continuous or excessive support of a beneficiary
- ▣ Purchase of land or buildings
- ▣ Public relations unless essential to project
- ▣ Project signage in excess of \$500
- ▣ Operating expenses
- ▣ Activities for which expenses have already occurred
- ▣ More, more, more

District Grants

- ▣ Due May 15th
- ▣ Connect with me!
 - Review and recommendations
 - Make it easy for the reviewers
- ▣ Check out your club's qualifications
- ▣ Review committee
- ▣ Submit to The Rotary Foundation
- ▣ Becomes part of District Budget
- ▣ Reports and evaluations
- ▣ Two years to complete

2019/2020 District Grants

- ▣ \$8,500 to Appleton Rotary for Rotary Smiles Dental Care
- ▣ \$5,100 to Houghton Rotary for Outdoor Public Music Park
- ▣ \$7,850 to Marquette Rotary for Hurley Playground Improvements
- ▣ \$7,500 to Waupaca Rotary for Rock the Block
- ▣ \$5,000 to Ishpeming Rotary for Historic Theater Restoration
- ▣ \$5,000 to Escanaba Rotary for West Side Recreation Trail

\$4,500 pending

$$\$44,545 - \$38,950 = \$5,595$$

DISTRICT GRANTS

What questions do you have?

District Project Fund

- ▣ Unique to our D-6220
- ▣ \$10 per Rotarian per year - \$14,220
- ▣ \$10,873 available as of April 3, 2020
 - Estimated available for 2019-20 is \$26,220
- ▣ Funded \$15,708 worth of grants to date

District Project Fund

- ▣ Maximum of \$2,599 ea.
- ▣ 1:1 match
- ▣ May receive two every year
 - Can also be a secondary on another
- ▣ Local or International
- ▣ Key word: Project
 - Must be a new or include a new twist to existing project
- ▣ Submit any time. First come, first served.
- ▣ Will be notified within 2-4 weeks

2019/2020 Grants

- ▣ Greater Portage - \$1000 Standing Rock
- ▣ Iron Mountain - \$2599 Rotary Pavilion
- ▣ Antigo - \$2599 City Park enhancement
- ▣ Green Bay - \$2599 Rotary Monument landscaping
- ▣ Waupaca - \$400 Rio Bravo Tables Saws and training
- ▣ Kewaunee - \$2599 Kewaunee Schools backpack lunches
- ▣ Portage - \$2000 Nicaragua

- ▣ And more.....

DISTRICT PROJECT FUND

What questions do you have?

GLOBAL GRANTS

Training will be in
mid-April or early May

END OF APRIL 4, 2020
TRAINING

Getting Started

- ▣ *Terms and Conditions for Rotary Foundation District Grants and Global Grants*
- ▣ *Grant Management Manual*
- ▣ Find host partner (must contribute \$100)
- ▣ Conduct needs assessment
- ▣ Define project
- ▣ Rotary Grants Staff: grants@rotary.com
 - Professional expertise
 - Pre-submission review
 - Help redesign projects

Ready to Submit

- ▣ Review proposal with Sally and/or Mary prior to submission
- ▣ Apply at any time – on line form
- ▣ Two review steps:
 - Sally and Mary, then the District Grant Subcommittee
 - When approved, YOU submit it to TRF
- ▣ Final approval from TRF– begin project
- ▣ Reporting

Note: Clubs can be approved for 3 different projects

Global Sponsor Roles

HOST SPONSOR

- ▣ Initiates project
- ▣ Conducts needs assessment
- ▣ Manages project and budget
- ▣ Provides local assistance
- ▣ Receives project funds

INTERNATIONAL SPONSOR

- ▣ Provides financial, technical and other assistance
- ▣ Performs project tasks that can be done remotely & participates in service during visits
- ▣ Prepares vocational training/teams of scholars, etc.

Both:

- * Must be qualified to participate in global grant
- * Develop project plan
- * Have project committees that collaborate
- * Partner with a cooperating organization if needed

Global Grant Minimum Requirements

- ❖ Minimum cash total from Clubs of \$10,000
- ❖ Minimum D6220 DDF match is \$10,000
- ❖ Maximum D6220 DDF match is \$15,000 for any one project regardless of number of Clubs participating
- ❖ Clubs may be approved for up to three (3) different projects – either independently or collaboratively

GLOBAL GRANTS

CLUB(s) PROJECT – Minimum of \$35,000

Club(s)	\$10,000
D6220 DDF match	10,000 - \$15,000
TRF Club match	5,000
TRF DDF match	<u>10,000</u>
PROJECT TOTAL	\$35,000



Current D-6220 Global Grants

- Community Based Water Source in Eastern Sierra Leone (Appleton) \$152,901
- Jhoole Women's Training (Green Bay Clubs) \$165,000
- Scholarship Nicole Ostrand \$30,000
- Uganda Power Porridge (Sturgeon Bay) \$138,000
- Mauini Village Kenya Cisterns (Greater Portage County) \$36,000
- Ghana Sanitation (Houghton) \$35,100
- Sudan Drinkable Water (Wausau) \$42,400
- Micro Credit Hermosillo Mexico, with Dist. 5510 \$102,000

Measurable Goals

- ▣ Your promised improvements to the problem
- ▣ Measurable Goals:
 - Do use: increase, decrease, expand and reduce
 - Don't use: provide, establish, create, participate, install, pilot test, evaluate
- ▣ Written as an outcome of activities, not as the activity itself
- ▣ SMART
 - S = Specific
 - M = Measureable
 - A = Achievable
 - R = Relevant
 - T - Time limited

Write a measurable goal:

- ▣ Area of change _____
- ▣ Target population _____
- ▣ Direction of change
(increase/ decrease/ reduce/ expand)
- ▣ Time frame _____
- ▣ Degree of change _____%

- ▣ To (direction of change) + (area of change) +
(target population) + (degree of change) +
(time frame)

Sample Measurable Goal

Formula: To (direction of change) + (area of change) + (target population) + (degree of change) + (time frame)

Goal: Decrease weekend food insecurity for children in Superior Elementary School by 45%* during the 2016/2017 academic year.

* Baseline should/could be in your problem statement.

Grant Matrix

- ▣ Problem: 25% (250) children in Superior Elementary School report not having food to eat on weekends.
Source: Alger/Marquette Asset Survey 2016.
- ▣ Goal(s): Decrease weekend food insecurity for children in Superior Elementary School by 45%* during the 2016/2017 academic year.
- ▣ Activities:
- ▣ Measure: Resurvey Alger/Marquette Asset Survey

Grant Planning Tool

Grant Matrix

OVERALL GOAL: Assure students in Superior Elementary School have sufficient and healthy food on weekends.			
Problem	Measurable Goals	Activities	Outcome & Process Measures
<p>25% *(53) students at Superior Elementary School report not having food to eat on weekends.</p> <p>*(Source: Alger/Marquette Asset Survey 2016)</p>	<p>Decrease weekend food insecurity for children in Superior Elementary School by 45% during the 2016/2017 academic year.</p> <p>Weekend food packages will be provided to a minimum of 45 students each of the 36 academic weeks.</p>	<ol style="list-style-type: none"> 1. Solicit food donations from local businesses 2. Financially support the purchase of fresh food 3. Identify food storage facility 4. Work with school to identify students with food insecurity 5. Engage volunteers to pack food each week 6. Distribute food packages to students in a dignified manner 7. Work with school to identify community volunteer for long-term sustainability 8. Identify additional funding sources for long-term sustainability 	<p>Resurvey Alger/Marquette Asset Survey</p> <p>Report number of meals/students served</p>

Global Grant Report

- ▣ Purpose of Grant with goals
- ▣ Evaluation of how each goal meets Areas of Focus
- ▣ Monitoring information and plan
- ▣ How parties were involved in project
- ▣ Indicate how parties benefited
- ▣ Identify vendors; areas where funds were spent
- ▣ Financial reports to include bank statements

Two People to Get to Know

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District Grants Subcommittee

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Jack Frost, Chair
District Rotary Foundation

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IT'S ALL ABOUT...

