

WELCOME

Grant Management Seminar

District 6220

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The Rotary Foundation Trainer



# Today's Seminar

- ▣ OVERVIEW AND INTRODUCTION
- ▣ CREATING A PROJECT
- ▣ APPLYING FOR A GRANT
  - Procedures
  - Forms
  - Scenarios
  - Q & A
- ▣ PROJECT IMPLEMENTATION & REPORTS
- ▣ QUALIFICATION
- ▣ QUESTIONS

# Some Abbreviations

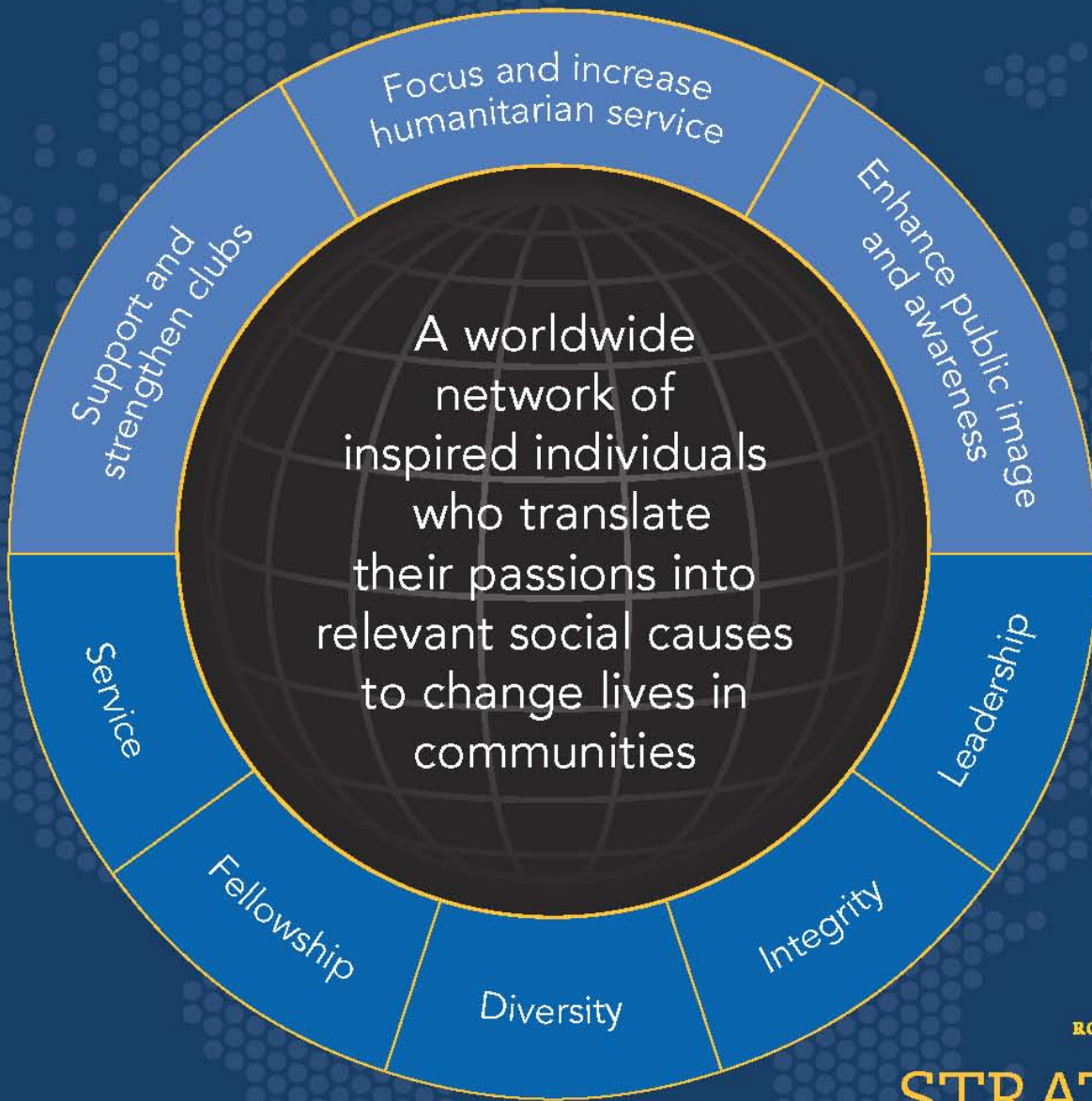
- ▣ TRF  
The Rotary Foundation
- ▣ GMS  
Grant Management Seminar
- ▣ MOU  
Memorandum of Understanding
- ▣ VTT  
Vocational Training Team
- ▣ GSE  
Group Study Exchange
- ▣ DDF  
District Designated Funds

# Rotary Foundation Mission

To enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.



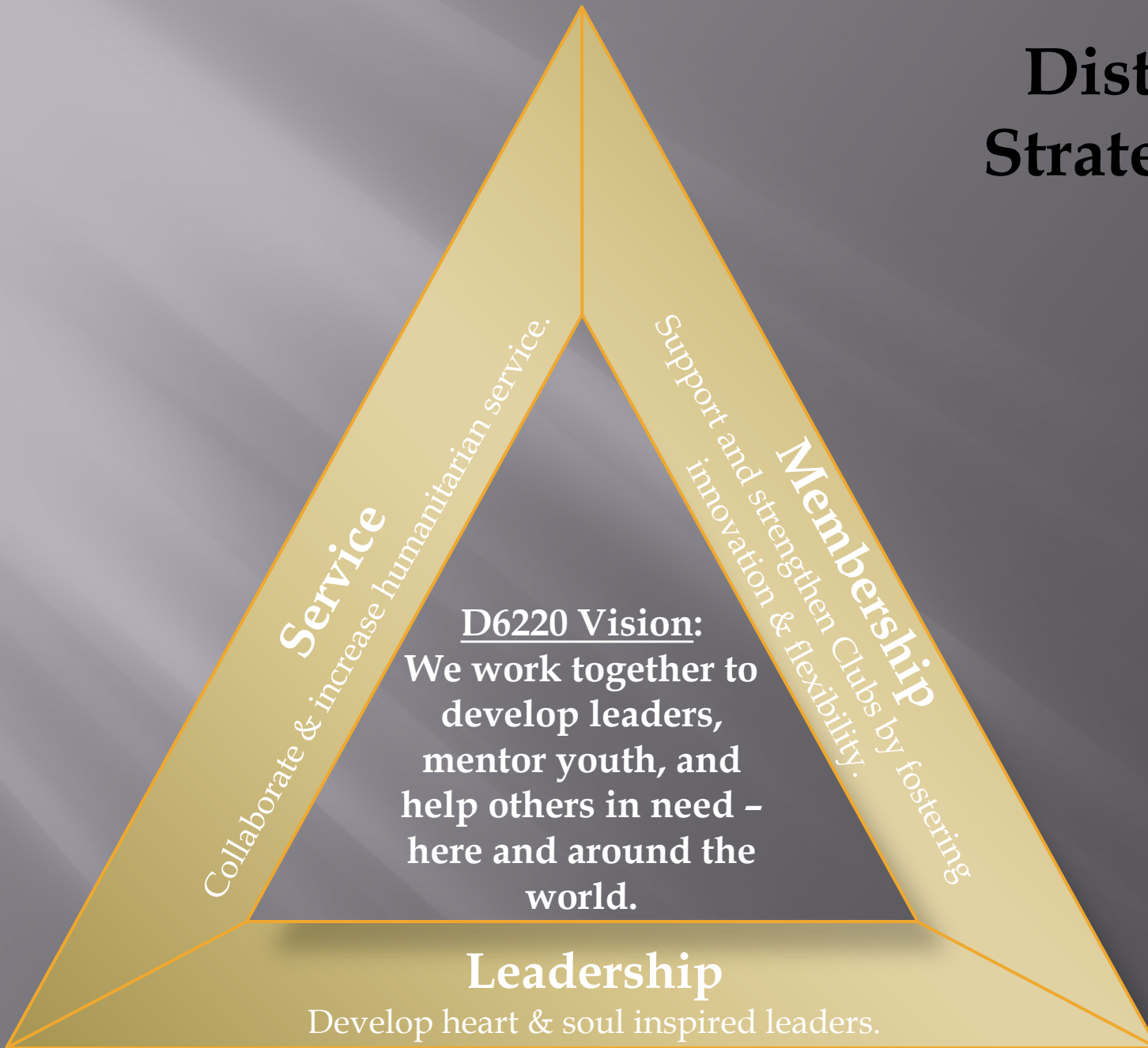




ROTARY INTERNATIONAL

# STRATEGIC PLAN

# District 6220 Strategic Plan 2013-2016



# What is Future Vision?

The Rotary Foundation's **new** grant model that offers clubs and districts the opportunity to carry out projects and activities to

- ▣ Create **greater** impact
- ▣ Build **stronger** clubs
- ▣ **Increase** membership and donor base
- ▣ **Enhance** public image
- ▣ Generate **enthusiasm** to support local service efforts.



# Future Vision

## NEW CONCEPTS AND WAYS A New Vocabulary

- SIX AREAS OF FOCUS
- GLOBAL GRANTS
- DISTRICT GRANTS
- DDF allocation to Global and District
- NEEDS ASSESSMENT
- SUSTAINABLE
- MEASUREABLE
- VTTs (and GSEs)
- SCHOLARSHIPS AS GRANTS
- MEMBER ACCESS AS GATEWAY





# Why Future Vision?

- ❖ Strengthen impact of club projects
- ❖ Sharpen focus of overall grants activity
- ❖ Transfer more decision-making locally
- ❖ Partner with other organizations
- ❖ Simplify the Foundation grants process
- ❖ Increase visibility and image



# Future Vision

HOW?

District Memorandum Of Understanding (MOU)  
More stewardship responsibility at District level

➔ Club MOU

➔ Grant Management Seminar (GMS)

District TRF structure

➔ Grant processes  
Global Grants  
District Grants  
Packaged Grants



# Who can help me?

District Governor



District Governor  
Elect

District Governor  
Nominee



District Rotary  
Foundation Chair



Fundraising    Asst. Governor    District Grants    Polio Plus    Scholarships    TRF Trainer    Audit    Stewardship



# Future Vision Grants

District Grants

Global Grants


Packaged Grants



# Comparing Grants

- ▣ District Project Fund:
  - Up to \$2,500/Club once per year
  - Local or International
- ▣ District Grants:
  - Minimum of \$2,600; Max. of \$7,500/Club or \$13,000 per project match
  - Local or International
- ▣ Global Grants:
  - Minimum \$10,000 per Club(s); Max. of \$15,000 D6220 match
  - International only (VTT only)
- ▣ Packaged Grants:
  - Funded entirely by World fund and strategic partner





# Keys to Successful Grant Projects

- ❖ Meet real community needs
- ❖ Have frequent partner communication
- ❖ Have implementation plan with measurable goals and outcomes
- ❖ Are sustainable beyond life of the grant





# Project Planning

- ▣ Form a three-person committee
- ▣ Assign roles
- ▣ Set measurable and sustainable goals
- ▣ Create a budget
- ▣ Create an implementation plan
- ▣ Have a contingency plan





# Sustainability

- ▣ A sustainable project typically involves local community leaders in planning so they are invested in the project's long-term success.





# Future Vision

## 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





# District Grant Requirements

1. One or more member(s) of your Club must attend Grant Management Seminar annually
2. Club President and President-Elect must sign Club and District MOU annually
3. All open and completed grants must be current on reporting
4. Club must meet all requirements, including a minimum contribution to The Rotary Foundation of \$500





# District Grants

- ▣ Grants that allow clubs and districts to address immediate needs in their communities and internationally.
- ▣ Sponsor activities locally and internationally
- ▣ Can be local or international – if international, will need an international Club as a partner
- ▣ \$1.00 for \$1.00 match
  - \$2,600 to \$7,500 for a single project
  - Up to \$13,000 if include additional District Clubs in project
- ▣ Must meet one of Six Areas of Focus
- ▣ May 15, 2013 is proposal deadline





# District Grants

- ❖ Clubs may be approved for up to two different projects
- ❖ Clubs cannot be approved for District matching funds for the same project for both District Project Fund (DPF) and Global Grant
- ❖ Clubs cannot be approved for District matching funds for the same project in future years
- ❖ International host partners must contribute a minimum of \$100 U.S. to the project
- ❖ All open and completed grants must be current on reporting

# District Grants

- ▣ Not 1<sup>st</sup> come, 1<sup>st</sup> serve
- ▣ Proposals due 5/15/13
- ▣ Decisions made by 7/1/13

# Examples of District Grants

Local or International Service Projects

Providing food for school age children

Education materials for children with disabilities

Bike Trail

Park

Scholarships





# District Grant Proposal

<http://www.ridistrict6220.org/foundation-information//matching-grants.php>







# District Grants

*Scenarios*

# Global Grant Qualifications

- ❖ One or more member (s) of your Club must attend GMS annually
- ❖ Club President and President-Elect must sign Club and District MOU annually
- ❖ Club must meet all requirements, including a minimum contribution to TRF of \$500
- ❖ Must have a Host Partner which contributes a minimum of \$100 US to project
- ❖ Clubs cannot be approved for same project for DPF or District Grants
- ❖ All open and completed grants must be current on reporting



# Global Grants

- ▣ Educational and humanitarian purposes consistent with the Six Areas of Focus
- ▣ Sustainable outcomes with long-term impact
- ▣ Only International
- ▣ Require host & International partners
- ▣ GMS + District and Club MOU required annually





# Global Grants

- ▣ Larger grant awards (min. \$10,000 D6220 match; min. total grant of \$35,000)
- ▣ 1:1 match of DDF; 0.5:1 match of Club funds
- ▣ Host Partner must contribute a min. of \$100 U.S. to the project
- ▣ Must align with at least one of the Six Areas of Focus
- ▣ Needs Assessment required



# Global Grant Minimum Requirements

- ❖ Minimum cash total from Clubs must be \$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



# Future Vision

## GLOBAL GRANTS DISTRICT 6220

CLUB(s) PROJECT – Minimum of \$35,000

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



# Examples of Global Grants

- ▣ Education & Literacy project in Honduras
- ▣ Global Scholar (Graduate Degree)
- ▣ PowerFlour
- ▣ The Etta Projects
- ▣ Water and Sanitation project in Kenya
- ▣ SAMP





# Vocational Training Team (VTT)

- ▣ Can be part of Global Grant proposals
- ▣ Build on The Rotary Foundation's commitment to vocational training
- ▣ Support TRF mission to promote goodwill and peace, improve health, support education, and alleviate poverty
- ▣ Align with an area of focus and have a sustainable and measurable impact



# Vocational Training Team (VTT)

- ▣ Consist of at least 2 members (either Rotarians or non-Rotarians) with at least 2 years of professional experience in the area of focus; and a Rotarian leader who has expertise in the area of focus
- ▣ Team composition may include Rotarians and non-Rotarians of any age
- ▣ No time limit on duration of VTT
- ▣ May incorporate some cultural activities along with hands-on training





# Global Grant Proposal



<http://www.rotary.org/en/grants/grants-basics/manage-grants>





# Global Grant

*Scenarios*

# Packaged Grants

- ❖ Funded entirely by the World Fund and a strategic partner
- ❖ No contribution required by District or Club
- ❖ TRF and Partner provide pre-designed project
- ❖ Rotarian focus is implementation
- ❖ Posted online as they become available

Future Vision Grant Distribution Example  
ANNUAL PROGRAMS GIVING

\$168,663.02



Earnings used for administrative costs

2013-14

\$84,331.51

50% to D6220 District Designated Fund (DDF)

\$84,331.51

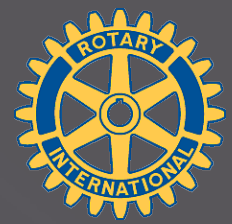
50% to World Fund

\$42,165.75

Up to 50% to District Grants based on Club proposals

\$42,165.76

At least 50% to Global Grants



# Why money chart is important

- ▣ Grants are not a first come first serve
- ▣ 5/15/13 proposals are due in order to determine allocation of money to District Grants and Global Grants
- ▣ Decisions are made by 7/1/13 for District Grants
- ▣ Global Grant decisions are made as proposals are submitted



# What is a MOU?

- ▣ Memorandum of Understanding
- ▣ Terms of qualification
- ▣ Club leadership responsibilities
- ▣ Financial management/stewardship
- ▣ Document retention
- ▣ Reports
- ▣ Annual Submission







# MOU



# Record Keeping

- ▣ Begins July 1, 2013

With The Rotary  
Foundation as a  
partner



# Record Keeping

- ▣ Reports are submitted through Member Access
- ▣ Progress report must be submitted to the District Grants Chair every 6 months until project is completed
- ▣ Final report due within 2 months of project completion
- ▣ Overdue reports result = inability to submit new grant applications



# Example of Global Grant Report

- ▣ Purpose of Grant with goals listed
- ▣ 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
- ▣ Include bank statements

# Why Support this Model?

- ▣ Use of Foundation resources more strategically by supporting projects that will make a greater impact on communities worldwide, affect a significantly larger number of beneficiaries, and enhance Rotary's public image. Greater recognition of Rotary's work will, in turn, lead to increased interest in joining Rotary and supporting its civic and humanitarian efforts.







# What does NOT change?

- ▣ Service Above Self
- ▣ PolioPlus, until disease eradicated
- ▣ Peace Fellowships
- ▣ Need for giving to support TRF
- ▣ Giving recognition



# How Can Your Club Integrate?

Future Vision,  
Membership  
and  
Public Image?



# IT'S ALL ABOUT...

