



The Rotary Foundation
of Rotary International

Qualification/Grant Management
Training Seminar

2016/17

Qualification/Grant Management Training



Grant Structure

All Project Funding Will Be By Grants

- Global Grants
- District Grants - Up to 50% of total DDF

Global Grant World Fund Matching Limitations

- Minimum World Fund match must exceed \$15,000!

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New Grant Structure

Global Grants

- Scholarships
- Vocational Training Teams
- International Humanitarian Projects

District Grants

- Club Project Grants (CPG)
 - ✓ Local Humanitarian Projects
 - ✓ International Humanitarian Projects
- Scholarships
- Training or Exchange Teams

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General Requirements

Reference Material In Handout

- DRFC Manual 3 - Foundation Grants - General
- 2016-17 Club Memorandum of Agreement
- Club MOU - Documentation Guide
- Club MOU - Suggested Bylaws Amendments
- 2016-17 Club Qualification Checklist

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General Requirements

The Rotary Foundation Resources

- www.rotary.org/en/grants

District 5830 Resources

- www.rotary5830.org

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General Requirements

Districts and Clubs Must Be Qualified to Participate

- District must meet TRF qualification requirements
 - ✓ DG and Foundation Chair must be trained.
 - ✓ DG, DGE and DRFC must sign District MOU
 - ✓ MOU terms must be implemented

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General Requirements

Districts and Clubs Must Be Qualified to Participate

- Clubs must meet District qualification requirements
 - ✓ President and Foundation Chair must be trained
 - ✓ Presidents and Foundation Chair must sign Club MOU
 - ✓ MOU assertions must be documented
 - ✓ Club must be in good standing with District and RI
 - ✓ Club must be “tax exempt organization”
 - ✓ Club must have made APF contributions three years prior
 - ✓ MOU terms must be implemented

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General Requirements

Qualification Must Be Renewed Annually!

- Districts must re-sign District MOU
 - ✓ DG and Foundation Chair must be trained
- Clubs must re-sign Club MOU
 - ✓ New President and Foundation Chair must be trained
 - ✓ Club must be in good standing with District and RI
 - ✓ Club must remain a “tax exempt organization”
 - ✓ Club must have made APF contributions three years prior

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General Requirements

Grants Must Address One or More 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

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General Requirements

Grants Must Be Sustainable

- Capable of maintaining outcomes over the long term to serve the ongoing need of a community after grant funds have been expended.
- Involves local community leaders in planning so that they are invested in the project's long-term success.
- Training and the exchange of information prepare communities to maintain results and solve problems on their own, after the Rotary club's involvement has ended.
- Offers enduring value and a greater return on Rotary's investment of money and volunteer hours.

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District Committee Structure

District Rotary Foundation Committees

- District Rotary Foundation Committee
 - Grants Subcommittee
 - District Grant Subcommittee
 - Global Scholarship Grants Subcommittee
 - Global Vocational Training Team Grants Subcommittee
 - Global Humanitarian Project Grants Subcommittee
 - Stewardship Subcommittee
 - PolioPlus Subcommittee
 - Fundraising Subcommittee
- District Audit Committee

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Club Qualification Requirements

Memorandum of Understanding Purpose

- Stewardship and management continuity
- Financial management responsibilities
- Document retention policies
- Grant reporting responsibilities
- Reporting and resolution misuse of grant funds

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Club Qualification Requirements

MOU Assertions Documented

- Conflict of interest policy and audit cooperation
- Leadership responsibilities and succession
- Financial management responsibilities
 - ✓ Separate bank accounts with dual signatures
 - ✓ Plan for orderly transfer of custody of funds
 - ✓ Financial reporting system
- Reporting responsibility accepted and assigned
- Method for handling misuse of grant funds

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Club Qualification Requirements

MOU Assertions Documented

- Document retention plan
 - ✓ Qualification documentation
 - ✓ Policies and procedures required by MOU
 - ✓ Original documents related to grants
 - ✓ Identified storage site and assigned custody
 - ✓ Seven year minimum storage time.
- Copy of latest IRS filing.

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Club Qualification Requirements

MOU Documentation Suggestions

- Update Bylaws
 - ✓ Scattered throughout
 - ✓ Added as its own article
- Develop Grants Policy Manual

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Any Questions?

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District Grants

Can Be Up To 50% of DDF

- Districts can request up to 50 percent of their District Designated Fund (DDF) in one annual block grant.
- Districts are responsible for administering the activities undertaken with these funds. They may disperse these grant funds at their discretion for district or club sponsored activities.

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District Grants

Reference Material In Handout

- DRFC Manual - 4 - District Grant
- 2016-17 Maximum CPG Request Amount
- 2016-17 Club Project Grant Application - Requirements
- 2016-17 Club Project Grant Application
- 2016-17 Club Project Grant Interim Report
- 2016-17 Club Project Grant Final Report

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District Grants

Types of Activities

Districts may support a broad range of activities with their district grant funds. Examples of potential district-grant activities include:

- Club Project Grants
- Scholarships
- Vocational Training Teams
- International service projects

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District Grants

Club Project Grants

- Tool for Rotary districts to support Rotary clubs
- Short-term humanitarian projects that benefit the community
- Clubs can work collaboratively to implement a project

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District Grants

Club Project Grant General Requirements*

- Club must be “qualified” to apply.
- Project must
 - ✓ Support local or international humanitarian and service projects.
 - ✓ Address at least one of the six areas of focus.
 - ✓ Include the active participation of Rotarians.

*Detailed requirements located in the District Manual and CPG Application Packet

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District Grants

When to Apply for Club Project Grant

For the Rotary year beginning July 1, 2015, the following dates shall apply:

- May 1, 2016 - deadline to submit application paperwork to the District Grant Committee Chair
- May 1 - 15, 2016 - District Grant Committee will review submitted applications, contact the submitting club for clarification if necessary, and approved grants
- Approved CPGs will be funded in mid to late July, as soon as District Grant funds are received from TRF

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District Grants

Club Project Grant - Reporting Requirements

A final report is due within **one month** of the completion of the project to the District Grant Committee.

- Interim reports are required on January 15, 2017.
- The project must be completed on or before May 1, 2017 and the final report must be received and accepted on or before the June 1, 2017.



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District Grants

Club Project Grant - Reporting Requirements

- An interim report should provide the status of the project and projected completion date and actual and future expenditures against budget.
- The final report is to provide photographs, media coverage and actual expenditure against budget. The club must submit receipts (matched against budget items) and an accounting of all expenditure of grant funds. Grant funds not used must be returned to the district.
- All reports and supporting documentation Club Project Grant must be kept by the club for seven years after project completion and acceptance of the final report by the District Grants Subcommittee.

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District Grants

Club Project Grant – Consequences of Failure!

Failure to follow the requirements as outlined in the district manual, failure to complete the project, or failure to timely file the final report may disqualify the club from future club project grants and/or necessitate the repayment of funds received.



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District Grants

Club Project Grant - Documentation Requirements

The documents that must be maintained and available to TRF for audit include, but are not limited to:

1. All bank account information.
2. Copies of bank statements.
3. Documentation of change in payee signatories, if any.
4. The General ledger with all of the itemized deposits, withdrawals, expenditures and journal entries.
5. The procedure for storing documents and archives (hard copies/electronic copies).
6. Grant application documents.
7. Grant reports from sponsoring clubs or other participants.
8. Copies of receipts, invoices and other grant documentation.
9. Completed project photos where applicable.

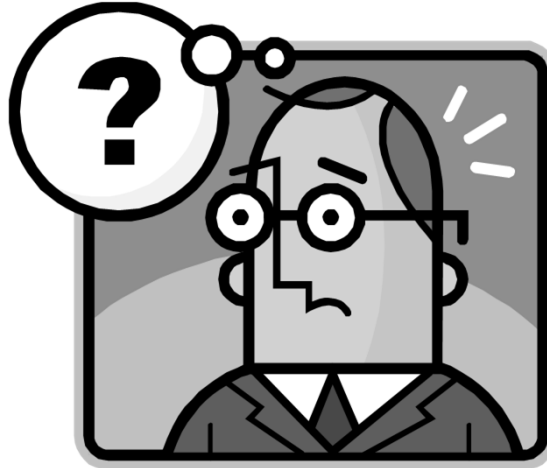


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District Grants

Questions?



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Global Grants

Global Grants Must:

- **Support communities in Rotary countries** and geographical areas.
- **Align with one or more of Rotary's areas of focus.**
- **Be sustainable.** Host communities must be able to address their own needs after the Rotary club or district has completed its work.
- **Be measurable.** Sponsors select standard measures from the Global Grant Monitoring and Evaluation Plan supplement, and may add their own measurements in their report to the Foundation.
- **Be host community-driven.** The host community designs the grant based on local needs that they have identified.
- **Be sponsored by at least two Rotary clubs** or districts in the country or geographical area where the grant project will take place (**primary host sponsor**) and one or more outside that country or geographical area (**primary international sponsor**).

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Global Grants

Global Grants Can:

- Support humanitarian and educational projects.
- Provide scholarships to fund graduate-level coursework or research or its equivalent for a term of **one to four** academic years.
- Support vocational training teams that address a humanitarian need by providing or receiving professional training.
- Support travel for up to two individuals as part of a humanitarian project. These individuals provide training or implement the project should the host club confirm that their skills are not readily available locally.
- Include up to 10 percent of the project budget for a project manager.

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Global Grants

Funding Requirements

The minimum award amount from the World Fund for a global grant, regardless of activity type, is US\$15,000, which results in a minimum total financing of \$30,000.



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Global Grants

Administration Requirements

Clubs will sponsor all global grant applications. If approved, the sponsoring club will be responsible for all administrative duties supporting the grant including:

- Supervising the project activity to completion.
- Managing the grant funds.
- Reporting on grant progress to the district or the Rotary Foundation.
- Documenting all project activities and maintaining documentation records for a minimum of 5 years after the project is completed.

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Global Grants

Grant Application Acceptance

- Rolling basis throughout year.
 - Global Vocational Training Teams
 - Global Humanitarian Grants
 - Global Packaged Grants
- From January 1 to April 1 each year.
 - Global Scholarships

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Global Scholarship Grants

2016-17 Global Scholarship Grant Available

DGE Lee Montgomery has approved District 5830 granting at least ONE \$30,000 GSG during 2015-2016.



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Global Scholarship Grants

Reference Material In Handout

- DRFC Manual - 5 - Global Scholarship Grants
- DRFC Manual - TRF Global Grant Scholarships Supplement
- DRFC Manual - 5 - Global Scholarship Grants – Policy Guide
- Global Grants Scholar Application
- Global Scholarship Grant - TRF Application

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Global Scholarship Grants

Scholarship Application Process

- Completed scholar applications will be received through April 1.
- The District Scholarship Committee will interview applicants between April 1 and April 15.
- The selected scholar applicant and their sponsor club will go online to complete the online application, which includes uploading the scholar application form.
- After the online application is completed, the Global Scholarship Grants Chair will review it and submit it to the Rotary Foundation.

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Global Scholarship Grants

Scholarship Application Process

- Global grant scholars are individuals who are pursuing a career in one of the six areas of focus.
- Their graduate-level educational goals should support this career interest.



Peace and Conflict Prevention/Resolution



Disease Prevention and Treatment



Water and Sanitation



Maternal and Child Health



Basic Education and Literacy



Economic and Community Development

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Global Scholarship Grants

Scholar Eligibility Requirements

- The candidate must be proficient in the native language of the host country (please contact your global grant coordinator for exceptions).
- The candidate's program of study must be at the graduate level.
- The scholar must be traveling abroad for study.
- The scholarship is for a term of one to four academic years.
- Scholars need to live in their host district.
- At the time of the proposal, the candidate must know where he/she wants to study and the sponsors must identify the name of a primary contact in the host district.

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Global Scholarship Grants

Scholarship is Focus, BUT

In global grants, ambassadorial skills are optional for scholars. The primary consideration is forging a link between Rotary and future skilled professionals within an area of focus.

That said, global grant scholars are expected to participate in Rotary activities, and their Rotarian sponsors should provide opportunities for them to do so.



Global Grants

Questions?

