

Creating International Service Projects in District 5500

Rotary Leadership Institute III Session 2

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Grant Chair Barbara Kiernan





Agenda Overview

- **Overview of The Rotary Foundation**
- **Review of Grants**
- **Rotary's Areas of Focus**
- **International Service Projects**
- **How to Get Involved**



Overview of The Rotary Foundation





A ROTARY CLUB'S PURPOSE

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Every Rotary Club Constitution has these 5 Purposes:

- (a) pursue the Object of Rotary;**
- (b) carry out successful service projects based on the five Avenues of Service (Club, Vocational, Community, International and New Generations);**
- (c) contribute to the advancement of Rotary by strengthening membership;**
- (d) develop leaders beyond the club level;**
- (e) support The Rotary Foundation.**



Mission Statement:

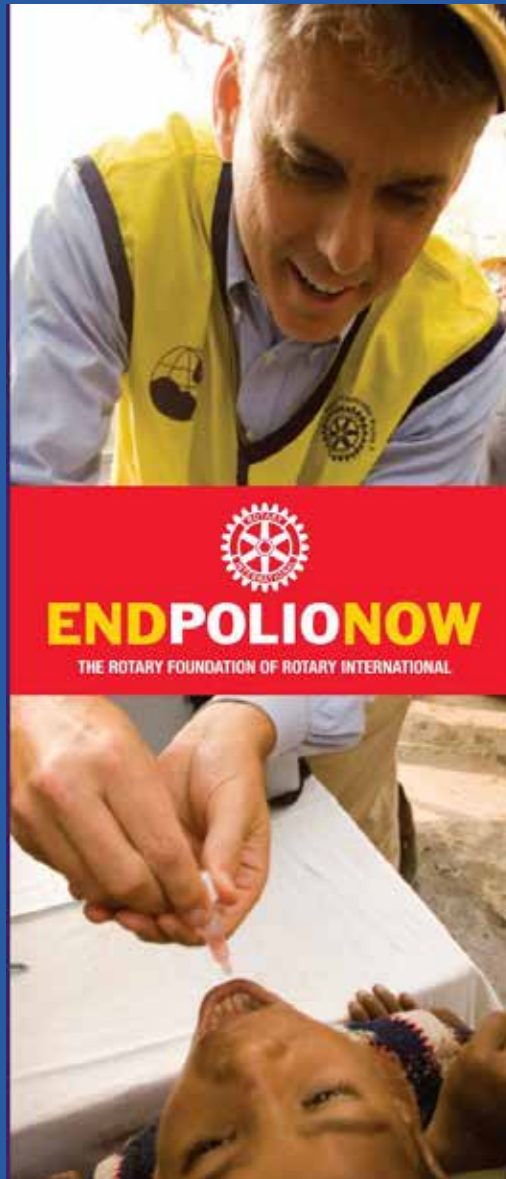
The Mission of The Rotary Foundation is to help Rotary members to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and the alleviating poverty.

Every Rotarian Every Year

Doing Good in the World

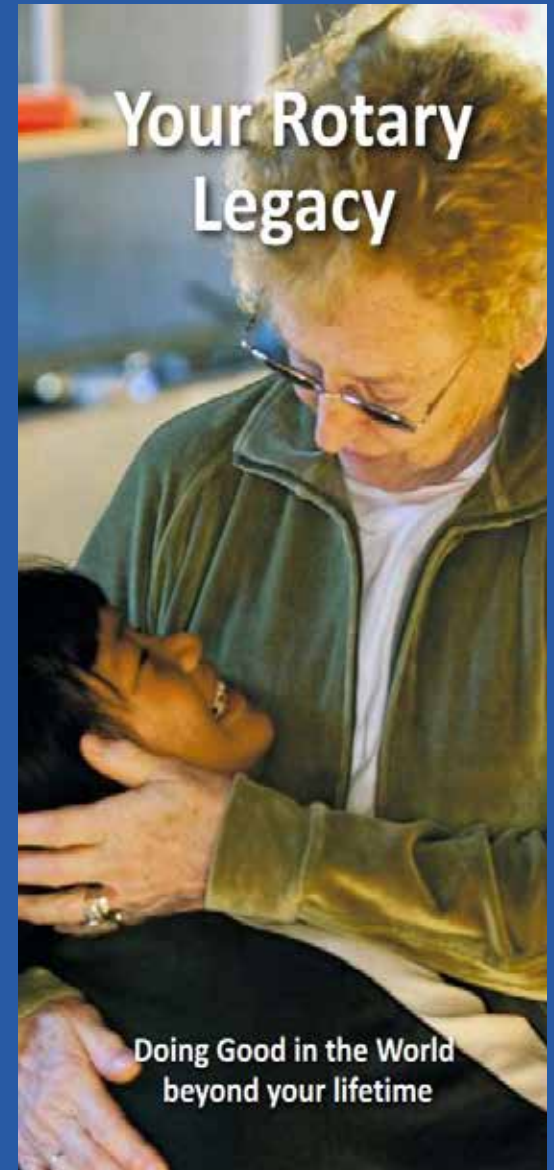


ANNUAL FUND/SHARE
Every Rotarian, Every Year



POLIOPLUS

Your Rotary Legacy



Doing Good in the World
beyond your lifetime

ENDOWMENT FUND

The Programs of the Rotary Foundation



Grant Programs



Peace Fellow Program



**End Polio Now
Campaign**

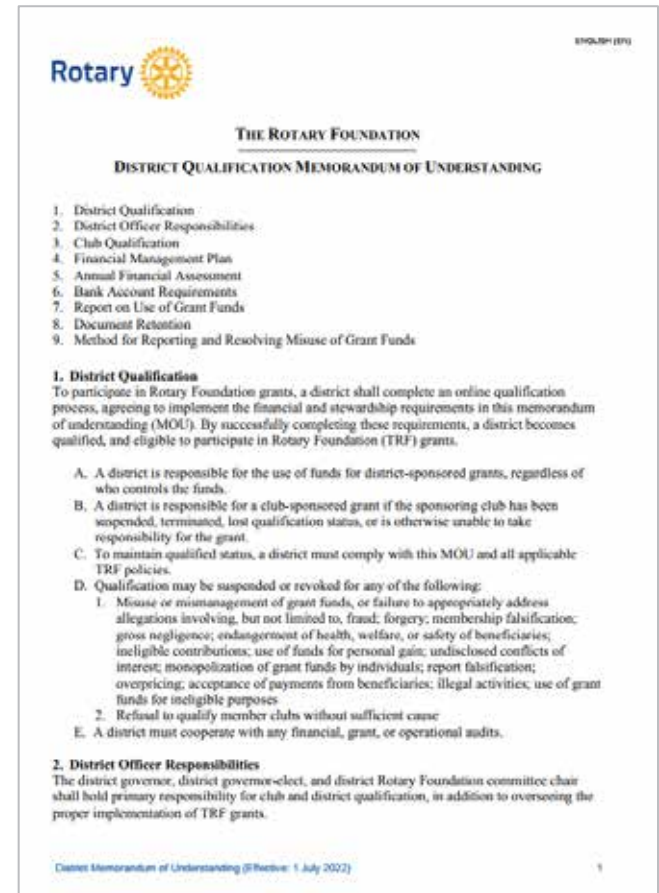


QUALIFICATION

DISTRICT QUALIFICATION

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- District leaders complete the qualification process online each year.
- They agree to implement the Memorandum of Understanding.
- They conduct Grant Management Seminars for clubs.





CLUB QUALIFICATION

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To Use DDF (District Designated Funds):

Clubs must qualify annually:

- **Two members attend** Grant Management Webinar
- President submits a signed MOU
- Club current on RI and District Dues
- Club president attended PETS
- Must have a club TRF Chair

MOU (Memorandum of Understanding)

District Grants: MOU is Part of the Grant Application

DISTRICT GRANT MEMORANDUM OF UNDERSTANDING



AS PRESIDENT AND PRESIDENT ELECT OF MY ROTARY CLUB.
WE AGREE TO THE FOLLOWING:

Club Qualification: To participate in Rotary Foundation District Grants, the club must:

1. Agree to adhere to fund management and stewardship guidelines that insures the use and management of the grant funds meet audit and fiduciary requirements as set out in the *Terms and Conditions for Rotary Foundation District Grants and Global Grants* and as outlined in the *District 5500 Grant Policy*.
2. Assume responsibility for the use of funds for club-sponsored grants, regardless of who controls the funds.
3. Cooperate with any financial, grant, or operational audits.
4. Be current on all financial obligations with District 5500 and with Rotary International (RI), any grant reporting requirements with the District and RI, and tax reporting requirements with the IRS.

To maintain qualification the club must:

1. Complete the qualifications requirements annually (GMS training, MOU and Addendum).
2. Comply with this MOU, any additional district requirements, and all applicable TRF policies.

Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; and use of grant funds for ineligible purposes.

Club Officer Responsibilities: The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants. Those responsibilities include:

1. Appointing at least one club member to implement, manage, and maintain club qualification
2. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices
3. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest
4. Reporting any actual or perceived conflict of interest to the District

Report on Use of Grant Funds and Document Retention: The club must adhere to all RI reporting requirements to include:

1. Completion of Final Report
2. Submission of proof of expenditure of funds to include actual receipts, copy of cancelled check, or recipient acknowledgment letter with details of contribution.
3. Retention of grant documents for a minimum of five years, or longer as required by local law.

Reporting Misuse of Grant Funds: The club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the club that does not tolerate the misuse of grant funds.

Authorization and Agreement

This Memorandum of Understanding is an agreement between the club and the district and acknowledges that the club will undertake measures to ensure the proper implementation of grant activities and proper management of The Rotary Foundation grant funds. By authorizing this document in the DACdb grant module, the club agrees to comply with all of the conditions and requirements of the MOU.

On behalf of our Rotary Club in District 5500, Southern Arizona, the 2024-25 President and President Elect agree to comply with all of the conditions and requirements of the MOU for this Rotary year and will notify District 5500 of any changes or revisions to club policies and procedures related to these requirements.

District 5500 Addendum to the MOU

DISTRICT 5500 GRANT CLUB PRESIDENT CERTIFICATION FORM

2024-2025

Rotary club:

Club President
Initials

Our club agrees to all the terms of The Rotary Foundation *Club Qualification Memorandum of Understanding (MOU)*

Two members of our Club have viewed the Grant Management Seminar in its entirety. Those members are:

1.
2.

Name of our club's designated Rotary Foundation Chair is:

The undersigned President confirms that all information contained in the District Grant Application:

Is true and accurate to the best of their knowledge;

That the club has agreed to undertake this project as an activity of the Rotary club;

That the club will comply with the required reporting and financial responsibilities outlined in this Application and The Rotary Foundation's *Terms and Conditions for Rotary Foundation District Grants*;

That a complete Final Report will be provided within 60 days of project completion and not later than May 1st. In the event the project is not completed by May 1st, a Progress Report will be filed along with a written request for an extension to a date certain.

4 GRANT TYPES

- District Grants
- Global Grants
- Disaster Response Grants
- Programs of Scale grants





DISTRICT GRANTS

- Fund small-scale, short-term activities
- Must have active Club and Rotarian involvement
- Align with the Foundation's mission
- Apply to D5500 in DACdb



DISTRICT GRANT EXAMPLES

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Rio Rico	Rio Rico Rotary Walking Trail Benches	1,000.00
SaddleBrooke	Low Income Senior Christmas Party	2,500.00
Sahuarita	Books for Kinders in English & Spanish	2,500.00
Sierra Vista	Research Books for Students	2,177.51
Sierra Vista Sunrise	Sierra Vista Heartland Trial Project	4,000.00

D5500 Toolbox for Club Rotary Foundation Chairs

What is The Rotary Foundation?

Rotary Foundation Reference Guide (pdf)

Rotary Foundation Facts 2021 (pdf)

Rotary Learning Center – Rotary Club Foundation Basics [CLICK HERE](#)

What is my Role as the Club Rotary Foundation Chair?

Job Description of Club Rotary Foundation Chair (pdf)

Working with your Club Foundation Committee (pdf)

How Do I contribute to The Rotary Foundation?

Rotary Foundation Contribution Form (pdf)

Rotary Foundation Multiple Donor Contribution Form (pdf)

Rotary Direct FAQs (pdf)

Rotary Direct Enrollment Form (pdf)

Planned Giving Guide for Donors (pdf)

Memorial or Tribute Form (pdf)

IRA Transfer Instructions Form (pdf)

What is a Rotary Legacy?

Your Rotary Legacy Brochure (pdf)

Your Rotary Legacy Commitment Form (pdf)

Planned Giving Guide for Donors (pdf)

Your Rotary Legacy: [Endowment Pledge/Commitment Form](#) (online)

How Do I transfer Paul Harris Recognition Points?

Paul Harris Recognition points transfer request form (pdf)

What is the Paul Harris Society?

Paul Harris Society Brochure (pdf)

What is the PolioPlus Society?

D5500 Polio Plus Society enrollment Form (pdf)

Videos

Thank You to the Rotary Foundation 2022 (1:39)

The Rotary Foundation Showcase (3:10)

Celebrate Giving to The Rotary Foundation (1:05)

TRF TOOLKIT ONLINE

rotaryd5500.org

GLOBAL GRANTS

- Fund larger, longer projects with sustainable, measurable results
- Align with our areas of focus
- Include international partners
- Have a \$30,000 minimum budget
- Receive an 80% match from the World Fund for DDF





DISASTER RESPONSE GRANTS

- Support relief and recovery efforts in areas affected by natural disasters
- Are funded by contributions to the Disaster Response Fund

Rotary International also partners with Shelterbox for disaster relief.



PROGRAMS OF SCALE GRANTS

- Support long-term activities that benefit more people
- Align with the areas of focus
- Provide up to US\$2 million from the World Fund
- Are implemented with partners
- Use a competitive process





PROGRAMS OF SCALE AWARDEES

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2021 Partners for a Malaria-Free Zambia

**2022 Together for Healthy Families in
Nigeria**

**2023 United to End Cervical Cancer in
Egypt**

**2024 Partners for Water Access and Better
Harvests in India**

2025 Will be announced in June



HOW GRANTS ARE FUNDED

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Grant	Club Funds	DDF	World Fund
District Grant	XX	XX	
Global Grant	XX	XX	XX
Programs of Scale			XX
Disaster Response		XX	Disaster Response Fund

2023-24 GRANT STATISTICS

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DISTRICT GRANTS

485 grants

\$29.2M

GLOBAL GRANTS

1,287 grants

\$72.1M

DISASTER RESPONSE GRANTS

106 grants

\$3.8M

PROGRAM OF SCALE GRANT

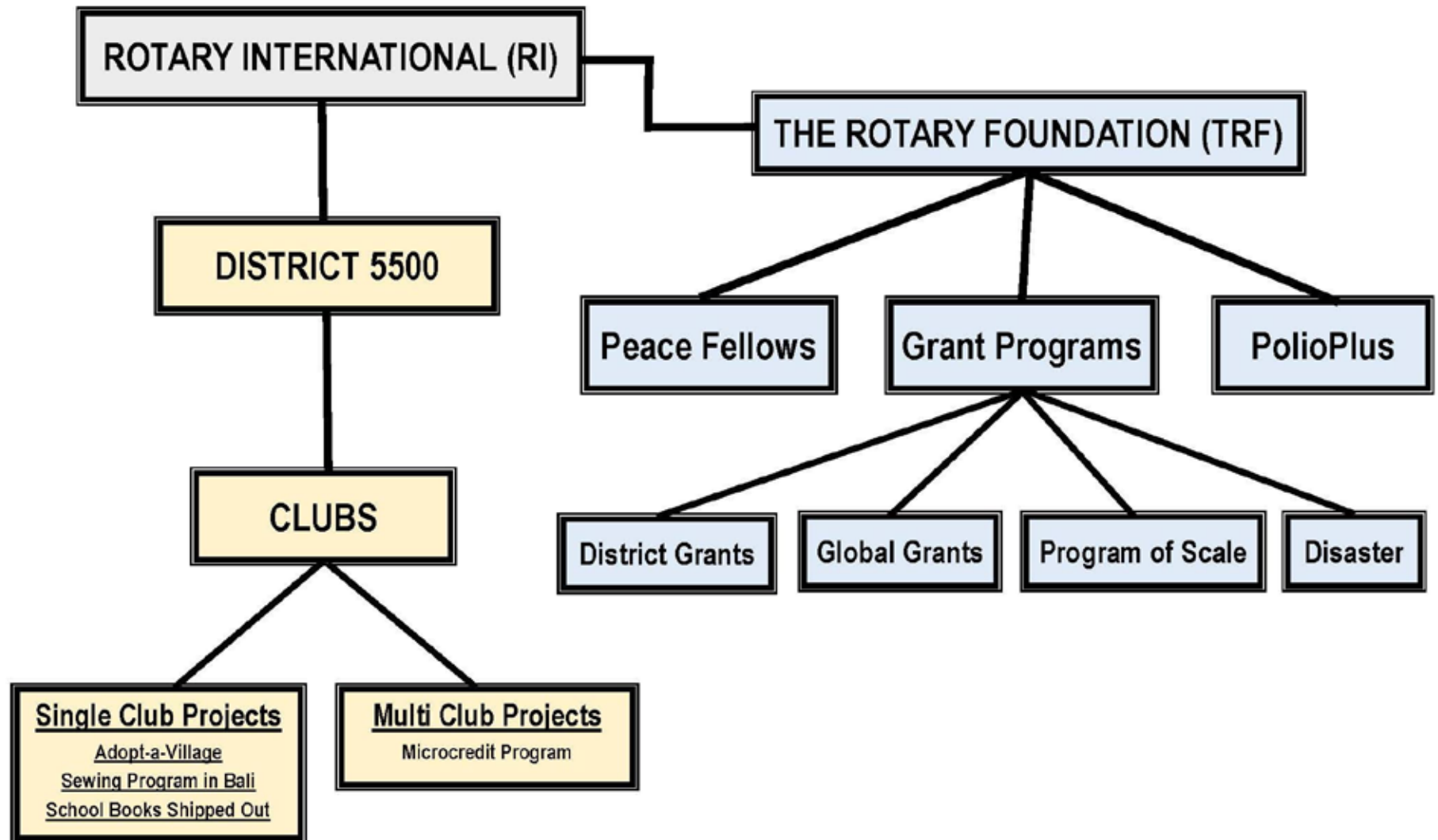
1 grant

\$2M plus partners





Creating International Service Projects in D5500



ROTARY'S 7 AREAS OF FOCUS

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- **Peacebuilding and conflict prevention**
- **Disease prevention and treatment**
- **Water, sanitation, and hygiene**
- **Maternal and child health**
- **Basic education and literacy**
- **Community economic development**
- **Environment**





SUSTAINABILITY

- The concept of sustainability varies across different organizations.
- For Rotary, it signifies the ability to sustain results within the community and to address its ongoing needs.

SUSTAINABILITY STEP NO. 1

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Start with the community

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



SUSTAINABILITY STEP NO. 2

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Encourage local ownership

Identify key community members who can help pioneer lasting improvements.



SUSTAINABILITY STEP NO. 3

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Provide training

A project's success depends on people.





SUSTAINABILITY STEP NO. 4

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Buy local

Purchase equipment and technology from local sources.



SUSTAINABILITY STEP NO. 5

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Find local funding

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



SUSTAINABILITY STEP NO. 6

30

Measure your success

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





COMMUNITY ASSESSMENTS

WHAT IS A COMMUNITY ASSESSMENT?

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- It is a formal process to understand the community's priorities.
- It examines local strengths, weaknesses, needs, and assets.
- It helps you identify relevant opportunities and key people to involve.





WHAT DO THESE ASSESSMENTS DO?

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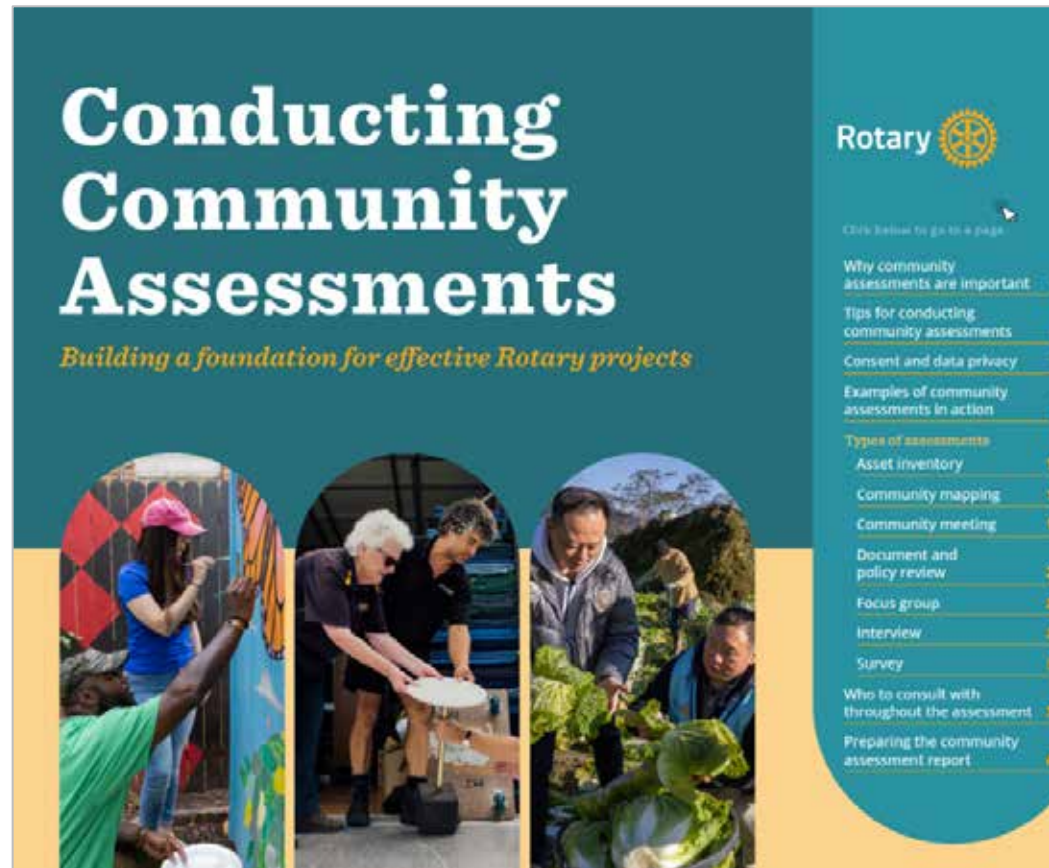
- Provide a better understanding of the community's dynamics
- Help you make informed decisions and understand service priorities
- Establish valuable relationships and trust
- Involve community members from the beginning
- Help design the project with sustainability in mind



ASSESSMENT METHODS

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- Community meetings
- Surveys
- Interviews
- Focus groups
- An asset inventory
- Community mapping



ASSESSMENT TIPS

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- Be receptive to new ideas or opinions.
- Include people from groups that are usually underrepresented.
- Don't promise a specific project.
- Make sure the local club is involved
- Establish how you'll collect data.
- Collaborate and learn from others.



A photograph of two young women of African descent in a library. The woman on the left, wearing a leopard-print shirt, is smiling and looking at a book held by the woman on the right. The woman on the right, wearing a blue tank top, is also smiling and looking at the book. They are standing in front of tall wooden shelves filled with colorful books. The word "RESOURCES" is overlaid in white text on the left side of the image.

RESOURCES

GRANT RESOURCES

- My Rotary
- A Guide to Global Grants
- The Learning Center
- Area of Focus guidelines
- District Rotary Foundation committee
- RI Rotary grants staff



DISTRICT RESOURCE NETWORKS

District resource networks

are like a consulting firm of Rotary experts. Rather than spending money to hire temporary consultants, you can get advice from Rotary members who use their technical skills and experience to help clubs develop projects.



Contact your District International Service Chair (DISC) or the Global Grants Chair to connect to a member of the district resource network.

THE CADRE OF TECHNICAL ADVISERS AND ROTARY ACTION GROUPS

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- **The Cadre** consists of Rotary members with professional expertise in our areas of focus and in financial auditing.
- **Rotary Action Groups** include members around the world with expertise in a specific topic. They can help you:
 - Understand Rotary's areas of focus
 - Plan community assessments
 - Design and implement your project
 - Incorporate elements of sustainability
 - Establish monitoring and evaluation plans



HOW TO FIND PARTNERS

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- The Service Project Center
- Rotary Action Groups
- Intercountry Committees (ICC)
- Project fairs
- Rotary Fellowships
- District International Service Chair Pat Patton



ROTARACT PARTICIPATION

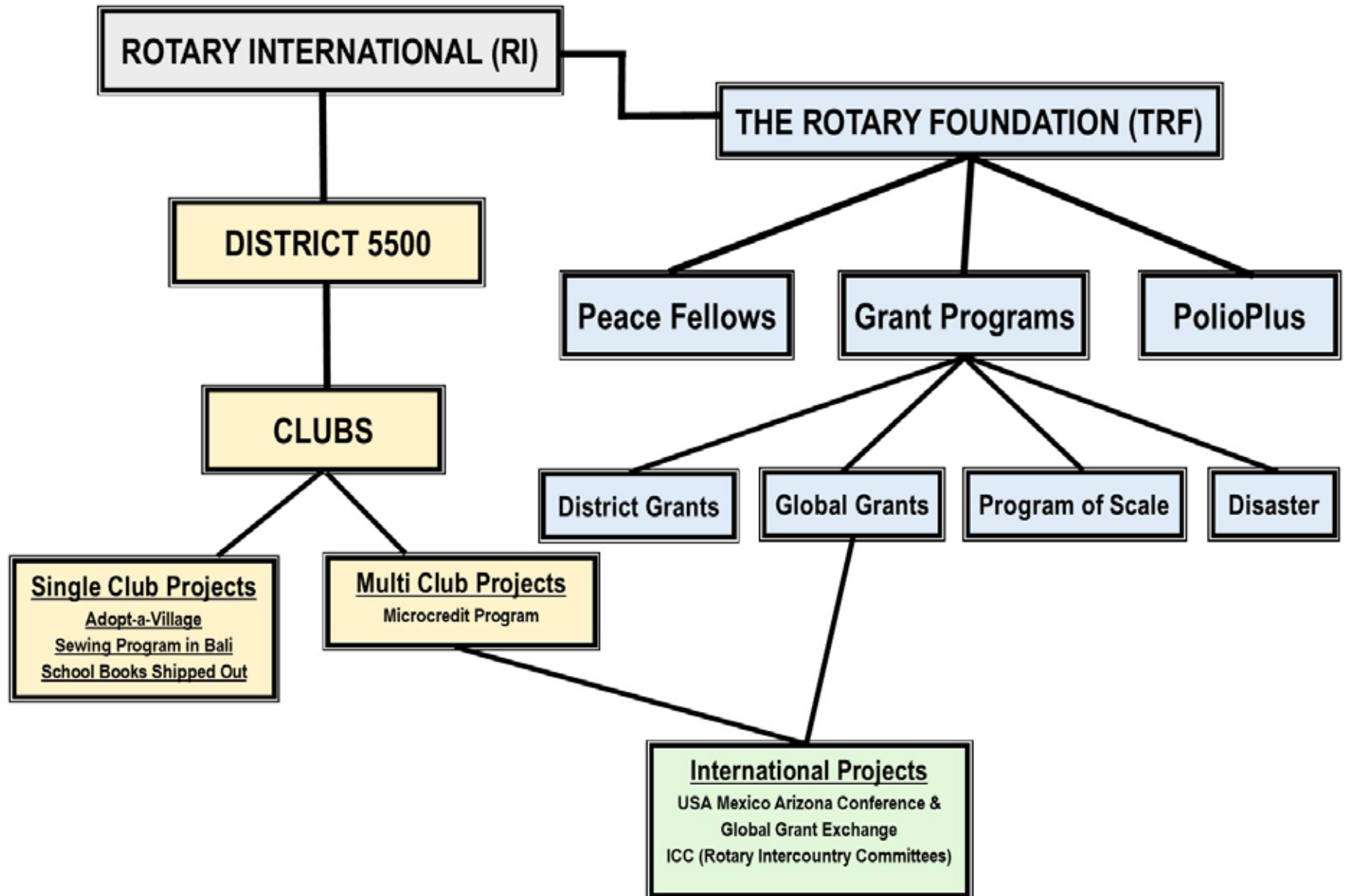
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- Rotaract clubs can be included in district grant spending plans & projects.
- Rotaract clubs can apply for global grants if they:
 - Have prior experience with global grants
 - Have completed the qualification process
 - Have a Rotary club as the other sponsor

We suggest that Rotaract clubs start with district grants and then move to global grants.



One More Look at Creating Service Projects



QUESTIONS