

DISTRICT 7620

TRF LEARNING SERIES CHAPTER IV

PREPARE TO APPLY FOR A GLOBAL GRANT



Get to Know and Collaborate with Your District 7620 Foundation Leadership Team

PDG Rich Glover
District Rotary Foundation Chair
2019-2022



DG Dr. Geetha Jayaram
District Rotary Foundation Chair-
Elect
2022-2025



Barbara J. Chamberlain-Skinner, Esq.
District Rotary Foundation
Grants Committee Chair
2021-2024



DRFC QUICK REVIEW FROM LAST WEEK

- This is



- **Cultural Change – Evidence Based Practice**
 - Training
 - Giving and grant culture
 - Discover the Art of Giving
- **Annual Fund is the Engine to support Community & Global Grants**
 - Follow the money
- **MOU**
 - Reviewed, signed & send to DRFC

This is



SO WE SET SOME POWERFUL OBJECTIVES BASED ON 3 YEARS OF EVIDENCE BASED PRACICE

- ✓ **Establish standard benchmarks in your foundation education**
- ✓ **Review the many options in the art of giving to The Rotary Foundation**
 - ✓ **Inspiring an ongoing legacy of a giving and grant culture**
 - ✓ **Expand partnerships in all grants to leverage impact**

July 01, 2022 – June 30, 2025



REVISED SCHEDULE: EIGHT-PART 2022 TRF LEARNING SERIES

EVERY THURSDAY & SATURDAY
BEGINNING **FEBRUARY 10, 2022**

ALL DISTRICT MEMBERS ARE WELCOME.



MANDATORY FOR MOU #II, III, IV FOR PRESIDENT-ELECT, CLUB TRF CHAIR



Part II - Learning the Mechanics of The Rotary Foundation; Learn how the TRF works and why it is the "Engine" that drives our districts giving

- Thursday, February 10 @ 7:00 – 8:00 pm, *and*
- Saturday, February 12 @ 9:00 – 10:00 am



Part III – Be Prepared to Apply for District Grants; Learn about the Memorandum of Understanding (MOU) for community and global grants eligibility, where do we apply, easy steps of the application, and how do we get funded.

- Thursday, February 17 @ 7:00 – 8:00 pm, *and*
- Saturday, February 19 @ 9:00 – 10:00 am



Part IV – Be Prepared to Apply for Global Grants; Learn about the where and how do we apply, easy steps of the application tips, and how do we get funded.

- Thursday, February 24 @ 7:00 – 8:00 pm, *and*
- Saturday, February 26 @ 9:00 – 10:00 am

Part I – Learn the 105 years History of The Rotary Foundation;

Learn about the humble beginnings in 1917 to today as one of the most highly respected foundations in the world.

- Thursday, March 10 @ 7:00 – 8:00 pm *and*
- Saturday, March 12 @ 9:00 – 10:00 am

Part V - Paul Harris Fellow vs. Paul Harris Society: "Why is the Difference so Significant?"

- Thursday, March 17 @ 7:00 – 8:00 pm, *and*
- Saturday, March 19 @ 9:00 – 10:00 am

Part VI - PolioPlus; "We are that close" to eradication of Polio in the world. And what is the "Plus"?

- Thursday, March 24 @ 7:00 – 8:00 pm, *and*
- Saturday, March 26 @ 9:00 – 10:00 am

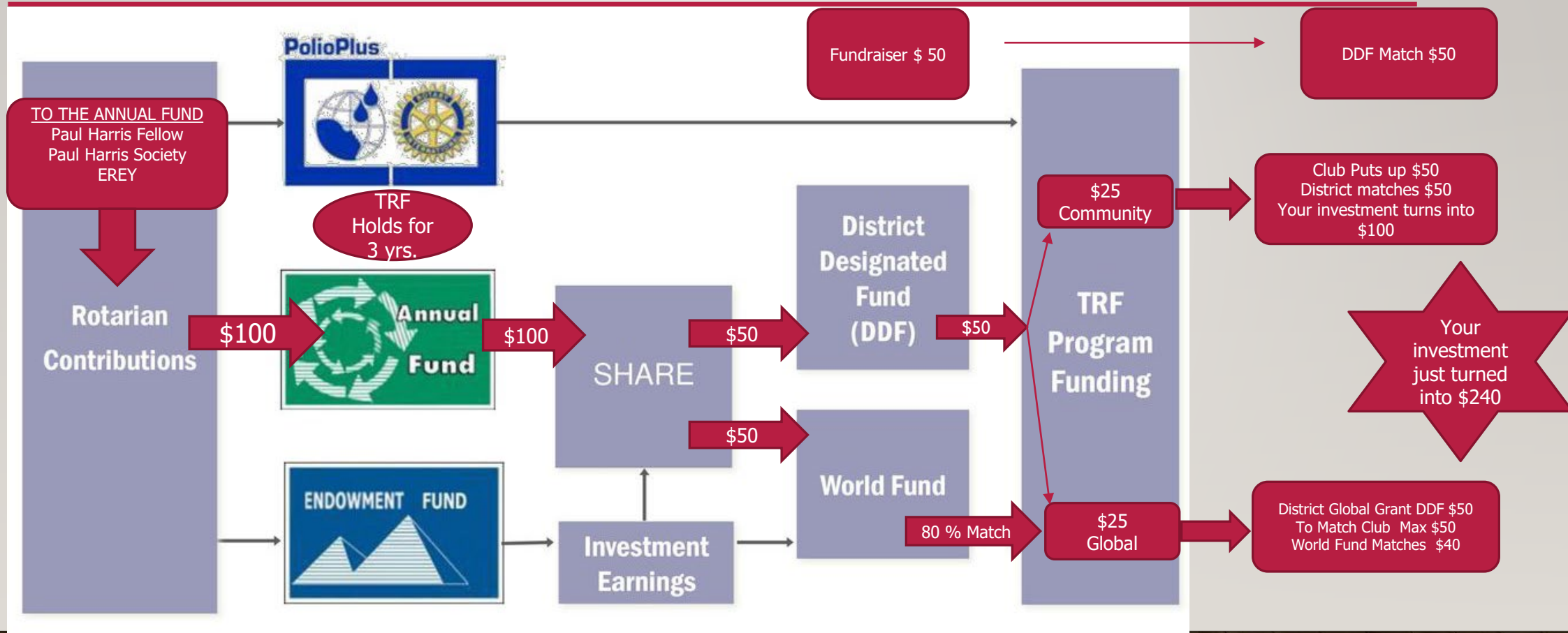
Part VII - Your Legacy; Rotary's Promise: Learn the many ways to establish your own legacy in support of The Rotary Foundation

- Thursday, March 31 @ 7:00 – 8:00 pm, *and*
- Saturday, April 02 @ 9:00 – 10:00 am

Part VIII - Other Programs - Make-ups, specific topic, club presentations and special requests (Dates to be determined):

Encourage requested presentations – Contact PDG Rich Glover, DRFC at 18.19.dg7620@qlovercrew.net to schedule.

THE ANNUAL FUND IS THE **ENGINE** THAT DRIVES OUR DISTRICT GRANT GIVING





Rotary District 7620 Memorandum of Understanding **2022-2023**

This Memorandum of Understanding (MOU) is an agreement between Rotary International District 7620 (District 7620) and District 7620 Rotary Club of _____

_____ (Grant Applicant)

Eligibility

_____ apply for community and / or global District Designated Funds (DDF) from The Rotary Foundation (TRF). This MOU sets forth the measures the Grant Applicant will undertake to ensure proper implementation of grant activities and management of awarded funds. By signing this document, the Grant Applicant agrees that it will comply with all District 7620 requirements.

1. Terms of Qualification

Upon successful completion of the grant qualification requirements, the Grant Applicant will receive qualified status for a one-year period: July 1, 2022-June 30, 2023.

By entering into this Agreement and receiving DDF, the Grant Applicant understands and confirms that it is responsible for the use of the grant funds.

Initial RBG / ____ / ____

PE & TRF Chair

Please welcome

DG Dr. Geetha Jayaram
District 7620 Rotary Foundation Chair – Elect
2022 - 2025



Geetha Jayaram, MD

DG QUICK REVIEW FROM LAST WEEK



-
- **MOU - Purpose & Intent**
 - **MOU - Understanding**
 - **MOU – Eligibility requirements**

PURPOSE AND INTENT

DISTRICT 7620

MEMORANDUM OF UNDERSTANDING

- ✓ A memorandum of understanding (MOU) is a document that **describes the broad outlines of an agreement that two or more parties have reached.**
- ✓ MOUs communicate the mutually accepted expectations of all of the parties involved in a negotiation.
- ✓ While not legally binding, the MOU signals that a binding contract is imminent.

MEMORANDUM OF UNDERSTANDING

- MOU is a stand-alone document and available on the District 7620 web site under the **Foundation** tab
- Read very carefully to all MOU compliance statements
- Each Club must have a Club Rotary Foundation Chair.
- Both Club President and Club Rotary Foundation Chair must initial each page (lower right).
- Scan and send entire MOU document with officer signatures by email to the District Rotary Foundation Chair (DRFC) **not later than** date stamped 5:00pm EST, Friday, March 25, 2022. No exceptions.
- Any questions are welcome by PDG Rich by email 18.19.dg7620@glovercrew.net
with cc to DG Geetha: districtgovernor2122@gmail.com

Please Welcome

District Foundation Grants Chair

BJ Skinner

2020 - 2023



Barbara J. Chamberlain-Skinner, Esq.

GRANTS CHAIR QUICK REVIEW FROM LAST WEEK

- **Foundation Design & Principals**
- **Criteria for writing quality grants**
- **Our Objectives**
 - **Specific - Attainable – Relevant**
 - **Sustainability**
 - **Measurability**
 - **Impactful**



OUR ROTARY FOUNDATION DESIGN AND PRINCIPALS

- In 1917, Arch Klumph had the fortitude, vision and determination to establish a balanced Rotarian giving model with 3 avenues to support their world vision along with our Founder Paul Harris.
- Rotarians giving of their time, wisdom and wealth is precious:
 - Option 1 – funding stream in the event a world sentinel event requires a world mobilization of RI members,
 - Option 2 – funding to support projects and service to meet the **needs of today**, and
 - Option 3 – funds created in a trust where Rotarian contributions principal were never spent and would provide spendable earnings that grow in market value thus grow spendable **earnings forever**.

CRITERIA GUIDELINES

WRITE QUALITY GRANTS

- ✓ Clear Objective
- ✓ Clear Principles of Sustainability
- ✓ Clear how objects are you Measured
- ✓ How is the outcome Determined Impactful

OUR OBJECTIVES

Is it specific * Is it attainable * Is it relevant *

- Strengthen impact of club project(s)
- Encourage clubs to work together
- Encourage partnerships with community organizations
- Encourage Creative Innovation
- Advance understanding of The Rotary Foundation's work
- Enhance Rotary's public image
- It is not time-lined

PRINCIPLES OF SUSTAINABILITY

- *Impact after foundation funding is expended*
- *Creates regional input and local knowledge*
- *Respect for the environment & natural resources*
- *Reach impactful beneficiaries to succeed beyond*
- *Use innovative methods*
- *Significantly demonstrate effectiveness of the beneficiaries.*

OUR PLAN WILL BE MEASURABLE

“How it will be measured needs to be started” - Unknown

- Clearly identify **how** you will know objective(s) are accomplished
- Always strive for **quality**
- Often defined in **quantity**
- Assure project is **attainable** - funding, manpower, and authority to accomplish
- Assure the project is **relevant** - Are there factors beyond your control
- Add specific language to **specify** completion time.

HOW IS THE OUTCOME DETERMINED IMPACTFUL

- TRF is interested in *proof of impact*. To evaluate whether time, money, and efforts are making a difference.
- Often a community indicators are well-being or program performance metric – Program-level and population level.
- Are we turning the **curve** – beating the data baseline ?
- Understand the *type* and *quantity* of impact we are making helps us figure out what's working to change our communities and what needs to be improved.
- Claims about making a difference are no longer sufficient; **evidence** of how much difference you're making is now required.

Please Welcome Back

District Rotary Foundation Chair

PDG Rich



PDG Richard B. Glover, DRFC



LET'S GET STARTED



Every year Millions of Dollars are Given Away

Chronicle of Philanthropy (11/21) rates us **#66**

of the worlds **Top 100** largest Public Charities by **Annual** Donations



BE PREPARED TO FILL OUT THE GLOBAL APPLICATION

- Have your club partners identified and establish the “lead Club.” **required.**
- Have International Rotary Club host that serves the area you will impact **required.**
- Have the Community Assessment documents for service area to download **required.**
- Have the grant funding committed (review Funding Grid requirements) **required.**
- Establish banking account for grant funds **required.**
- Review Finance Transparency Policy (page 30-34 Guide to Global Grants) **required.**

**There will be instructions and recommendations
within the application to guide you)**



TRF CHANGES EFFECTIVE JULY 01, 2021

HIGH DEMAND FOR GLOBAL GRANTS IS FAR EXCEEDING AND OUTPACING THE GROWTH IN ANNUAL FUND CONTRIBUTIONS.

THE ROTARY YEAR 2021-2022, TRF IS TAKING SEVERAL COST-SAVING MEASURES IN AN EFFORT TO FUND MORE GLOBAL GRANTS.

- District Designated Fund (DDF) contributions transferred to PolioPlus will be reduced in matched to 50%.
 - ❑ E.g. - DDF DG Pledges of \$20,000, WF match is \$10,000 (50%) = \$30,000.
 - ❑ Gates Foundation still matches 2:1 on \$30,000 for total of \$90k to Polio Plus Eradication Program.
- World Fund match of DDF will be reduced to 80% when being used for global grants.
- Annual Fund-SHARE contributions will have a new 5% reduction taken equally (2.5%) from the World Fund and DDF to help fund operating expenses.
- The ability to roll over unused DDF-Share will be limited to five years then will be applied at the district's discretion to PolioPlus, area of focus Endowment funds, the general Endowment Fund (including the Rotary Peace Centers), the Disaster Response Fund, or the World Fund. The first DDF rollover redirection will take place 1 July 2026.

YOUR INTERNATIONAL GRANT CONTACT



ROTARY GRANTS

Staff contact sheet

The table below lists the Rotary grants staff contact for each district. Contact the staff person for the district where the grant activity will take place or, in the case of global grant scholarships, where the scholar candidate originates from. Districts listed are effective 1 July 2020. See page 16 for staff information.

7620	USA	Renée Reiling	847-866-3314
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District Global Funds available Mid July 2022:

- ✓ Be prepared to Apply for a Global grant
- ✓ Where do clubs go to apply



DISTRICT 7620 FUNDRAISING ANALYSIS

INTERIM RESULTS FOR JULY THROUGH FEBRUARY 2021-22

DG	PDG	DRFC	Rotary Year	Number of Members	Annual Fund Total	Annual Fund Per Cap	Non-Giving Clubs	Other Funds** Total	Endowment Fund Totals	District Total Giving	\$Community DDF-share	\$Global World DDF-Share	DRFC
CP	GJ	RG	# 2021-22	2,001	\$307,178	\$153.51	7	\$200,187	\$351,245	\$904,334	\$76,794.50	\$76,666.88	RG
DEH	JG	RG	2020-21	2,068	\$428,649	\$207.28	4	\$215,700	\$202,898	\$921,177	\$107,162.33	\$107,162.33	RG
SM	BG	RG	2019-20	2,131	\$352,335	\$165.34	7	\$385,457	\$239,141	\$1,076,767	\$88,083.85	\$88,083.85	RG
GJ	RG	AK	2018-19	2,181	\$322,739	\$147.98	0	\$76,165	\$165,509	\$646,102	\$80,684.82	\$80,684.82	AK
BG	GW	AK	2017-18	2,164	\$342,355	\$158.20	0	\$100,750	\$33,822	\$564,563	\$85,588.66	\$85,588.66	AK

Current as of 2/16/22

** Other Funds include term/directed gifts and funds for approved grants

\$ Does not include Endow Spendable earnings

CHART TO ESTIMATE GLOBAL DDF MATCH AND CASH

Global Grant Funding Grid

(Minimum of \$30,000 total to qualify)

(Maximum Global DDF match is 15% (\$11,700) to any one club)

<u>Source</u>	<u>Combination</u>	<u>Combination</u>	<u>Combination</u>	<u>Combination</u>	<u>Combination</u>	<u>Multiple Clubs Combination</u>	<u>Multiple Clubs Combination</u>
District DDF Global	\$5,000	\$7,000	\$8,000	\$9,000	\$10,000	\$13,000	\$15,000
World Fund Match (80%)	\$4,000	\$5,600	\$6,400	\$7,200	\$8,000	\$10,400	\$12,000
Club Cash	\$10,000	\$14,000	\$16,000	\$18,000	\$20,000	\$25,000	\$25,000
	\$19,000	\$26,600	\$30,400	\$34,200	\$38,000	\$48,400	\$52,000
	short	short	over-good	Over - better	Now real money	Now see it grow	And Grow

Three clubs request \$2,666.67 DDF-Share Global (= \$8,000)

\$8,000.00

Three equal club cash contribution of \$5,333.33 (= \$16,000)

\$16,000.00

World Fund matched @ 80% = \$6,400

\$6,400.00

\$30,000 grant

\$30,400.00

OK, LET'S GET STARTED TO APPLY FOR A AL GLOBAL GRANT

[HTTPS://MY.ROTARY.ORG/](https://my.rotary.org/)

The image shows a two-part process. On the left, a Google search bar contains the text "My Rotary.org". A red arrow points to the search bar. Below the search bar, the website's header is visible, featuring the Rotary logo, "My Rotary" text, and buttons for "Donate" and "Join". A red arrow points to the "Sign In" link in the top right corner of the header. On the right, a sign-in form is displayed. A red arrow points to the "Sign In" text above the form. The form includes fields for "Username" (with the value "rich@glovercrew.net") and "Password" (masked with dots). There is a "Remember me" checkbox which is checked, and a blue "Sign In" button at the bottom of the form. A link for "Need help signing in?" is located below the button.

Donate

Join



Apply for Grants



District Grants

Give



Global Grants

Raise for Rotary

Programs of Scale Grants

About

Grant Center

Foundation Reports

History





District Number: 7620

District Status: ✔ Qualified

RESOURCES



Rotary Grant Center

Welcome to Rotary grants! As Rotary members, we contribute our skills, expertise, and resources to solve some of the world's most serious problems. From providing clean water in local communities to promoting peace worldwide, Rotary grants can bring your project ideas to life.

Use the Grant Center to apply for a grant, track its progress, report on it, and search for other grants in your district.



District Number: 7620

District Status:  Qualified

RESOURCES



Apply for a Grant

The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training teams.

Apply Now

Begin the grant application only after your club or district and partners have finalized the project plan and you've contacted your district about your project's need for funding. Answer every question clearly and concisely. Your regional grants officer will work with you to make any changes your application needs in order to meet grant criteria.

Choose the type of grant you're applying for:

Global Grant

Let's begin!

Global Grants

Global grants fund large international humanitarian projects, scholarships, and vocational training teams that have sustainable and measurable results in one or more of Rotary's areas of focus.




- ▶ The application asks about your grant's objectives, participants, sustainability, budget, and financing.
- ▶ Make sure that the grant falls within Rotary's global grant guidelines, is technically feasible, your and your partner club are qualified to address this need, and issues aren't already being addressed by another organization.



Global Grant Application

All fields are required unless noted as "optional".



Step 1: Basic Information

Enter some basic information, and then we'll give your application a number.

What's the name of your project?

100/100 characters

What type of project are you planning?

Check all that apply. This will tell us what else we need to ask you.



A humanitarian project

Address community needs and produce sustainable, measurable outcomes

Vocational training

Build skills within a community by supporting a team of professionals that will travel abroad to train or learn from colleagues in the community they visit

A scholarship

Fund international graduate-level study by someone seeking a career within an area of focus

GRANT INFORMATION

GRANT NUMBER

...

GRANT STATUS


...

LAST ACTIVITY

19/01/2021

Select the primary host and international contacts for this project. ?

Name	Club	District	Sponsor	Role
+ Add Primary Contact		<input checked="" type="checkbox"/> Notify Primary Contact		

 [Switch host, international contacts, and committees.](#)

[Save & Continue](#) [Save](#) [Exit](#)

Step 2: Committee Members

Step 3: Project Overview

Step 4: Areas of Focus

Step 5: Measuring Success

Step 6: Location and Dates

Step 7: Participants

Step 8: Budget

Step 9: Funding

Step 10: Sustainability

Supporting Documents

Finalize & Submit

Step 11: Review and Lock

Step 12: Authorizations

Save & Continue

Save

Exit

Step 2: Committee Members



Step 3: Project Overview ✓



Step 4: Areas of Focus ✓



Step 5: Measuring Success ✓



Step 6: Location and Dates ✓



Step 7: Participants



Step 8: Budget ✓



Step 9: Funding



Step 10: Sustainability

Supporting Documents ✓



Finalize & Submit

Step 11: Review and Lock

Step 12: Authorizations



District Number: 7620

District Status: Qualified

RESOURCES



Apply for a Grant

The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training teams.

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Begin the grant application only after your club or district and partners have finalized the project plan and you've contacted your district about your project's need for funding. Answer every question clearly and concisely. Your regional grants officer will work with you to make any changes your application needs in order to meet grant criteria.

District Number: 7620

District Status: ✔ Qualified

My Grants

Here's an overview of all the Rotary grants you're involved in.

Draft

Filter:

Grant Number ↕	Grant Title ↕	Date Created ↕	Last Activity ↕	
GG2120846	A. Robertson Global Grant Scholarship	06/11/2020	10/01/2021	✕ Delete
GG2120048	RCM Elimika Rotary-GPE Project	12/10/2020	07/01/2021	✕ Delete
GG2001173	COVID - 19 Sustainable Health and Livelihood for Internally Displace...	18/03/2020	03/01/2021	✕ Delete
GG1990967	Windows to Knowledge (W2K)	16/06/2019	11/01/2021	

My Grants

Here's an overview of all the Rotary grants you're involved in.

Authorization Required

Filter:

Grant Number ↕	Grant Title ↕	Date Created ↕	Last Activity ↕
GG2015956	Clean Water Supply System, Villa Nizao Community, Municipality of ...	18/06/2020	16/01/2021
GG1989340	Melka Oba Ethiopia Water Project	09/05/2019	15/01/2021
GG1860936	Khwaja Mohammad Koohi School	18/07/2017	08/01/2021
GG1983177	Cervical Cancer Treatment for Tanzanian Women (CERTAN)	26/11/2018	08/01/2021

Submitted

Filter:

Grant Number ↕	Grant Title ↕	Date Created ↕	Submitted on ↕
GG2096256	All children deserve to be treated in a modest way	25/10/2019	14/01/2021
GG2121640	Global Grant Scholarship for Kei Kudo	01/12/2020	11/01/2021
GG2119733	Aminata Seck Scholarship	01/10/2020	07/01/2021
GG1988824	Maanasi Global - Mental health care delivery, Bungoma County, Ken...	29/04/2019	04/01/2021
GG2016389	RC-Vizianagaram Central - Community Safe Drinking Water - R.O.Pla...	25/06/2020	30/06/2020

My Grants

Here's an overview of all the Rotary grants you're involved in.

Approved

Filter:

Grant Number ↕	Grant Title ↕	Date Approved ↕	Payment Status ↕	Report Due ↕	
DG2113183	District 7620 (2020-21)	16/07/2020	Paid	30/07/2021	Reports
GG1988673	Jaclyn M Grace Scholarship	11/06/2019	Paid		Reports
GG2091778	Water and Sanitation for communities in Santa Lucía Utatlan and Sa...	01/07/2020	Partially Paid	07/10/2021	Reports
GG1524153	Women in Agriculture in Ethiopia	06/10/2015	Paid	13/08/2019	Reports
GG1525375	Blood Bank and Blood Donation Van at Jawhar	22/01/2015	Paid		Reports
GG1528549	A National Program to alleviate corneal blindness in Bangladesh	23/02/2017	Paid	11/07/2020	Reports
GG1743565	Suicide prevention model and its application in the municipalities of...	07/06/2018	Paid		Reports
GG1744166	Water and Sanitation for Purulia, India (WASPUR)	31/10/2016	Paid	31/05/2021	Reports
GG1745928	SAFE WATER FOR PROVINCIAL SCHOOLS Phase I	19/03/2018	Paid	20/08/2021	Reports
GG1748434	Amputee Rehabilitation Project	08/06/2017	Paid	31/05/2021	Reports
GG1755224	Enhancing Education Quality for Girls in SPCW/K Trust school in Ban	16/07/2018	Paid	31/05/2021	Reports

A GUIDE TO GLOBAL GRANTS



TAKE ACTION: rotary.org/grants

FINANCIAL TRANSPARENCY

(page 30-34 Guide to Global Grants)

Open a bank account

Follow local laws

Transfer and disbursement of funds

Keep financial records

Retain documents

Keep documents for your records

Track inventory

Reviews, Visits and Audits

POINTS TO REMEMBER

*DISTRICT 7620 CENTRAL MD & DC ENDOWMENT FUND:
LEAVING A LEGACY - SERVING HUMANITY FOREVER*

QUESTIONS?

PDG Rich Glover,
District Rotary Foundation Chair
Cell: (301) 980-4976
Email: 18.19.dg7620@glovercrew.net



DISTRICT DESIGNATED FUNDS (DDF) COMMUNITY & GLOBAL GRANT CRITERIA "10" MEMORANDUM OF UNDERSTANDING (MOU)

1. The Club President-Elect and Club TRF Chair are **required** to attend annual DACdb Grants Module training Parts II, III, and IV of the DRFC Learning Series, prior to March 01, 2021.
2. The Club President-Elect and club Foundation Chair are **required** to be MOU certified (President & Club TRF Chair).
3. The District and Club Data Base (**DACdb**) is **required** to submit and manage a district grant, no exceptions.
- 4. **\$120** per capita minimum of club membership total giving to the Annual Fund.
- 5. **50%** of club members contribute **\$25** to the Annual Fund.
- 6. **50%** of club members are a Paul Harris Fellow.
- 7. **\$5,000** maximum DDF Match per eligible club
8. **15%** is the maximum grant award to any one club of the total District DDF community Grant fund.
9. District community grant projects are **required** to be complete, submitted and approved "Final Report" by the DRFC no later than May 30, 2022.
10. Ensure that all grant activities are in accordance with local laws.

FINAL: February 17, 2021 1500 hrs.

ATTENTION PLEASE

- Welcome to our TRF Learning Series Part IV Global Grants !
- We have a large attendance today so we request that everyone please **mute your Zoom** for today's presentation.
- Please use the **CHAT** icon to place your questions or clarification
- The presentation usually has 15 minutes allotted for of Q&A, however, due to the recent TRF Trustee Chair Policy changes, we may have less time.
- I will stay after the promised 1 hour limit on all the Learning Series if you wish to stay connected for live Q&A.
- **IF YOU DID NOT PRE-REGISTER, PUT YOUR NAME, POSITION AND CLUB IN THE CHAT BOX SO YOU RECEIVE ATTENDANCE CREDIT FOR MOU GRANT ELIGIBILITY.**