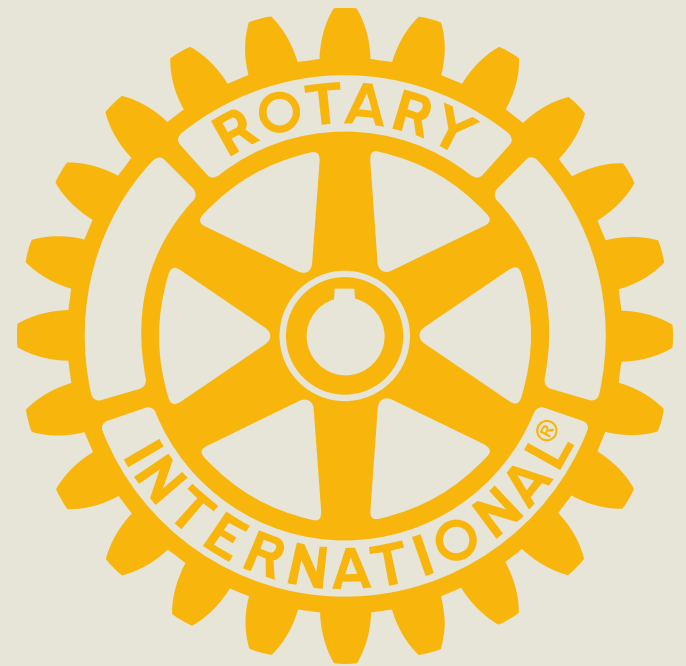


The  
**Rotary**  
Foundation



TRF is  
ROTARY'S Way of  
**DOING GOOD IN THE WORLD**



EVERY  
ROTARIAN  
EVERY  
YEAR

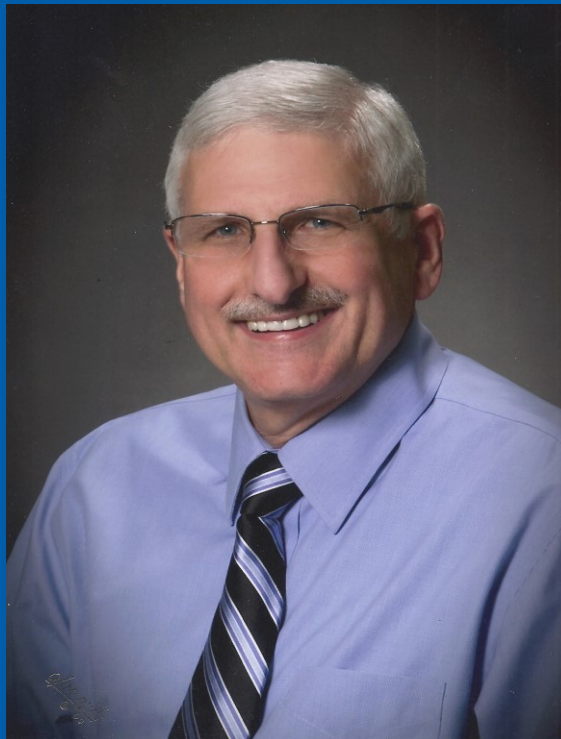


**CREATE HOPE**  
in the **WORLD**

# Global Grants, What You Need to Know

John Davis

Dist 7670 Grants /Global Grants Chair  
coljohnret@gmail.com



GMS 4 March 2023

# The Quiz

**When you find out what  
you don't know!!!!**

**Then you can learn what  
you NEED to Know!!!**

# Goals of Presentation

## Answer 5 Questions:

1. What is a Global Grant
2. What are the 3 types of Global Grants
3. What are the basic considerations
4. How Can Your Club Participate
5. What's Important

# Grant Process

- ▶ **Global grants** support large international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus. They range from \$30,000 to \$400,000.
- ▶ **District grants** fund smaller-scale, short-term projects that address immediate needs in your community or abroad. **John Dewitt/Judy Chapman** is the chair of the **DISTRICT GRANT COMMITTEE!!**

## The lifecycle of a Rotary grant



## District qualification



# Three Types of Global Grants

## Humanitarian project

Address community needs and produce sustainable, measurable outcomes

**Water and Sanitation construction projects, medical equip, rehab structures, educational equipment, furnishings (limited), etc.**

## Vocational Training Teams

Build skills within a community by sending teams of professionals that will travel abroad to train or learn from host country they visit

**Medical Teams (doctors, dentist, nurses)**

**School Teachers exchange**

## Scholarship Programs

**The easiest to write, fund & administer**

Fund international graduate-level study for a career within an Area of Focus



Rotary

# A Global Grant Is

- Large, International project, value at least **\$30,000**
- Must have a Partnership with an overseas club and/or district
- A **Host club** where the project occurs **and the international club**
- Responds to Community Needs & requires a Community Assessment
- Align with one Rotary Area of Focus
- **Longterm**, Measurable, Sustainable Outcome
  - **Three sources of funds: Club, DDF & World Fund 80% match of DDF**
  - Timing- Flexible, multi-year, no deadline



# First Consideration- Community Needs Assessment

**Document the Need** - Humanitarian and VTT applications are required to formally document the need! GG Scholarships do not require a Community Assessment

- Describes Beneficiary Community
- Demographics
- Who conducted assessment
- Methods
- Community Participants
- The need your project addresses
  - What is their need, not our perception of need? i.e. Toxic Charity
- Project's primary goal and how to accomplish
- Challenges
- Documented results are uploaded in your grant application



**District grant funds may be used to fund assessment site visit**



# The Project Must be Sustainable

**Sustainability** – Giving a community the skills, knowledge and means to maintain project outcome for the long-term, after Rotary leaves

- Locally sourced materials and products
- Easy to maintain
- Training
- Timely Repairability & Affordable

**Don't create *toxic charity***



Nigeria - abandoned water well after 5 years due to lack of community maintenance

# Rotary Areas of Focus

## Your grant must meet Rotary Area of Focus criteria

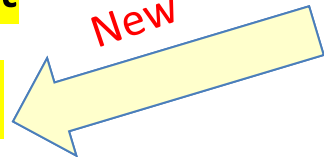
The area of focus guidelines (question #8) explain the goals for each cause, list the kinds of projects that are commonly funded, and specify the activities that are eligible for global grant support. Read more about each one to ensure that your grant fits within one of the areas of focus.

- Peace and Conflict Prevention/Resolution
- Disease Prevention and Treatment
- Water and Sanitation
- Maternal and Child Health
- Basic Education and Literacy
- Economic and Community Development
- Supporting the Environment (July 2021)

Rotary



New










# Rotary Areas of Focus Staff



## AREAS OF FOCUS STAFF

Areas of focus managers provide support and guidance for Rotarian activities in the seven areas of focus. Managers are available for consultation about project design, new initiatives, and grants.

	<p><b>Rebecca Crall</b> Peacebuilding and Conflict Prevention Manager ✉ <a href="mailto:rebecca.crall@rotary.org">rebecca.crall@rotary.org</a> 🗣 English, Spanish, basic French 🕒 Started at Rotary in 2006</p>
	<p><b>Nyreese Castro</b> Disease Prevention &amp; Treatment / Maternal &amp; Child Health Manager ✉ <a href="mailto:Nyreese.castro@rotary.org">Nyreese.castro@rotary.org</a> 🗣 English, conversational Spanish 🕒 Started at Rotary in 2021</p>
	<p><b>Mary Jo Jean-Francois</b> Basic Education and Literacy Manager ✉ <a href="mailto:maryjo.jeanfrancois@rotary.org">maryjo.jeanfrancois@rotary.org</a> 🗣 English and Haitian Creole 🕒 Started at Rotary in 2013</p>
	<p><b>Bonaventure Fandohan</b> Community Economic Development Manager ✉ <a href="mailto:bonaventure.fandohan@rotary.org">bonaventure.fandohan@rotary.org</a> 🗣 English, French and Haitian Creole 🕒 Started at Rotary in 2015</p>
	<p><b>Erica Gwynn</b> Water, Sanitation and Hygiene Manager ✉ <a href="mailto:erica.gwynn@rotary.org">erica.gwynn@rotary.org</a> 🗣 English and Spanish 🕒 Started at Rotary in 2012</p>
	<p><b>Keith Madden</b> The Environment Manager ✉ <a href="mailto:keith.madden@rotary.org">keith.madden@rotary.org</a> 🗣 English, Spanish, basic Portuguese 🕒 Started at Rotary in 2021</p>
	<p><b>Mohamed Keita</b> Area of Focus &amp; Program Communication Specialist ✉ <a href="mailto:mo.keita@rotary.org">mo.keita@rotary.org</a> 🗣 English and French Started at Rotary in 2016</p>



# GLOBAL GRANT SCHOLARSHIPS

**Must be Graduate level**

**Area of Study aligns with 1 of 7 Rotary Areas of Focus**  
**Study periods of 1-4 years**

**Selected area of focus “strongly” relates to:**

1. Previous work, volunteer, and study experience
2. Selected Academic program
3. Future career plans (immediate and long-range)

**Host and international sponsor clubs**

**\$30,000 minimum budget**



# How Can Your Club Participate

- Is your club qualified? Attended the GMS?
- Identify project, conduct needs assessment, a site visit? (**District grant funds may be used to fund assessment site visit**)
- Create strong partnership with host country club, the community and any NGO
  - Partner with other Dist 7670 clubs \$\$\$\$
- Outline your application “**Global Grant Application Template**”
  - Define project plan with clear partner roles and responsibilities, objectives and measurable outcomes in area(s) of focus
  - Define budget needs and start a funding campaign
- Your application will be reviewed/approved by the Dist. 7670 Foundation

Committee



# “We’re Here to Help”

## 2022-2023 Scholarship Grant Team members

Rick Molland (Madison County) cell: 828 450 8040

[rmolland@frontier.com](mailto:rmolland@frontier.com)

Rachel Hoskins (Franklin) cell: 828 421 2859

[rhoskins@thefranklinpress.com](mailto:rhoskins@thefranklinpress.com)

Fred Hartley (Tryon) cell: 423 341 4965

[hartleyfred46@gmail.com](mailto:hartleyfred46@gmail.com)

Jason White (Catawba Valley) cell: 828 244 1470

[whitejason17@gmail.com](mailto:whitejason17@gmail.com)

Judy Chapman (Franklin) cell: 828 371 4511 [jchapman@dnet.net](mailto:jchapman@dnet.net)

Paul Garner (Franklin) cell: 407 913 4216 [paulgarnerrotary@gmail.com](mailto:paulgarnerrotary@gmail.com)



Sarah Leatham (Hendersonville) cell: 828 606 1740

[sarahleatham@gmail.com](mailto:sarahleatham@gmail.com)

# Applying for a Global Grant

- Read !! the references found on TRF Grant Center web page sidebar
  - [A Guide to Global Grants](#)
  - [Select the Area of Focus and verify it fulfills the guidelines](#)
  - [Terms and Conditions for Rotary Foundation Grants](#)
  - [How to use the Grant Center](#)
- Use the [Global Grant Application Template](#)
- To Start the application process: **Apply Online in “My Rotary” using the Grant Center**
  - Log in <https://my.rotary.org>
    - click the Tab “Take Action”
    - then scroll down to “Apply for Grants”, and click APPLY
    - At the top of the next page click “Apply for a Grant”





Donate Join Q

HOME EXCHANGE IDEAS TAKE ACTION LEARNING & REFERENCE MANAGE THE ROTARY FOUNDATION NEWS & MEDIA MEMBER CENTER

- Give > Grant Center
- End Polio District Grants
- Raise for Rotary Global Grants
- Develop Projects > Programs of Scale Grants
- Apply for Grants > Qualification
- Empower Leaders > Grant Travel
- Disaster Response Grants
- Cadre of Technical Advisers

Date: 15 February 2021, 02:00 a.m. to 03:30 a.m.

My Rotary

The Answer to Question #15 is All of the Above!!!!



# Global grants

Rotaract clubs will soon be able to participate in district and global grants. Learn more about how Rotaract clubs can get involved and how clubs and districts can prepare, and find answers to frequently asked questions.

Global grants support large international activities with sustainable, measurable outcomes in Rotary's areas of focus. By working together to respond to real community needs, clubs and districts strengthen their global partnerships.

Read [A Guide to Global Grants](#) for detailed information on planning your project, applying for a grant to fund it, carrying it out, and reporting on your progress and outcome.

## What global grants support

Global grants can fund:

- Humanitarian projects
- Scholarships for graduate-level academic studies
- Vocational training teams, which are groups of professionals who travel abroad either to teach local professionals about their field or to learn more about it themselves

## How they're funded

Global grants have a minimum budget of \$30,000 and a maximum World Fund award of \$400,000. Grant sponsors can use a combination of District Designated Funds (DDF), cash, and/or [directed gifts and endowment earnings](#) to fund a global grant. The Foundation will provide an 80 percent World Fund match for all DDF contributions. There is no minimum World Fund match.

## Qualification

Both the district or club in the country where the activity is carried out and the international partner district or club must first become qualified before applying for a global grant. Learn more about the [qualification process](#) and [grant management](#). Your club and district Rotary Foundation chairs can help you plan how to use your

### What do you want to do?



## Experts needed to help with global grants

If you're a subject matter expert or have experience planning successful, sustainable humanitarian activities, please contact your [district international service chair](#) or district governor. Your expertise could help a club or district make a positive difference using a global grant.

## Grant Model Evaluation

The global grant model is evaluated every five years, and we're now in the second year of the current cycle. Rotary's Research and Evaluation staff produces an annual progress report for the Trustees. These findings provide the Trustees with critical information about Rotary grants so they can make data-informed decisions about the model.

Read the new [Grant Model Evaluation Year Two Report](#). Read the [first year's report](#).

Learn more about the [grant model evaluation's findings](#) from the first year of the cycle.

## Resources & reference

- [A Guide to Global Grants \(PDF\)](#)
- [Community Assessment Tools \(PDF\)](#)
- [Cooperating Organization Memorandum of Understanding \(DOC\)](#)
- [Global Grant Application Supplement for Microcredit Projects \(DOC\)](#)
- [Global Grant Application Template \(DOC\)](#)
- [Global Grant Calculator \(XLS\)](#)
- [Global Grants Community Assessment Results \(DOC\)](#)
- [Global Grant Monitoring and Evaluation Plan Supplement \(PDF\)](#)
- [Global Grant Report Supplement for Microcredit Projects \(DOC\)](#)
- [Global Grant Scholarships Supplement \(PDF\)](#)
- [How to use the Grant Center \(PDF\)](#)
- [How to use the Grant Center: Global Grant Scholars \(PDF\)](#)
- [Information for grant-funded travelers](#)
- [Lifecycle of a Project](#)
- [Six Steps to Sustainability \(PDF\)](#)
- [Terms and Conditions for Rotary Foundation District Grants and Global Grants \(PDF\)](#)
- [Training Plan for Global Grants \(DOC\)](#)
- [Vocational Training Team Itinerary \(DOC\)](#)
- [Vocational Training Team Member Application \(DOC\)](#)

## Areas of Focus resources

- [Areas of Focus Policy Statements \(PDF\)](#)
- [Basic Education and Literacy Guidelines for Global Grant Funding \(PDF\)](#)
- [Disease Prevention and Treatment Guidelines for Global Grant Funding \(PDF\)](#)
- [Economic and Community Development Guidelines for Global Grant Funding \(PDF\)](#)
- [Maternal and Child Health Guidelines for Global Grant Funding \(PDF\)](#)
- [Peace and Conflict Prevention/Resolution Guidelines for Global Grant Funding \(PDF\)](#)
- [Water and Sanitation Guidelines for Global Grant Funding \(PDF\)](#)

## Tools

- [Start your grant application](#)
- [Check out our discussion groups](#)
- [Find your Rotary grant officer \(PDF\)](#)

- Give > Grant Center
- End Polio District Grants
- Raise for Rotary Global Grants
- Develop Projects > Programs of Scale Grants
- Apply for Grants > Qualification
- Empower Leaders > Grant Travel
- Disaster Response Grants
- Cadre of Technical Advisers

Date: 18 Feburary 2021, 05:30 p.m. to 11:30 p.m.

# Qualification

## Status

Ghazi Affes has requested to be a connection. View your [pending relationship requests](#) to approve or decline.

Districts must become qualified in order to receive grant funding from The Rotary Foundation. Clubs that want to apply for [global grants](#) must also be qualified.

## What do you want to do?

I want to...

# Understanding Your Funding

## Three sources of funds:

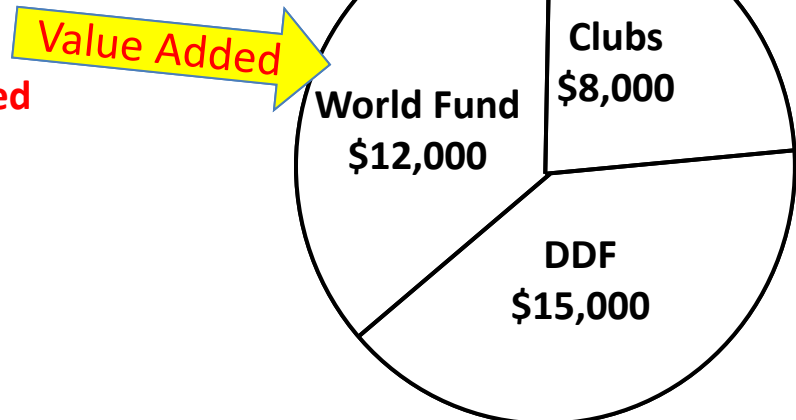
- Donor cash from clubs and individuals
- District 7670 District Designated Funds (DDF)
- Rotary Foundation **World Fund** “matching funds”

How it works: World Fund will match DDF \$1 with \$0.80

## Example

Club Cash	\$ 8,000
7670 DDF	\$ 15,000
W.F. Match	\$ 12,000
<b>Total</b>	<b>\$ 35,000</b>

**W.F. Match is calculated**  
**= \$15,000 x \$0.80**



**Note:** TRF will charge a 5% fee on all of your cash donations if sent and held at The Rotary Foundation.

# Global Grant Life Cycle

**Draft** - Partners plan project and draft application on TRF website

**Authorization** - Both Clubs and their district leaders must sign off on the application and the use of funds

**Submit** - Grant planners submit application to TRF

**TRF Approval & Payment** - TRF Regional Grants Officer (RGO) will review and approve. Then forward payment instructions and grant payment to your selected bank acct.

**Execution Phase** - Partners carry out the project

**Keep good records!**

**Reports-** Annual progress reports to TRF (Final report with in two months of completion )



# What's Important

- Needs Assessment
- Solid Partnership
- Good Planning
- Communications
- Good Stewardship
- Timely Reports

**Get to know your Regional Grants Officer at TRF**



# Good Stewardship

“Responsible and careful management of Rotary Foundation grant funds”

Did your project -

- Meet the objectives and measurable outcomes of the grant application?
- Meet the goal of the Area of Focus?
- Use grant funds according to approved budget?
- Will your project outcome be sustainable overtime?

Then provide detailed documentation and accounting data -

- Evidence of completion - project activity photos, brochures, news articles, etc
- Spreadsheet or journals summarizing line items expenditures
- Copies of receipts, purchase orders
- Bank statements, cleared checks

Submit Progress Reports with documentation to the Rotary Foundation every 12 months and final report within 2 months of completing grant.

**Dist 7670 Stewardship Committee will audit your final report before it is signed off and forwarded to TRF**



# LESSONS LEARNED

## PATIENCE

The planning and application process may take **many months**.

- TRF may challenge your project's need's assessment, sustainability, training and required partner MOU.

## UNDERSTAND

- Your host partner's culture. It will be different. They may be hesitant to act, slow to communicate (poor Internet), and have convoluted banking system. Be patient !



# Where Are The Opportunities

Partner with another Dist 7670 club

Attend \*Rotary Project Fairs - \*Note: may use Dist Grant funds.

Google : [Project fairs/ My Rotary](#)

Web Search

Google: [Rotary matching grants website](#)

Friendship Exchange Trips

Attend Rotary International Convention

Or consider sponsoring a candidate for a Rotary **Peace Fellowship** that does not cost your club or the district any money and totally funds graduate education

CONTACT **Milton Butterworth!!!!**



# If In Doubt Call Me



**John Davis**

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Ph (828) 754-3044

Cell (910) 964-0719