



Lynda Hammond
District 7980 Grants Chair

Glenn Pearson
DMG Committee Chair

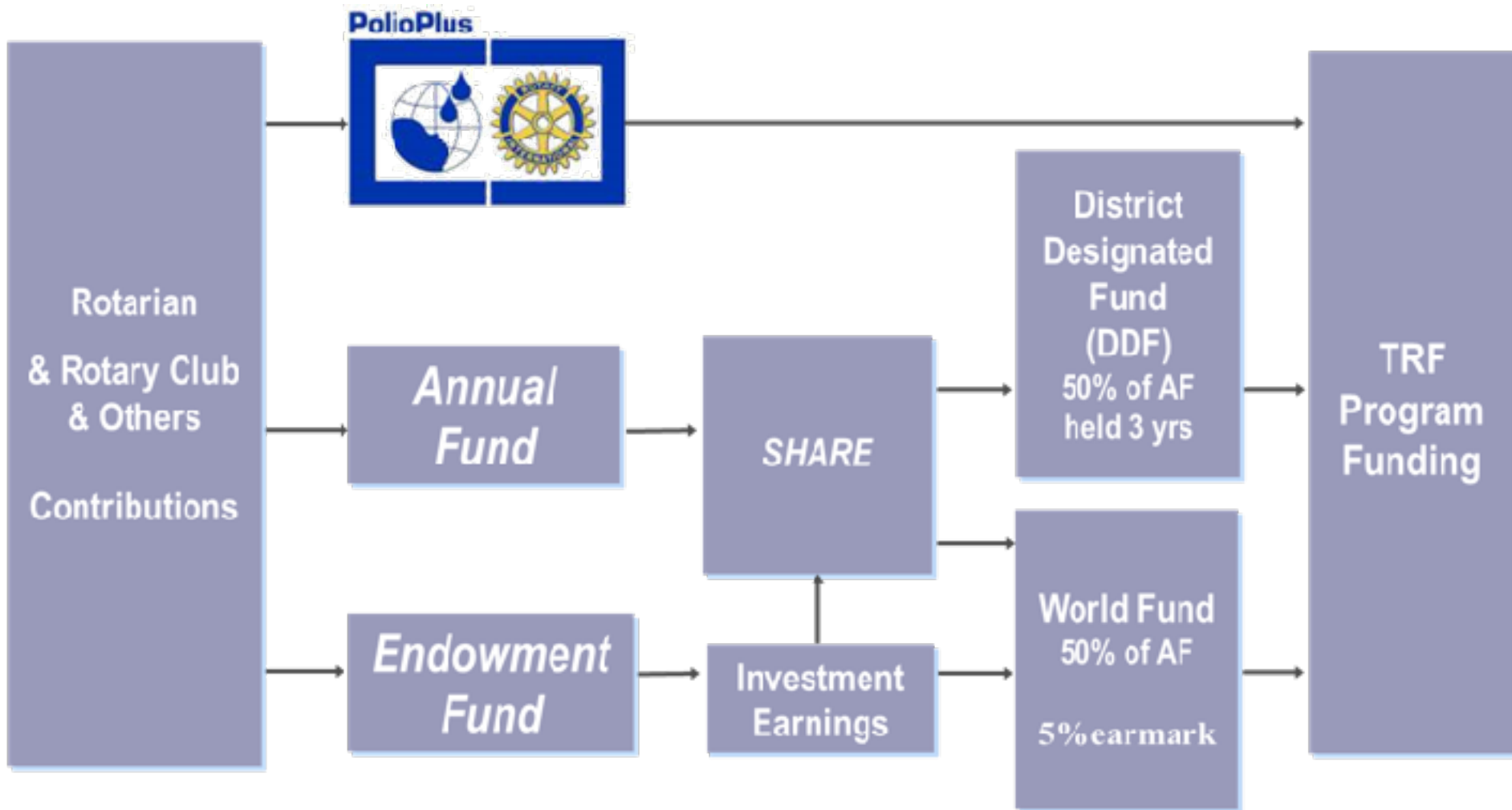
John Merkel
District Steward

Rotary Foundation Mission Statement

The mission of **The Rotary Foundation** is to enable **Rotarians** to advance world understanding, **goodwill**, and **peace** through the improvement of **health**, the support of **education** and the alleviation of **poverty**.

District TRF Grants Team 18-19

- Foundation Chair: PDG Rick Benson, Westport
- District Grants Chair: Lynda Hammond, Orange
- District Steward – John Merkel, Mystic
- District Managed Grants: Glenn Pearson, Orange
- Global Scholarship Chair – Nancy Riella, Colchester
- Peace Fellowship Chair – Nancy Riella, Colchester
- Newsletter: Lynda Hammond, Orange
- Foundation Area Reps – Jim Satterwhite, Madison



D7980 TRF Program DDF Budget 2018-19

30 District Managed Grants @\$2,500	\$74,507
24 RYLA Scholarships	\$3,000
5 World Affairs Scholarships	\$2,500
2 Global Scholarships	\$30,000
1 Vocational Training Team	\$15,000
6 Humanitarian Global Grants @\$10,000	\$65,000

The Rotary Foundation Grants



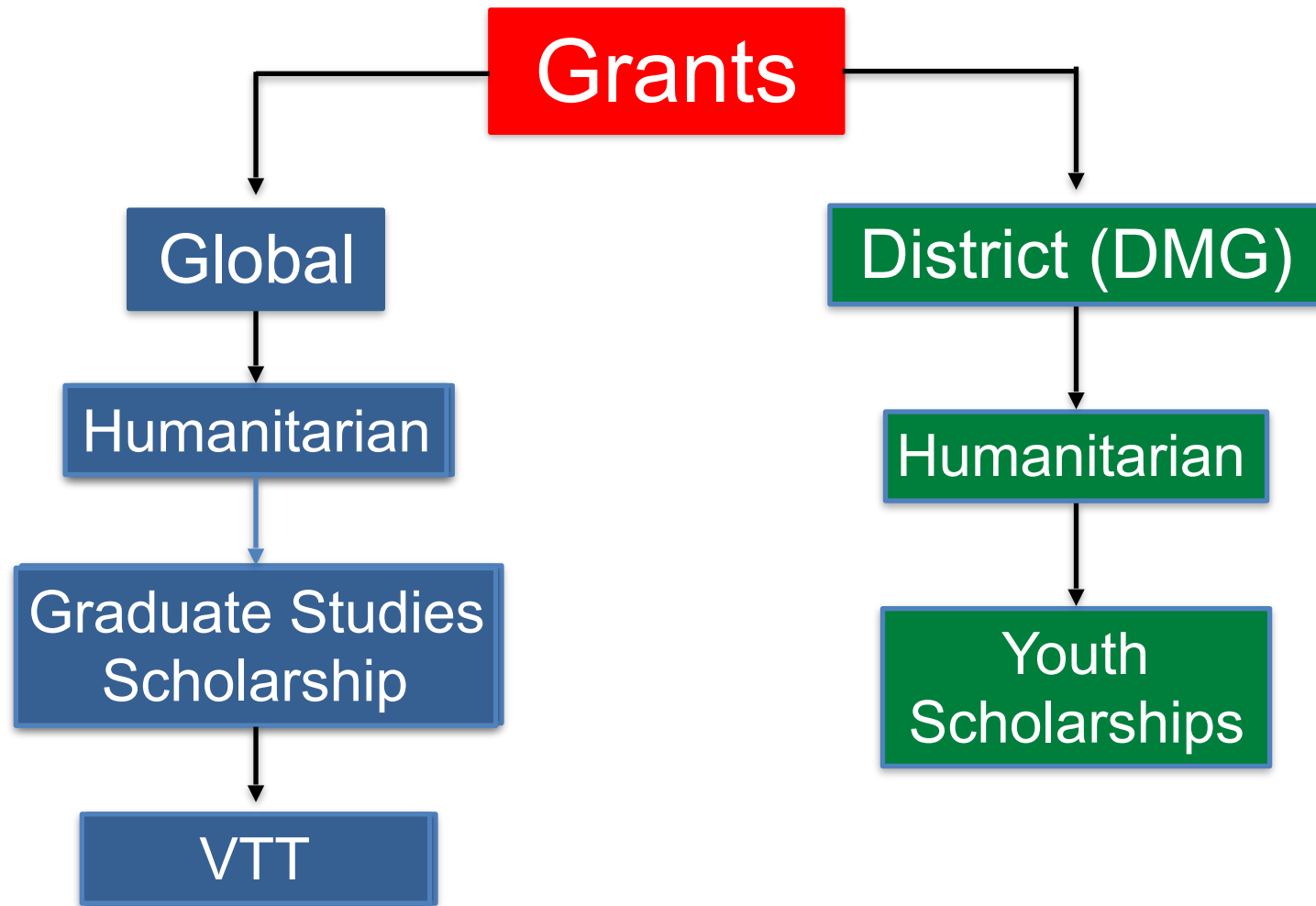
New Haven



Kenya



The Rotary Foundation Grants



Global vs District Grants

	GG	DMG
Must be in an Area of Focus	▲	▲
Community needs assessment	▲	▲
Active Rotarian participation	▲	▲
Maybe local or international	▲	▲
Benefiting community participation	▲	▲
Short-term - 1 year projects		▲
Minimum budget \$30,000	▲	
Long-term sustainable impact	▲	
Sustainable Measurable results	▲	
Separate bank account for funds	▲	

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

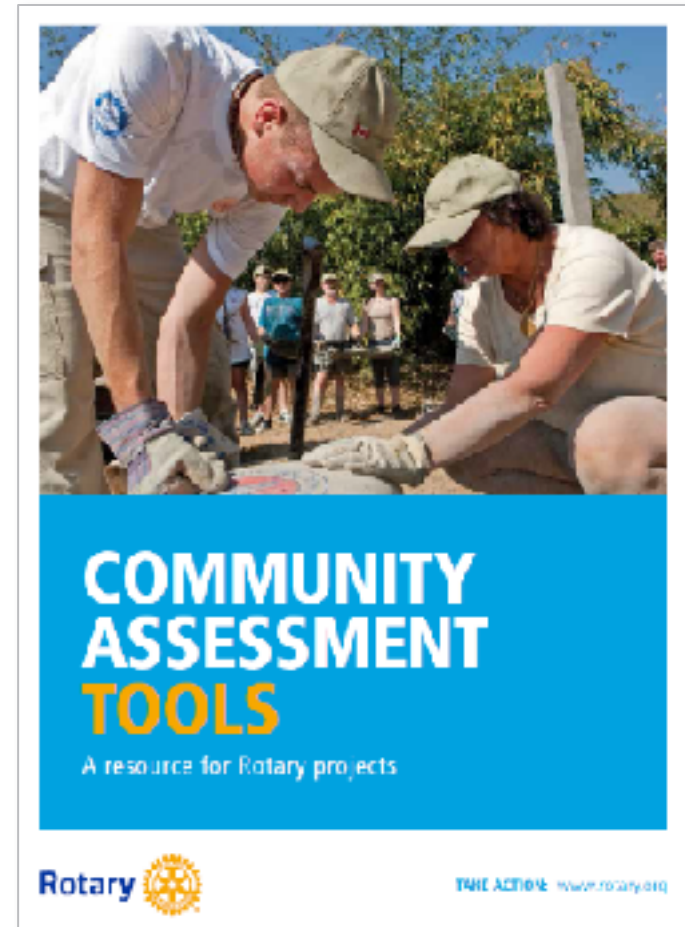
Community Needs Assessment

- Examines strengths, weaknesses, needs, assets
- Helps to identify relevant opportunities for projects



Community Assessment Tools

- Community meeting
- Survey
- Interview
- Focus group
- Asset inventory
- Community mapping



Participants

- Primary host and international sponsors (GG Only)
- Three person committee with one primary contact (GG - Host & International Sponsor)
- Conflict of Interest
- List of cooperating organizations
- Additional partners including, Rotary Clubs, Rotaract & Interact Clubs, individual Rotarians and other non-Rotarian parties.

Sustainability

Sustainability means different things to different organizations.

For Rotary, sustainability means providing long-term solutions to community needs that the beneficiaries can maintain after grant funding ends.

SUSTAINABILITY

For Rotary, sustainability means providing long-term solutions to community problems that community members themselves can support after the grant funding ends.



Start with the community

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

Encourage local ownership

Identify key community members who can help plan and bring improvements.



Provide training

A project's success depends on people.



Buy local

Purchase equipment and materials from local sources.



Find local funding

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



Measure your success

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



Sustainability – Measurements - GG

1. Establish baseline data as identified in the needs assessment.
2. Set bench marks to evaluate the progress towards your project's goals.
3. Identify measurement methods to determine the project outcome
4. Follow the guidelines established in the Global Grant Monitoring and Evaluation Plan Supplement

Budget & Financing

- All proposed expenses and supporting documentation, including bank charges, Administrative & Contingencies
- How will beneficiaries maintain these items?
- List all funding sources – with documentation

Global Grants



Global Grant World Fund Match

District Designated Funds Matched	\$1.00 : \$1.00
Rotarian Cash Contributions Matched	\$.50 : \$1.00
Non Rotarian Cash Contributions	
Matched **TRF Change	\$.50 : \$1.00
Minimum TRF Match	\$15,000**
Minimum Project Budget	\$30,000
**5% TRF Fee	

Preliminary Steps Applying for a Global Grant

1. Select project
2. Complete Community needs assessment
3. Review carefully Global Grant Terms and Conditions
4. Identify Primary Contacts – Host & International
5. Clubs form a three-person grant committee
6. Set goals of project, determine the baseline data and method of measurement

Preliminary Steps Applying for a Global Grant

7. Prepare budget & contact DRFC or DGSC to determine available DDF, **\$10,000 match per GG this year**
8. Begin on-line GG application-10 Sections
9. Reach out and secure potential \$ partners
10. Stays in DRAFT mode until all sections complete and Authorized

Case Study – GG 1757156 NMS Water & Sanitation

Project Request

Bore Hole Well to replace shallow hand dug well which is drying up and municipal water sources that are now unreliable.



Case Study Community Assessment

This global grant proposes to create an eco-friendly water, sanitation, bio-fuel, food producing gardens, live stock system working in harmony; to provide a sustainable, environmentally responsible solution, while conserving the available natural resources.


There are four primary components:

- Grey water recycling
- Borehole well drilling
- Agricultural irrigation
- BioGas Digester



Case Study – GG 1757156 NMS Water & Sanitation

Profile | Delegation | Account Settings | Sign Out (Lynda.hammond1@sbcglobal.net)

Rotary  My Rotary

Rotary.org | Club Finder

Exchange Ideas | Take Action | Learning & Reference | Manage | **The Rotary Foundation** | News & Media | Member Center

Apply for Grants


- District Grants
- Global Grants
- Grant Center


Give


- Ways to Give
- Planned Giving
- Donor Recognition


About

- Foundation Centennial
- Foundation Reports
- History

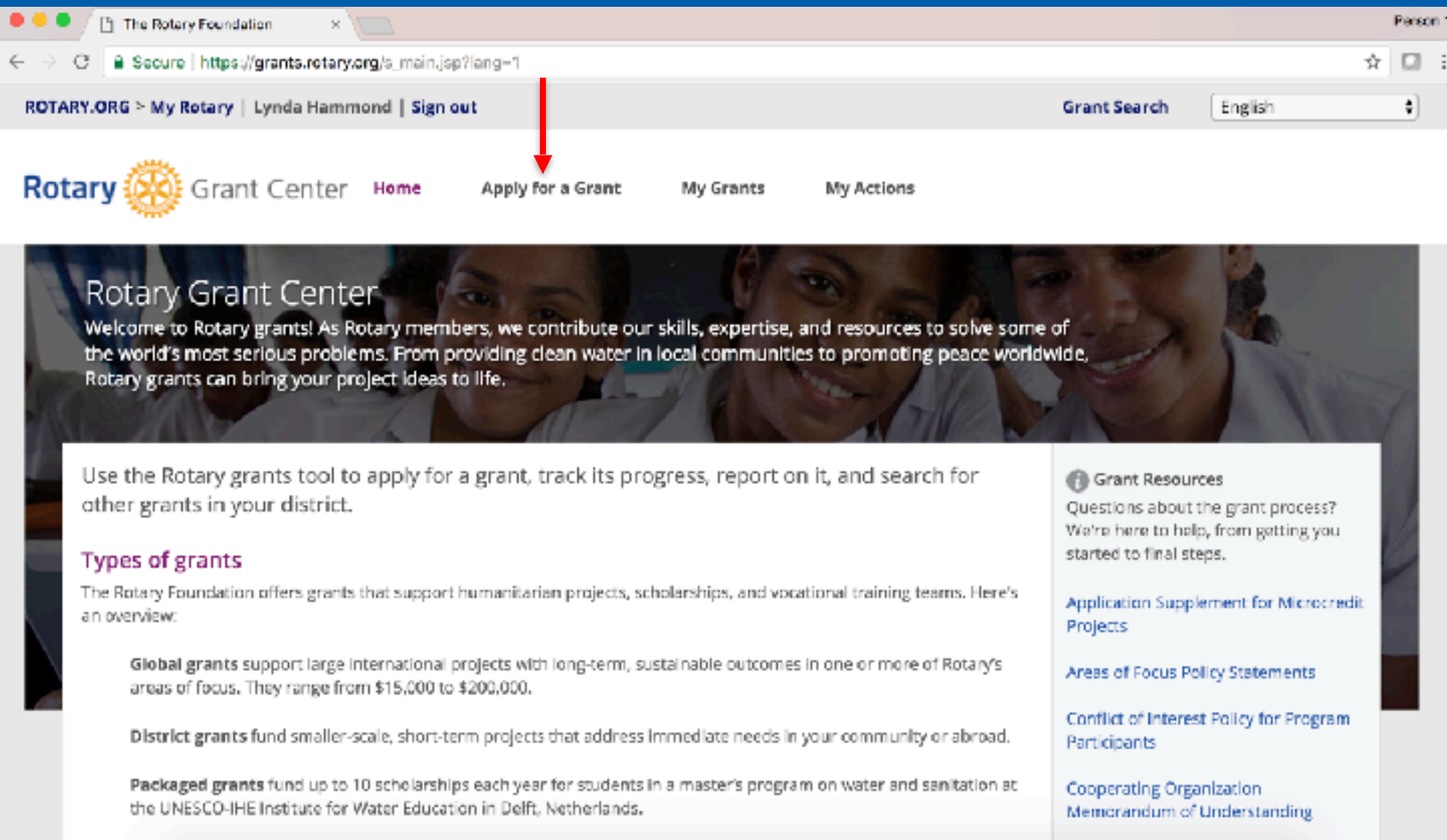





Rotary women celebrated for changing lives
<https://my.rotary.org/en/rotary-foundation>


Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves. [Read more on our strategic plan >](#)

Case Study – GG 1757156 NMS Water & Sanitation



The screenshot shows a web browser window with the URL https://grants.rotary.org/s_main.jsp?lang=1. The page header includes the Rotary.ORG logo, user information (My Rotary | Lynda Hammond | Sign out), and a Grant Search bar. The main navigation bar features links for Home, Apply for a Grant (highlighted with a red arrow), My Grants, and My Actions. Below the navigation bar is a banner for the Rotary Grant Center with a welcome message. The main content area is divided into two columns. The left column contains a section titled 'Types of grants' with an overview and three types of grants: Global grants, District grants, and Packaged grants. The right column contains a section titled 'Grant Resources' with a list of links for further information.

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 Rotary grants tool to apply for a grant, track its progress, report on it, and search for other grants in your district.

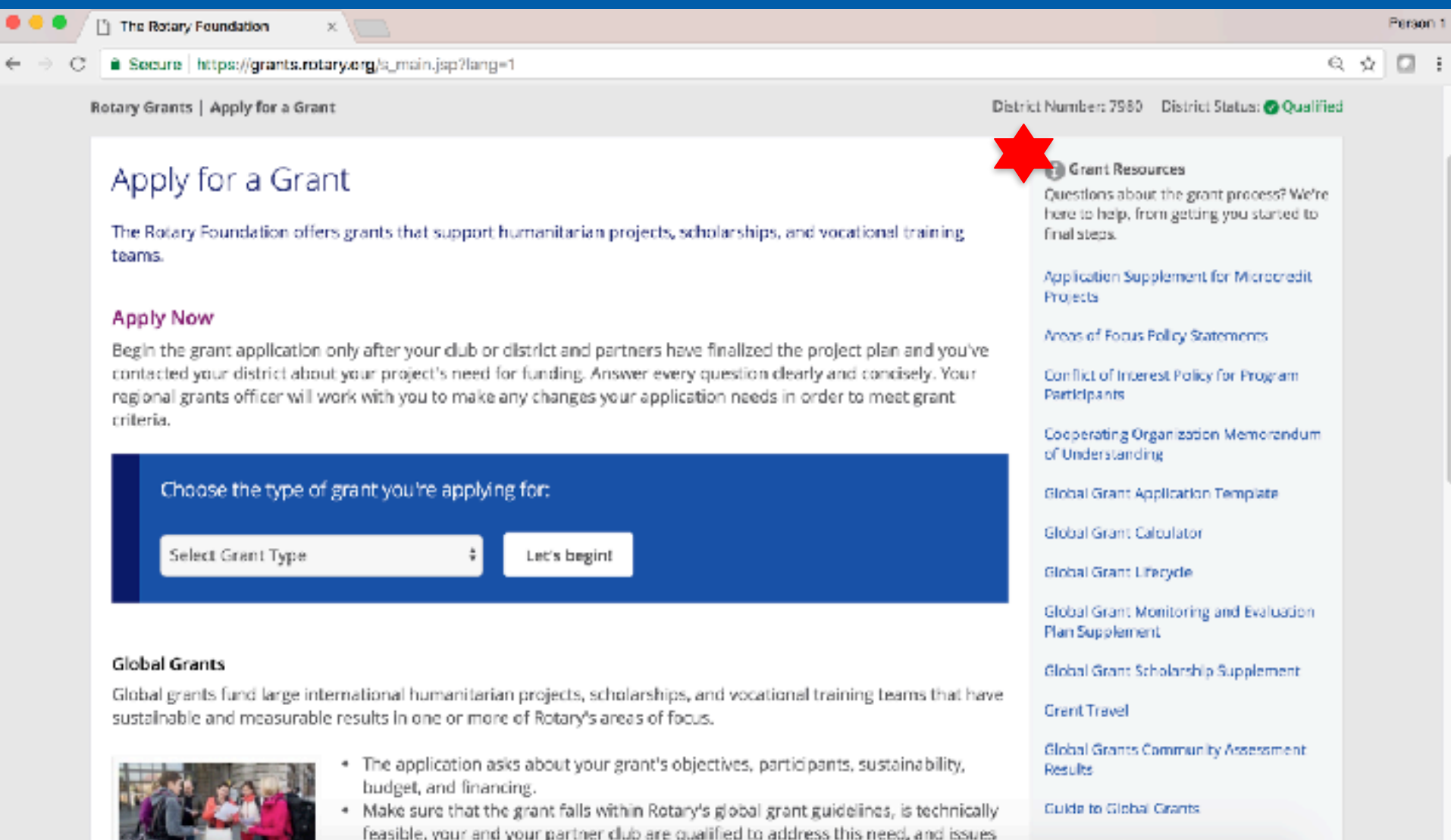
Types of grants
The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training teams. Here's an overview:

- Global grants** support large international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus. They range from \$15,000 to \$200,000.
- District grants** fund smaller-scale, short-term projects that address immediate needs in your community or abroad.
- Packaged grants** fund up to 10 scholarships each year for students in a master's program on water and sanitation at the UNESCO-IHE Institute for Water Education in Delft, Netherlands.

Grant Resources
Questions about the grant process? We're here to help, from getting you started to final steps.

- [Application Supplement for Microcredit Projects](#)
- [Areas of Focus Policy Statements](#)
- [Conflict of Interest Policy for Program Participants](#)
- [Cooperating Organization Memorandum of Understanding](#)

Case Study – GG 1757156 NMS Water & Sanitation



The screenshot shows a web browser window with the URL https://grants.rotary.org/a_main.jsp?lang=1. The page is titled "Rotary Grants | Apply for a Grant". The main heading is "Apply for a Grant". Below it, a paragraph states: "The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training teams." A section titled "Apply Now" begins with the text: "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." Below this text is a blue box with the heading "Choose the type of grant you're applying for:". Inside this box are two buttons: "Select Grant Type" and "Let's begin!". Below the blue box, the section "Global Grants" is introduced with the text: "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." To the left of the bulleted list is a small image showing a group of people. The bulleted list contains two items: "• The application asks about your grant's objectives, participants, sustainability, budget, and financing." and "• 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". On the right side of the page, there is a sidebar titled "Grant Resources" with a red star icon. The sidebar lists several resources: "Questions about the grant process? We're here to help, from getting you started to final steps.", "Application Supplement for Microcredit Projects", "Areas of Focus Policy Statements", "Conflict of Interest Policy for Program Participants", "Cooperating Organization Memorandum of Understanding", "Global Grant Application Template", "Global Grant Calculator", "Global Grant Lifecycle", "Global Grant Monitoring and Evaluation Plan Supplement", "Global Grant Scholarship Supplement", "Grant Travel", "Global Grants Community Assessment Results", and "Guide to Global Grants". At the top right of the sidebar, it says "District Numbers: 7980" and "District Status: Qualified".

Rotary Grants | Apply for a Grant


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:

Select Grant Type  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

Grant Resources

Questions about the grant process? We're here to help, from getting you started to final steps.

[Application Supplement for Microcredit Projects](#)

[Areas of Focus Policy Statements](#)

[Conflict of Interest Policy for Program Participants](#)

[Cooperating Organization Memorandum of Understanding](#)

[Global Grant Application Template](#)

[Global Grant Calculator](#)

[Global Grant Lifecycle](#)

[Global Grant Monitoring and Evaluation Plan Supplement](#)

[Global Grant Scholarship Supplement](#)

[Grant Travel](#)

[Global Grants Community Assessment Results](#)

[Guide to Global Grants](#)

Case Study – GG 1757156 NMS Water & Sanitation

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?

Nambale Magnet School Water & Sanitation Project

52/100 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

Select the primary host and international contacts for this project.

Name	Club	District	Sponsor	Role
Lynda Hammond	Orange	7980	District	International
Racheal Gatabaki	Nairobi-South	9212	Club	Host

GRANT STATUS

Submitted

LAST ACTIVITY

09/03/2018

SUBMITTED ON

09/03/2018



Print application (PDF)



Grant Resources

Questions about the grant process? We're here to help, from getting you started to final steps.

[Application Supplement for Microcredit Projects](#)

[Areas of Focus Policy Statements](#)

[Conflict of Interest Policy for Program Participants](#)

[Cooperating Organization Memorandum of Understanding](#)

[Global Grant Application Template](#)

[Global Grant Calculator](#)

[Global Grant Lifecycle](#)

Case Study – GG 1757156 NMS Water & Sanitation

Exit

Next

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 ✓

Finalize & Submit

Step 11: Review and Lock

Step 12: Authorizations

Global Grant Lifecycle

Global Grant Monitoring and Evaluation
Plan Supplement

Global Grant Scholarship Supplement

Grant Travel

Global Grants Community Assessment
Results

Guide to Global Grants

Guidelines for Rotary Foundation Funded
Project Signage

How to Use the Grant Center

Report Supplement for Microcredit
Projects

RI Exchange Rates

Rotary Grants Staff Contact Sheet

Six Steps to Sustainability

Terms and Conditions for Rotary
Foundation District Grants and Global
Grants

Training Plan for Global Grants

Vocational Training Team Itinerary

Vocational Training Team Member
Application

Global Grants - Vocational Training Teams



Global Grants - Vocational Training Teams

A Vocational Training Teams builds skills within a community through targeted educational programs or by supporting teams of professionals who travel abroad to build their own capacity or the capacity of the community they visit.

Global Grants - Vocational Training Teams

District 7980 VTT Grants In-Process

GG1415040 Sierra Leone - Early Education



GG1746010 Gift of Life–Dominican Republic
Treatment of Pediatric Congenital Heart Defects



Scholarship Alumni



Allison Rivera, President
St. Martin de Porres Academy
Rotary Alumni Scholar



Global Grants Scholarships

The purpose of the Global Grant Scholarship is to foster international understanding through graduate study in a foreign university with a concentration in one or more of Rotary International's Six Areas of Focus.

2018-19 Two GG Scholarships Available @ \$30K each

NO COST TO THE CLUB!

Nancy Riella, RC of Colchester, Chairperson

Global Grants Scholarships

- Candidates must apply through, be interviewed by, and be endorsed by a District 7980 Rotary Club prior to being interviewed by the District Scholarship Committee.
- The final decision regarding Global Grant Scholarship recipients is made by The Rotary Foundation. Sponsoring clubs will be responsible for submitting Global Grant Scholarship to TRF, and when approved be responsible for financial stewardship.

District Managed Grants



District Managed Grants

30	Humanitarian Projects @ \$2500	\$74,507
24	RYLA Scholarships @ \$125 Limited to 2 per club	\$3,000
5	World Affairs Scholarships @ \$500 limit 1 per club	\$2,500

DMG Scholarships For Our Youth



DMG Scholarships – How to apply!

1. Download District 7980 Youth Scholarship Application- www.rotary7980.org (2018-19).
2. Submit application to Lynda Hammond, via email for approval & processing
3. Reporting provide a copy of the certificate to L. Hammond for each student 10 days following the event.

District Managed Humanitarian Grants Rules 2018-19

- Max \$2500 DDF match / grant/ club
- Max \$5000 per club during a Rotary year
- Max \$7500 per project with 2 or more partnering clubs
- Max 2 DMGs per year: 1st half, 2nd half (January)



DMG Humanitarian Projects – How to apply!

1. Download DMG Instructions & Application-
www.rotary7980.org (2018-19)
2. Form a 3 Club member committee, appoint a primary project contact. Club Steward cannot participate – Lead Club only!
3. Completed application is submitted to District Managed Grants Subcommittee Chair Glenn Pearson by e-mail (glennpearson64@gmail.com) for committee review.

DMG Humanitarian Projects – How to apply!

4. Approved DMGs are forwarded to District Grants Chair, Lynda Hammond for final review, approval and funding processing. All checks require 2 signatures: Grants Chair, Foundation Chair or DG.
5. Projects cannot begin until written approval is received from Lynda. Expenses made prior to approval cannot be reimburse.

Case Study - Chester Elementary School Aquarium



Case Study - Chester Elementary School Aquarium

Project Description:

- The aquarium center provides an exciting learning opportunities and serves as a “place of calm” for children and staff, while also nurturing respect and responsibility for nature.
- Contributes to the school’s environment. It has becomes a “happy spot” for students to catch a glimpse of their favorite fish.



Case Study - Chester Elementary School Aquarium

Describe how the benefiting community will maintain this project after grant funding has been fully expended.

The CES community, including students, parents (Chester PTO), & staff has enthusiastically embraced this project and will maintain the Aquarium Learning Center after it is established by this grant.



Case Study - Chester Elementary School Aquarium

Describe specific activities of each participating club in implementing the project. What will the Rotarians who are members of the club(s) do in connection with the project?

- Targeted fund raising and public awareness effort associated with our weekly Rotary Booth at the Chester Sunday Market, staffed by Rotarians and the School Principal.
- Participating in painting the ocean wall mural behind the aquarium, together with CES students and teachers.
- Assist with the physical assembly and set up of the Aquarium Center with the staff.



Case Study - Chester Elementary School Aquarium

Project Planning

- Equipment will be purchased by CES.
- CES will own and maintain the equipment
- No training is required. The CES staff have the skills & support of the Shoreline Pet & Aquarium staff.



Case Study – CES Aquarium Project - Budget

Aquarium Equipment & Supplies	\$3080.18
Wood Bench (2)	\$1192.20
Rotary Logo sign	\$310.90
CES Logo sign	\$310.90
Mural Paint & Art Supplies	\$100.00
Total Budget	\$4994.18



Case Study – CES Aquarium Project - Funding

	Club Funds	D-7980 Match	Total Funding
Chester RC Lead	\$2497.09	\$2497.09	\$4994.18

Beneficiaries	Rotarians Involved	Project Start Date	Project End Date	Final Report Due
207*	21	Sept. 2017	12/1/17	3/1/18

*Each year



Case Study - Chester Elementary School Aquarium

Rotary Club of Chester
Project Leader: Ted Taigen
Thank YOU!



DMG Humanitarian Project – Coogan Giving Garden



DMG – Coogan Giving Garden - Budget

Used Tractor

35 HP, 4 wheel drive, agricultural tires,
equipped with front-end loader, pallet forks, rit plow &
bed shaper/irrigation implement

Total Cost: \$15,955



DMG – Coogan Giving Garden – Funding

	Club Funds	D-7980 Match	Total Funding
Mystic -Lead	\$2,500		
Stoningtons	\$2,500		
Waterford	\$500		
Montville	\$500		
Groton	\$955		
New London	\$1,500		
	\$8,455	\$7,500	\$15,955



DMG – Coogan Giving Garden – Awarded 2/27/15



DMG– Coogan Giving Garden – Produce Production



Season	Production lbs
2014	2,088
2015	3,500
2016	12,000
2017	14,000



DMG Humanitarian Project – Coogan Giving Garden



DMG Humanitarian Project – Coogan Giving Garden

Rotary Club of Mystic
Project Leader Carol Kent

Thank YOU!



District Managed Grants – Examples

- Operation Warm – Winter Coats for kids
- School Supplies, Laptops, Mini Libraries
- Senior Food Pantry
- Surgical Equipment, Medical Supplies, Defibrillators
- Literacy - English as a Second Language
- Bio-Sand Water Filters
- Community Gardens

Stewardship – Begins with US!

10th Consecutive year The Rotary Foundation gets a perfect score!

 CHARITY NAVIGATOR Your Guide To Intelligent Giving	Score (out of 100)	Rating
Overall Score & Rating	100.00	★★★★
Financial	100.00	★★★★
Accountability & Transparency	100.00	★★★★

Stewardship – Qualification Requirements

To be eligible to receive Rotary Foundation funds, a club must:

- Submit TRF Fundraising Goals on My Rotary
- Submit signed TRF & District MOU
President 2018-19 & President-Elect 2019- 20
- Current reporting on all TRF grants
- Attend grant management seminar annually – 1 person min.
- Designated a Club Steward in DACDB
Proper TRF Financial Management
- Re-qualification by webinar or on-line if attended in prior 3 years
- District Steward maintains these record

Stewardship - Club Qualifications

	Global Grants	DMG Lead Club	DMG Partner Club	DMG RYLA & WAS
MOU – TRF & District	😊	😊	😊	😊
TRF Goals - DACdb	😊	😊	😊	
Club Steward –DACdb	😊	😊		
Grant Reporting Current	😊	😊		

Grant Stewardship

Stewardship is the responsible management and oversight of grant funds, including:

- Rotarian supervision
- Standard business practice
- Financial record review
- Oversight of funds
- Reporting irregularities to the District & TRF
- Timely submission of reports



Stewardship Financial Management Plan

- Bank account for funds
- Distributing funds
- Use checks/bank cards to track funds
- Detailed ledger
- Comply with local laws



Stewardship DMG Reporting

- All projects must be completed by September 15th, 2019.
- After completion of the project, the final report must be filed within 60 days or by September 30, 2019 whichever is sooner.
- Copy of checks received from partnering clubs.

Stewardship DMG Reporting

- Report must include documentation of each expenditure with copies of all receipts and canceled checks.
- Club must cooperate with any District or Rotary Foundation audit.
- Retain a copy of the for a minimum of five years.



Stewardship Global Grant Reporting

- How partners & Rotarians were involved
- Type of activity
- Evaluation of project goals
- How area of focus goals were met
- How funds were spent
- Number of beneficiaries and how they benefited
- Sustainability Measurements



Stewardship Global Grant Reporting

- Progress report
 - Within 12 months of first payment
 - Every 12 months through the life of the grant
- Final report within 2 months of completion



Grant Management Tip

- Project planning begins with a needs assessment.
- Identify Conflict of Interest or perceived conflict of interest.
- Identify and list cooperating organizations
- Communicate with all partners regarding the planning, implementation, financial management before you start drafting the grant.

Grant Management Tip

- Communication between the Host & International partners is essential. Discuss any potential problems or changes as the project progress.. Make decisions jointly.
- Changes can occur during the project implementation - secure authorization before proceeding with a change in the scope. Document and include the authorization in your report(s).

Grant Management Tip

- Both parties should have copies of all financial invoices, bank statements and project documentation.
- Gather, review, approved & organize all documentation as it becomes available — don't wait until it's time to file a report!
- All reports must be complete & submitted on a timely basis!

Resources

- Rotary International and District websites
- Grant Management Manual (1000-EN-313)****
- Terms and Conditions of Rotary foundation District Grants and Global Grants (updated June 2013)
- District Leadership
- Rotarians involved in prior Global Grants
- Rotary Grants: On-line learning, “Building a Global Grant” www.learn.rotary.org

Grant Management

Coming
Soon!



Stewardship – Begins with US!

10th Consecutive year The Rotary Foundation gets a perfect score!

 CHARITY NAVIGATOR Your Guide To Intelligent Giving	Score (out of 100)	Rating
Overall Score & Rating	100.00	★★★★
Financial	100.00	★★★★
Accountability & Transparency	100.00	★★★★

District 7980 Rotarians

Together **WE**
change and **save**
lives everyday!

