Grants Management Certification

2020-21

PDG SHAB ELAWAR
MICHAEL DRIEBE

Agenda

* Sustainable Impact

* Partnership

* Planning

* Applying

* Implement, Monitor and Evaluate

* Reporting

* Support

Global Grant Requirements

* Your project must:
    * Have a long-term, sustainable impact
    * Clearly fit into one of Rotary's areas of focus
    * Invest at least $30,000
    * Address a need identified by the community
    * Strengthen the community's capacity to meet its own needs

The Rotary Foundation

Global Grant Requirements

* You must:
    * Apply through Rotary.org
    * Actively involve the benefitting community
    * Partner with a club in another country
    * Develop a project plan that includes a budget and a financial management plan
    * Measure progress toward the outcome
    * Stay up-to-date in reporting for all active grants

The Rotary Foundation

Eligible Activities

* **Humanitarian Projects**
  * Sustainable, measurable outcomes that address real community needs
* **Vocational Training**
  * Build skills trough targeted educational programs
  * Vocational Training Teams
* **Scholarships**
  * Fund International graduate-level study within a Rotary focus-area

The Rotary Foundation

Club Qualification

* Attend a Grant Management Seminar
* Complete the Club Memorandum of Understanding (MOU)
* Club Donation to TRF by June 15, 2021, including Annual Fund, Polio Plus, approved Foundation Grants, Endowment (Permanent) Fund
* Submit Club Goals through Rotary Central for 2020-2021 by July 15, 2020

Sustainability

* Start with the community
    * Identify a need and a solution that builds community strengths and aligns with local values
* Encourage local ownership
    * Identify key community members who can pioneer lasting improvements
* Provide Training
    * Strengthens ability to meet objectives

The Rotary Foundation

Sustainability

* Buy Local
  * Builds capacity and ensures spare parts remain available
* Find local funding
  * Funding from local government, hospitals, companies
* Measure success
 * Start with base line data, measurable outcomes and sound collection practices

Making an Impact: The seven Areas of Focus

* Promoting Peace
* Fighting Disease
* Providing Clean Water

* Saving Mothers and Children
* Supporting Education
* Growing Local Economies
* Environment

The **Rotary** Foundation

Making an Impact

* Consider setting a high-level goal

* Think about the impact, not the activity

* Read Rotary's Areas of Focus Guide/Policy Statements

 - Rotary's Goals

 - Eligible Activities

 - Elements for Successful Grants
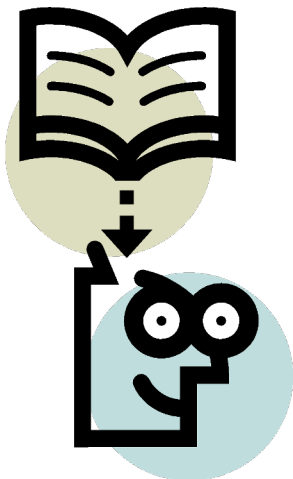
Community Assessment

* Rotary asks the local club(s) to do an assessment
  * Project is driven by data from the start
  * Lends credibility
  * Determines sustainability
  * Should involve different groups
  * Determines feasibility, the clubs' qualification, and determines if another organization is already meeting the need

The Rotary Foundation

Partnership Requirements

* Host Sponsor
  * Initiates the Project
  * Community Assessment
  * Manages Implementation & Budget
  * Receives Project Funds
  * Reports

* International Sponsor
  * Financial Assistance
  * Technical Support
  * Performs tasks that can be done remotely
  * Participates in service during site visits
  * Sign reports

The Rotary Foundation

Partnership Requirements

* Both Sponsors
    * Must be qualified
    * Develop the project plan
    * Have project committees that collaborate/communicate
    * Partner with cooperating organization, if needed

The Rotary Foundation

Develop a Project Plan

* The plan should document
  * Impact
  * Measurable goals and outcomes
  * Actions needed for each step
  * Assignment of responsibilities
  * Monitoring and data collection
  * Possible alternatives if things aren't going to plan

The Rotary Foundation

Develop a Project Plan

* Create a Timeline that includes
  * Community Assessment
  * Committee Meetings
  * Training
  * Meetings with Community and Cooperating Organizations
  * Project Implementation Milestones
 * Monitoring
  * Evaluation – middle and end

The Rotary Foundation

Other Tips

* Work as a Team
  * Sponsors each need a committee of at least three
* Plan for Continuity
  * Who's in for the long haul?
* Who will do what?
  * Down to last detail
* Avoid Conflicts of Interest
  * No one with a financial interest

The **Rotary** Foundation

Other Tips

* Get Expert Advice

  * Qualified club members

  * Cooperating Organizations

  * Rotarian Action Group (RAG)

  * Cadre of Technical Advisors
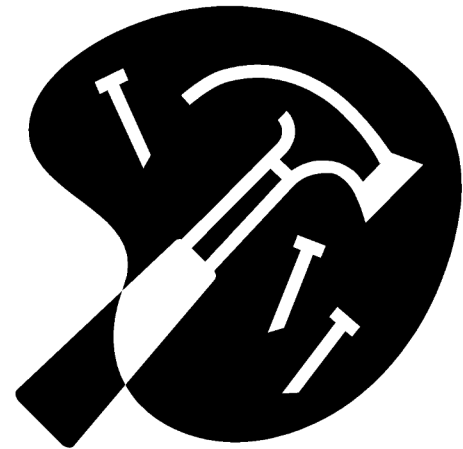
Measurable Outcomes

* Be specific about who will benefit and what benefits they will receive

* Establish baseline data and set benchmarks

* Specify your measurement methods

* Create a timeline

* Budget 5% to 10% of your project funds to cover evaluation

Financial Management Plan

* Promotes Oversight and Transparency; and Reduces Errors and Misuse
  * Proper distribution
  * Thorough financial records
  * Manage a club or district controlled bank account
                    Note: Host and International Partner

The Rotary Foundation

Budget

* Take into account
    * Project goals
    * Fundraising resources
    * How much DDF is available?
* Must be detailed, line item
* Three competitive bids … best price & best quality
    * Identify involved Rotarians – can't be on a committee
    * Document the reason for your vendor selection

The Rotary Foundation

Raise Funds

Global Grants are a combination of

* Club Funds
* District Funds and
* TRF's World Fund of at least $15,000
* Direct fund(no 30% needed)
* Endowment (no 30% needed)
* COVID 19 (no 30% needed)
* As of July 1st just changed to 15%not 30%


The **Rotary** Foundation

Raise Funds

* District Designated Funds are matched 100% by the World Fund

* Rotary Member Cash Contributions (or funds raised by Rotary members) are matched at 0% by the World Fund starting July 1-2020

* Nonmember Cash Contributions to the project account or to TRF are eligible to be matched at 50% normally ,but 0 on July 1; not from cooperating organizations or beneficiaries

  * Note cash contributions to TRF require an additional 5%,unless you send it to the host

  * Starting July 1st 2020 no match for cash

Funding Example

* Host contributes $4,000
* International Sponsor contributes $6,000
* Districts use DDF of $15,000
* The World Fund matches the clubs at $0 and the DDF at $15,000, for a total of $15,000
* Total raised: $40,000

The Rotary Foundation

Points to Remember

* TRF never asks for funding from the benefitting community – we don't ask for money in exchange for grants
* However, a community account can be encouraged to address post-grant related costs (e.g. repairs)
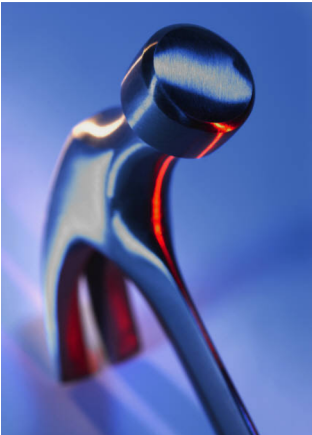
Getting Started

* Call or email DG or DRFC (Greg or Susan) to discuss available DDF
* Use the online Grant Application Tool on My Rotary
* Applications are accepted year-round
* Give yourself plenty of time to complete, especially grants involving international travel

The Application

* When you start there'll be a knowledge check to see if the project meets global grant requirements
* Then you'll be asked to describe
    * Objectives
    * Activities
    * Plan and schedule
    * Community Needs
    * Area(s) of Focus
    * Partners
   * Budget and Financing

The Rotary Foundation

Then What?
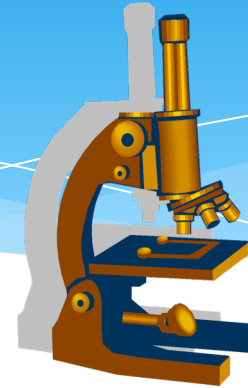
* Once the application is complete
    * Regional Grants Officer reviews
    * If World Fund match is $50,000 or more, it is reviewed by the Cadre of Technical Advisors
    * DDF authorization by the DG and DRFC
    * Application is authorized by
        * Primary Club Contacts
        * Club Presidents
        * DRFC and DG

Why Grants Get Denied

* Doesn't fit an area of focus
* Isn't sustainable
* Benefits another organization's programs
* A club partner has reached 10 open grants
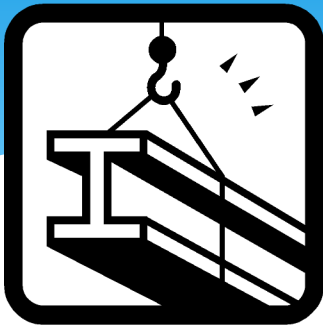* A club partner isn't current on reporting on other grants

Points to Remember
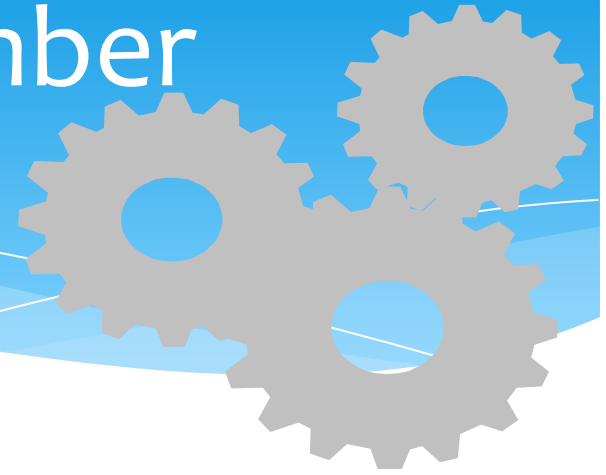
* Begin the application only after your club and partners have finalized the project plan (and you've contacted the DG or DRFC about funding)

* Be clear and concise in your answers

* Your regional grants officer is there to help you succeed

The Rotary Foundation

Implementation

* Communicate regularly with community and partners
* Review
* Revise and get changes approved
* Measure
* Check in
* Update your members and partners about progress, challenges and solutions throughout

Monitoring and Evaluation

* A continual process of collecting specific data
* Uses your measures and benchmarks
* Assesses how well you are meeting the stated objectives
* Helps you understand how to improve over the short and long term
* It's done from start to finish

Financial Transparency

* Follow the financial management plan
  * Keeps track of funds
  * Promotes transparency
  * Safeguards against misuse
  * Facilitates reporting
  * Is a guide for record keeping

The Rotary Foundation

Other Tips to Remember

* The Bank Account
  * Club-controlled and only for receiving and disbursing funds
  * Not for investment
  * Account name should identify the club and require two signatures for checks
* Follow Local Laws
* Sign a Global Grant Legal Agreement
* Unused money gets returned to Rotary
* Keep financial records and other documents

The Rotary Foundation

Rotary is Watching

* The project may
    * Undergo a Technical Review during the application period
    * Have a Site Visit
        * Before, during or after
    * Audit
        * Can be on-site
        * Done randomly

The Rotary Foundation

Reporting Requirements

* The host sponsors are responsible for reporting providing International partners did not receive any funds

* First report is due within 12 months of receiving the first grant payment and every 12 months thereafter

* Last report is due within two months of completion

The Rotary Foundation

Why bother?

* Reporting shows good stewardship
* It demonstrates to the world what Rotary is accomplishing

You are Not on Your Own

* District Foundation Committee
* Regional Rotary Foundation Coordinator
* Regional Grants Officer
* Area of Focus Managers
* Cadre of Technical Advisors
* Rotary Support Center
* Rotary Grants Discussion Group
* Rotary Ideas
* RI Convention

The Rotary Foundation
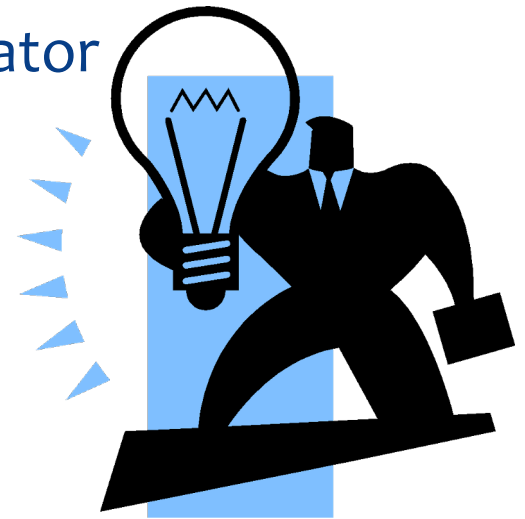
Questions?

Susan Jhonson

District Rotary Foundation Chair

(702)454-3951

Loshj-ej@msn.com

Shab Elawar

Global Grant Chair

951-295-7358

Shabdg201415@gmail.com

Rotary Opens Opportunities

The Rotary Foundation