

# Grants Management Certification 2020-21

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# 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



# 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



# Eligible Activities

- \* **Humanitarian Projects**

- \* Sustainable, measurable outcomes that address real community needs

- \* **Vocational Training**

- \* Build skills through targeted educational programs
- \* Vocational Training Teams

- \* **Scholarships**

- \* Fund International graduate-level study within a Rotary focus-area

# 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

# 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



# 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



# 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



# 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

# Partnership Requirements

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



# 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

# 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



# Other Tips

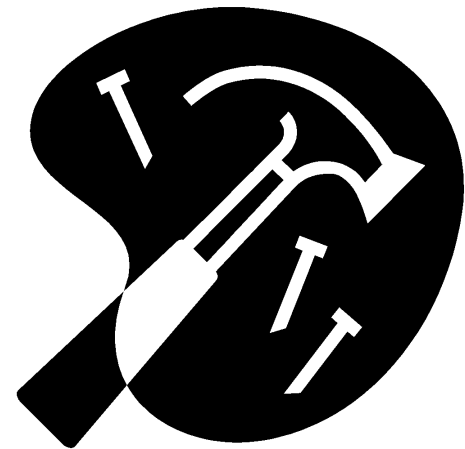
- \* Work as a Team
  - \* Sponsors each need a committee of at least three
- \* Plan for Continuity
  - \* Who's in for the long haul?
- \* Who will do what?
  - \* Down to last detail
- \* Avoid Conflicts of Interest
  - \* No one with a financial interest





# 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



# 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



# Raise Funds

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



# Latest GG Changes

## NEW RULES FOR Global Grants July 2020

Elimination of WF minimum for GG:

Global Grants (GG) are now defined as having a minimum budget of US\$30,000 and maximum World Fund (WF) award of US\$4,00,000.

This means that applicant can use a combination of District Designated Fund (DDF), cash, and/or Directed gifts & Endowment earnings to fund a global grant.

The Rotary Foundation will provide a 100% WF match only for DDF contribution

# 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

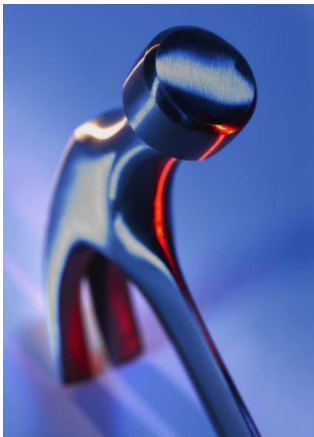
# Funding Example

- \* 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



# 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

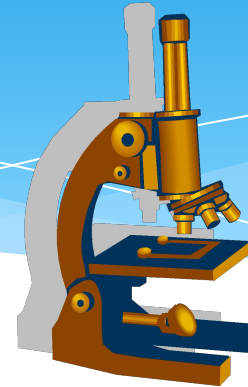


# The Application

- \* 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



# Then What?



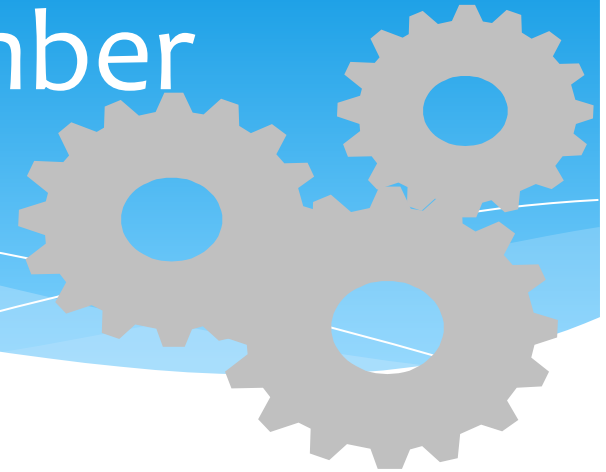
- \* Once the application is complete
  - \* Regional Grants Officer reviews
  - \* If World Fund match is \$50,000 or more, it is reviewed by the Cadre of Technical Advisors
  - \* DDF authorization by the DG and DRFC
  - \* Application is authorized by
    - \* Primary Club Contacts
    - \* Club Presidents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

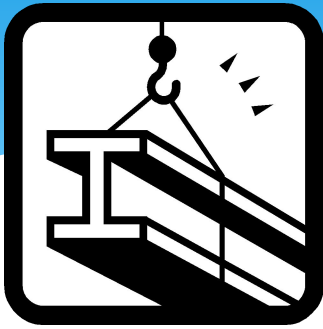


# Points to Remember



- \* 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

# 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



# 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

# 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

# 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



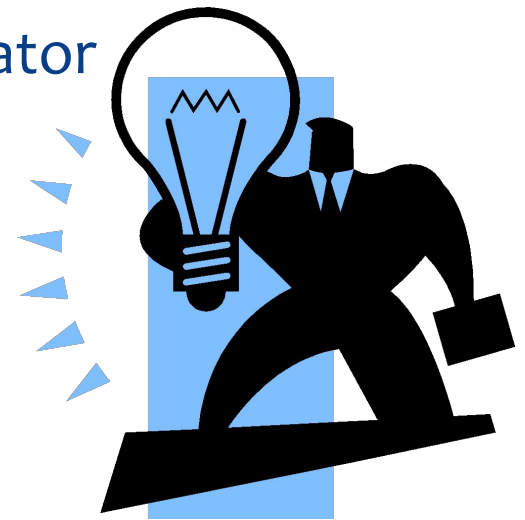
# Why bother?



- \* 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



# Questions?

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