

Rotary



BE THE
INSPIRATION

The
Rotary
Foundation



EFFECTIVE MANAGEMENT OF GLOBAL GRANTS & DISTRICT GRANTS

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ARRFC 2018-2019

Rotary



INTRODUCTION

WHY TO APPLY FOR GRANTS?

It takes lots of time and lots of effort!

Most of our grants are denied by TRF!

Why don't we use our funds to do projects in our community?

Are there any tricks for quick approval?



MEET OUR FOUNDATION



The Rotary Foundation

Not-for-profit corporation supported solely by voluntary contributions from Rotarians and friends of the Foundation who share its vision of a better world.



THE ROTARY FOUNDATION MISSION



To enable Rotarians to advance world understanding, goodwill and peace through the improvement of health, the support of education, and the alleviation of poverty.



HOW DOES TRF USE DONATIONS?



Our Causes

Rotary is dedicated to six areas of focus to build international relationships, improve lives, and create a better world to support our peace efforts and end polio forever.

EXPLORE OUR CAUSES



Peace and Conflict Prevention/Resolution



Disease Prevention and Treatment



Water and Sanitation



Maternal and Child Health



Basic Education and Literacy



Economic and Community Development

Rotary



DO IT YOURSELF !

**TO LEARN, YOU HAVE TO LISTEN
TO IMPROVE, YOU HAVE TO TRY**

F.A.I.L

FIRST ATTEMPT IN LEARNING

DID YOUR CLUB SUBMIT A GLOBAL GRANT?

If not why ?

No time?

No project?

No Partner?

Do not know?

The Grant Center is the online place to go for everything you need for your Rotary Foundation grants, and it keeps all of Rotary's grant-related resources handy for you.



APPLY TO GLOBAL GRANTS

Applying for a Global Grant needs:

Knowledgeable, Energetic and Persistent Rotarians.

Rotarians ready to volunteer their time, efforts and resources.

Rotarians who are able to write in details and answer questions.



ROTARY FOUNDATION GRANTS

GLOBAL GRANTS:

Support large international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus.

DISTRICT GRANTS:

Fund smaller-scale, short term projects that address immediate needs in your community or abroad.



GLOBAL GRANTS

International Humanitarian projects provide sustainable, measurable outcomes that address real community needs.

Vocational Trainings Teams build 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.

Scholarships fund international graduate-level study by people seeking a career within an area of focus.



GLOBAL GRANTS

Support **large international projects** with long-term, **Sustainable and Measurable** outcomes.

Include activities that **clearly** fit into one of Rotary's **AOF**.

Address an **important need** identified by the community itself.

Have International **Partnership** between the district or club where the activity is carried out and a district or club in other country.



DISTRICT QUALIFICATION

DG, DGE and DRFC complete qualification process online annually agreeing to implement the Financial and Stewardship requirements included in the MOU.



THE ROTARY FOUNDATION

DISTRICT QUALIFICATION MEMORANDUM OF UNDERSTANDING

1. District Qualification
2. District Officer Responsibilities
3. Club Qualification
4. Financial Management Plan
5. Annual Financial Assessment
6. Bank Account Requirements
7. Report on Use of Grant Funds
8. Document Retention
9. Method for Reporting and Resolving Misuse of Grant Funds

1. District Qualification

To participate in district, global, and packaged grants, a district shall complete an online qualification process, agreeing to implement the financial and stewardship requirements in this memorandum of understanding (MOU). By successfully completing these requirements, a district becomes qualified, and eligible to participate in Rotary Foundation (TRF) grants.

- A. A district is responsible for the use of funds for district-sponsored grants, regardless of who controls the funds.
- B. A district is responsible for a club-sponsored grant if the sponsoring club has been terminated or is otherwise unable to take responsibility for the grant.
- C. To maintain qualified status, a district must comply with this MOU and all applicable TRF policies.
- D. Qualification may be suspended or revoked for any of the following:
 1. Misuse or mismanagement of grant funds, or failure to appropriately address allegations involving, but not limited to, fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes
 2. Refusal to qualify member clubs without sufficient cause
- E. A district must cooperate with any financial, grant, or operational audits.

2. District Officer Responsibilities

The district governor, district governor-elect, and district Rotary Foundation committee chair shall hold primary responsibility for club and district qualification, in addition to overseeing the proper implementation of TRF grants.

District officer responsibilities include:

1. Implementing, managing, and maintaining the district and club qualification process
2. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices
3. Abiding by, following, enforcing, disseminating, and educating Rotarians on the terms and conditions for district, global, and packaged grants

CLUB QUALIFICATION

The Club Appoints TRF Chair.

The Club agrees to and signs the Club **MOU as provided by TRF** and the **Addendum to the Club MOU** as provided by D2452;
Signature should be made by the Club President as registered in “MyRotary” and the Incoming President and MOU must be renewed each year.

The Club Sends at least one Club member to GMS (President, President-Elect, Club Foundation Chair or others).



MAKE A SUSTAINABLE IMPACT

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



MAKE A SUSTAINABLE IMPACT

Start with the community

Host sponsors should work with members of the benefiting community to identify a need and develop a solution that builds on community strengths and aligns with local values and culture.

MAKE A SUSTAINABLE IMPACT

Encourage local ownership

It's a true sign of a project's success when community members embrace the project as their own. Identify key community members who can help pioneer lasting improvements.

MAKE A SUSTAINABLE IMPACT

Provide training

By providing training, education, and community outreach, you strengthen beneficiaries' ability to meet project objectives. Confirm that a plan is in place to transfer knowledge to new beneficiaries. Collaborate with local organizations to provide this training.

MAKE A SUSTAINABLE IMPACT

Buy local

Purchase equipment and technology from local sources whenever possible. Make sure that spare parts are available locally. Build capacity so that community members can operate, maintain, and repair equipment on their own.

MAKE A SUSTAINABLE IMPACT

Find local funding

Getting funding from local governments, hospitals, companies, and other organizations integrate your project into the local community and supports your project's long-term success.

MAKE A SUSTAINABLE IMPACT

Measure your success

Gather data before you begin the project to determine where you start from. Include clear and measurable outcomes in your project plan, and decide how you will collect data throughout your project and afterward.

PLANNING A GLOBAL GRANT

Before applying for a Rotary Foundation Global Grant, clubs should create a project based on **Community needs**, and designed to ensure **achievable, measurable, and sustainable results**.

SMART

Specific, Measurable, Achievable, Realistic, Timely.



PLANNING A GLOBAL GRANT

Community Assessment (605EN)

Develop a Project Plan

Create a timeline

Work as a team and Decide who will do what (COMMUNICATOIN PLAN)

Plan for continuity (MANY YEARS)

Avoid conflict of interest

Get Experts advices

Create a Financial Plan

Develop a Budget

Raise Funds

Project should be supported by a strong Partnership



PARTNERSHIP TO MAXIMIZE YOUR IMPACT

To apply for a Global Grant, two or more Rotary Clubs must work together:

The **Host Sponsor** is the partner in or near the community that's implementing the project.

The **International Sponsor** works with the Host Sponsor, but it's located outside of the host sponsor's country.



PARTNERSHIP TO MAXIMIZE YOUR IMPACT

Host Sponsor

Initiates the project.

Conducts a community assessment.

Manages project implementation and budget.

Provides local assistance and supports VTTs and Scholars.

Receives project funds.

Assigns Project Committee (1 Primary contact and 2 members).



PARTNERSHIP TO MAXIMIZE YOUR IMPACT

International Sponsor

Rotarian Action Group (AOF), Rotary Showcase, Personal travel, Districts & Regional Seminars, Zone Institute and RI Conventions.

Provides financial assistance and technical support.

Performs project tasks that can be done remotely, as well as participating in service during site visits.

Prepares VTTs or scholars for travel and study abroad.

Assigns Project Committees (1 Primary contact and 2 members).



PARTNERSHIP TO MAXIMIZE YOUR IMPACT

Cooperating Organizations

Collaborating with another organization can enhance the quality and effectiveness of your project.

A cooperating organization can provide technical expertise, advocacy, training, education, or other support.

If you work with a cooperating organization, both clubs and the organization must complete a cooperating organization MOU.



GLOBAL GRANTS FINANCING

Host/International Club or District , 3rd party, DDF, and World Fund.

Global Grants have a **minimum budget of \$30,000.**

TRF Awards range from **\$15,000 to \$200,000.**

TRF matches **cash at 50%** and **DDF at 100%.**

Rotarian and non-Rotarian cash contributions **matched 50%**
with World Fund.



GLOBAL GRANTS FINANCING

May allocate up to 10 % of the project budget for project management costs (project manager, overhead and administrative costs of cooperating organizations).

May allocate up to 10 % of the project budget for contingencies to offer protection from price increases and/or currency fluctuations

5 % Administration fees on Cash sent to TRF

International sponsors provide at least 30% of total sponsor funding.



GRANT INELIGIBILITY

Grant applications are most often denied because:

The project doesn't fit any of Rotary's Areas Of Focus.

The project isn't Sustainable.

TRF Award less than 15,000 USD

International Partners less than 30% of total contributions

A Club has reached 10 open Grants, the maximum number.

A Club is not current on its reporting on other grants.



GET STARTED! USING THE GRANT APPLICATION TOOL

The Rotary Foundation accepts applications throughout the year.

Type of the project

Committee members

Project's Overview & Objectives

Areas of focus

Measuring success

Sustainability

Location and Dates

Participants

Project budget and Funding (5%)



REVIEWS AND AUTHORIZATIONS

	View application	Edit application	Authorize application
Primary project contact	●	●	●
Club president	●	●	●*
Club treasurer	●		
District Rotary Foundation chair	●	●	●
District governor	●	●	●**
District stewardship subcommittee chair	●	●	
District grants subcommittee	●	●	
District scholarship subcommittee chair	●	●	

*Signs legal agreement after application is approved by Rotary

**Only if District Designated Funds are used for the grant



WHAT HAPPENS NEXT?

Once your fully completed application has been submitted, it will be reviewed by your grants officer and other staff as necessary.

Applications requesting between \$50,001 and \$100,000 from the world fund will receive a technical review and interim site visit by TRF Cadre of Technical Advisers.

Applications requesting between \$100,001 and \$200,000 must be approved by the Trustees at one of their meetings.



GLOBAL GRANTS FUNDS

Grant funds will not be released until:

Bank Account has been opened with 2 signatories who are members of the sponsoring club or district.

Legal Agreement has been authorized by both Presidents.

OFAC (*Office of Foreign Assets Control*) has been filled and sent to TRF.

Contributions have been submitted to TRF.

Grant funds will be paid after 2 weeks to the Bank account provided in the application.



GLOBAL GRANTS FUNDS

If grant applications are not formally submitted within 12 months of initiation, the application will be canceled.

If grant applications are not completed and approved within six months of submission, the application will be canceled.

If payment requirements are not met within six months of approval, the grant will be canceled.

If grants are not implemented within 12 months of payment, the grant will be canceled and the sponsors will be required to return the funds.



PROJECT IMPLEMENTATION

It's crucial that you implement your project according to your **Project Plan**, because all of your partners and The Rotary Foundation have agreed upon it and are working within that plan.

If challenges arise, communicate with all involved parties to address them promptly and collaboratively.

PROJECT REPORTING

Grant recipients should report on the use of grants to TRF.

New grant applications will not be accepted by the Foundation if a grant sponsor has an overdue report for any Foundation Grant.

Progress reports must be submitted online within 12 months of receiving the first grant payment and every 12 months thereafter.

Final reports must be submitted online within 2 months of completing the project.



PROJECT DOCUMENTATION

The club must establish and maintain copies of all receipts and bank statements related to grant-funded expenditures with a min of 5 years (paper and electronic).

TRF reserves the right to review Grants at any time, conduct an audit or send a monitor and require additional document.



GLOBAL GRANT LIFECYCLE

Application Phase

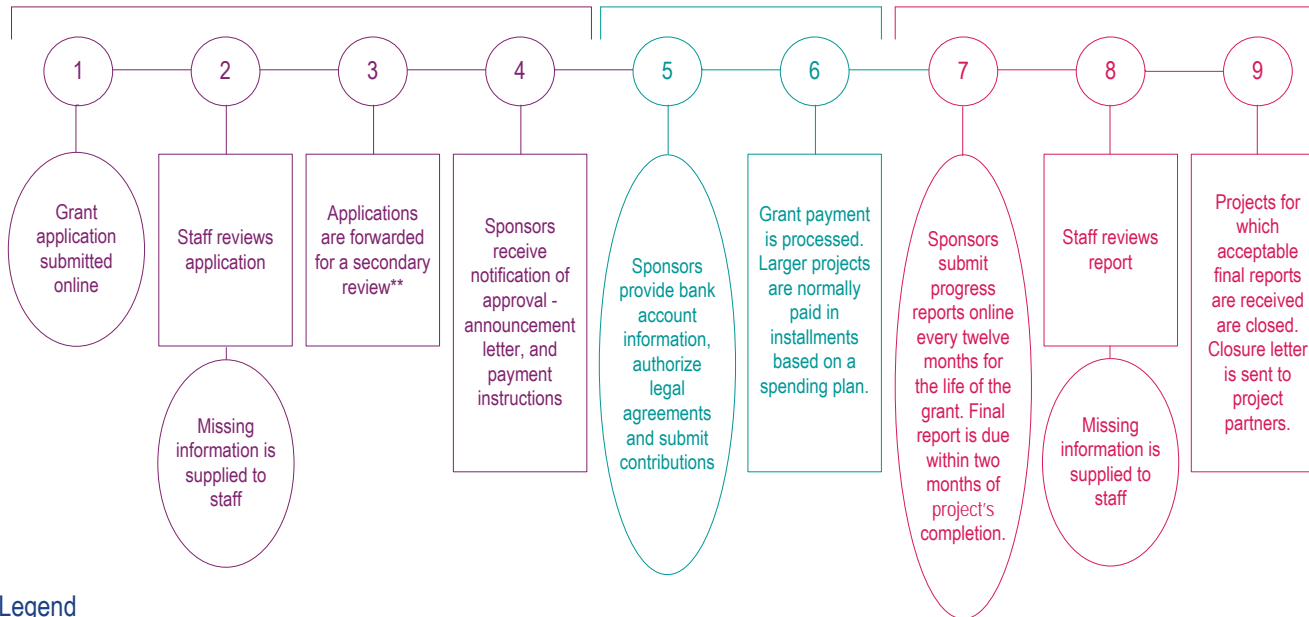
If application arrives at TRF complete, time from receipt to approval of application is approximately 4 weeks.*

Payment Phase

From time that TRF receives bank account information, signed legal agreements, and contributions, processing of payment takes approximately 2-4 weeks.*

Reporting Phase

Staff review reports in the order in which they are received within 4 weeks of receipt at TRF.*



Legend

○ = Rotarian action

□ = TRF action

* Timeframe may be longer during peak times.

** Applications requesting a match of more than \$50,000 are reviewed by the Cadre. Applications requesting a match of more than \$100,000 are reviewed by the Trustees.



DISTRICT GRANTS

District Grants are block Grants awarded annually to Districts:

Local or International Humanitarian Projects.

Vocational Trainings Teams, which are groups of professionals who travel abroad either to teach local professionals about their fields or to learn more about it themselves.

Scholarships, for any level, duration, location, or area of study.

Youth programs, including Rotary youth exchange, RYLA, Rotaract and Interact.

Members' **travel and participation in Rotary Project fairs.**



DISTRICT GRANTS FINANCING

Fund smaller-scale, short term projects aligned with the Foundation's mission, that address immediate needs in your community or abroad.

Clubs have quicker access to DDF, easier foundation application and reporting process.

Districts may apply up to 50 percent of their District Designated Funds to a District Grant each year. (which represents 50 percent of its annual giving from three years' prior plus any Permanent Fund-SHARE earnings)



DISTRICT GRANTS FINANCING

May allocate up to 3 % of the Grant award for administrative expenses such as bank fees, postage, software...

May allocate up to 20 % of the Grant for contingencies.

May fund projects and activities in Rotary and non-Rotary countries and geographic areas.

May fund Scholar and VTTs orientation and GMS.

Extra funds available for District Grants (20% Split evenly between 19-20 and 20-21)



APPLYING FOR DISTRICT GRANTS

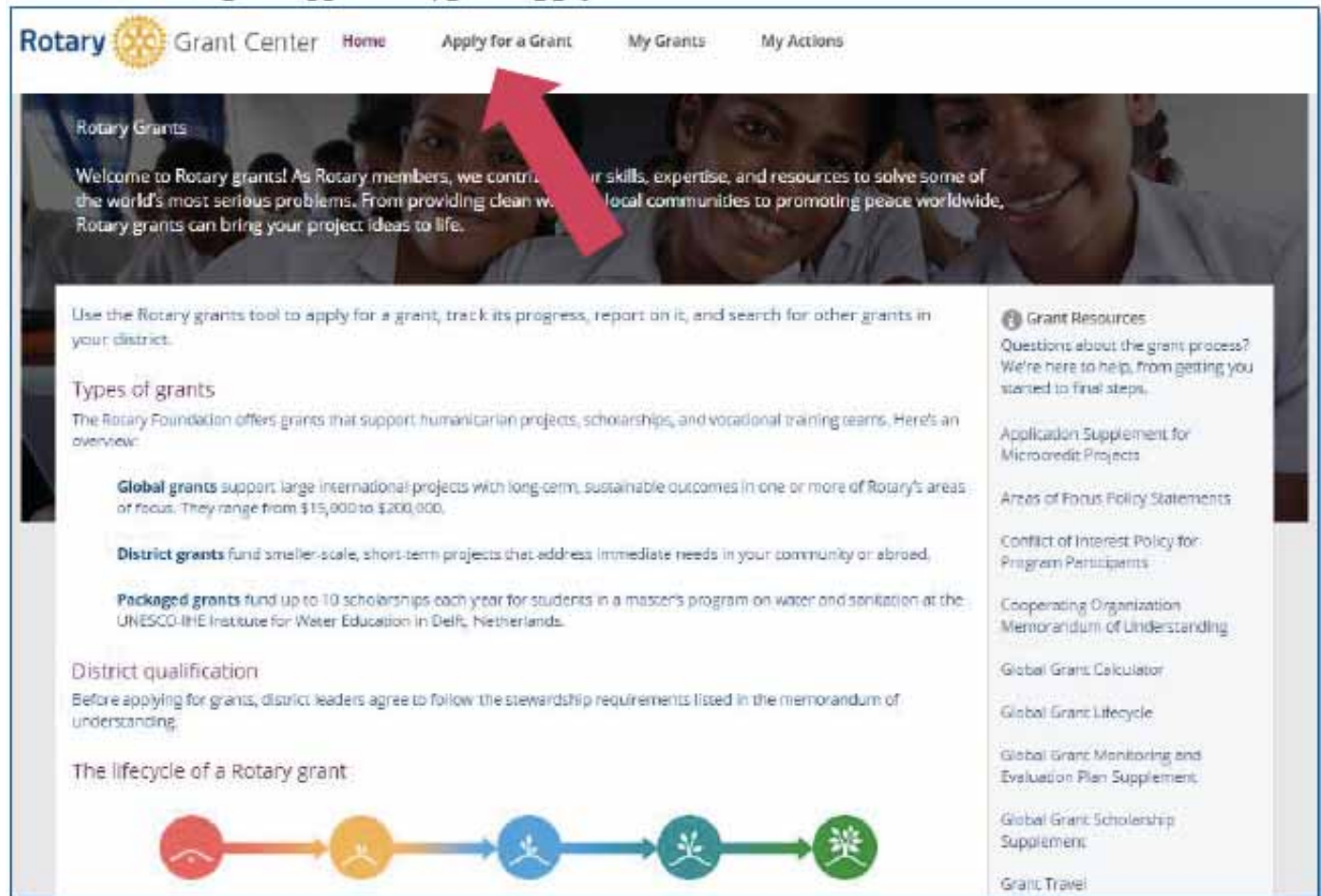
Clubs work directly with their District to get funding.

District Governor or District Rotary Foundation Chair should be able to tell you when to submit a request.



APPLYING FOR DISTRICT GRANTS

To start a District Grant application, go to **Apply for a Grant**.



The screenshot shows the Rotary Grant Center website interface. At the top, there is a navigation bar with the Rotary logo, 'Grant Center', and links for 'Home', 'Apply for a Grant', 'My Grants', and 'My Actions'. A red arrow points to the 'Apply for a Grant' link. Below the navigation bar is a banner image of three smiling young girls with the text: '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 to local communities to promoting peace worldwide, Rotary grants can bring your project ideas to life.'

Below the banner, there are several sections:

- 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.
- District qualification**
Before applying for grants, district leaders agree to follow the stewardship requirements listed in the memorandum of understanding.
- The lifecycle of a Rotary grant**
A horizontal flowchart with five circular icons connected by arrows, representing the stages of a grant: 1. A red circle with a white outline. 2. An orange circle with a white outline. 3. A blue circle with a white outline. 4. A teal circle with a white outline. 5. A green circle with a white outline.

On the right side of the page, there is a 'Grant Resources' section with a list of links:

- 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 Calculator
- Global Grant Lifecycle
- Global Grant Monitoring and Evaluation Plan Supplement
- Global Grant Scholarship Supplement
- Grant Travel



APPLYING FOR DISTRICT GRANTS


Only District leaders can apply for District Grants. If you're not currently serving as a district leader, the District Grant option won't be available under **Choose the type of Grant you're applying for**. If it is, choose **District Grant** from the list at the bottom of the page and click or tap **Let's begin!**

Apply Now

Begin the grant application only after your club or district 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:

District Grant [2017/2018] ▾ Let's begin!



APPLYING FOR DISTRICT GRANTS

Districts must establish a Grant Committee of three Rotarians, including the **District Governor of the implementation year, the District Rotary Foundation Committee Chair, and the District Grants Subcommittee Chair.**

These three Committee members are responsible for submitting and authorizing the District Grant application.

All District Grant applications must be received before 15 May of the Rotary year for which the funds are requested. (For example, applications for 2018-19 district grants must be received by 15 May 2019.)



APPLYING FOR DISTRICT GRANTS

In the **Bank Account** tab, choose the Country where the District's bank account is located.

The screenshot shows a web interface with three tabs: "Spending Plan", "Bank Account" (which is selected and highlighted), and "Authorizations". Below the tabs is an information box with an 'i' icon and the text: "Click 'Save & Exit' at the bottom of any tab to save your progress and return to the application later." Below this, there are two dropdown menus: "Location of the bank account:" with "--Please Select--" and "Pay to:" with "District". A paragraph of text follows: "Identify two Rotarians from your district who will serve as the signatories for this account. These individuals will receive an email notification that they have been added as bank account signatories for this grant. Rotarians who do not have a valid email address listed in Rotary's membership records will not appear in search results." Below this is a table titled "Account Signatories" with columns for "No.", "Name", and "Club". There are two rows, each with an "Add" button to its right. At the bottom of the form are three buttons: "Save & Exit", "Messages", and "Save".

No.	Name	Club	
1			Add
2			Add

APPLYING FOR DISTRICT GRANTS

Use the Add button to designate two Rotarians from your District who will serve as signatories for the **Bank Account**.

Bank address (line 1):

Bank address (line 2):

Bank address (line 3):

Bank city:

Bank state:

Bank postal:

Identify two Rotarians from your district who will serve as the signatories for this account. These individuals will receive an email notification that they have been added as bank account signatories for this grant. Rotarians who do not have a valid email address listed in their membership records will not appear in search results.

Account Signatories

No.	Name	Club	
1			<input type="button" value="Add"/>
2			<input type="button" value="Add"/>

APPLYING FOR DISTRICT GRANTS

Check the box to authorize the application, and click or tap **Save & Exit**. When you authorize the application, an email notification will be sent to the other District leaders.

Role	Name	Date Authorized
<input type="checkbox"/> District Governor (DG)		
<input type="checkbox"/> District Rotary Foundation Chair (DRFC)		

By clicking this box, I affirm that I am an authorized representative and have the authority to act on behalf of the Rotary District to which I belong. I further affirm that I have read and agree to this Agreement, including the Terms and Conditions for Rotary Foundation District Grants and Global Grants.

Authorization not permitted until the items listed at the top of this page have been completed.

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

IMPLEMENTATION & REPORTING

All Grant projects and activities funded by District Grants must be completed within 24 months of disbursement by the Foundation.

If unused grant funds exceed US\$500, remaining funds must be returned to The Rotary Foundation and will be credited to the DDF.

Final reports documenting the disbursement of funds must be submitted to the Foundation within 12 months of receiving the payment, or within two months of the Grant's total disbursement.



DISTRICT GRANT LIFECYCLE

Application Phase

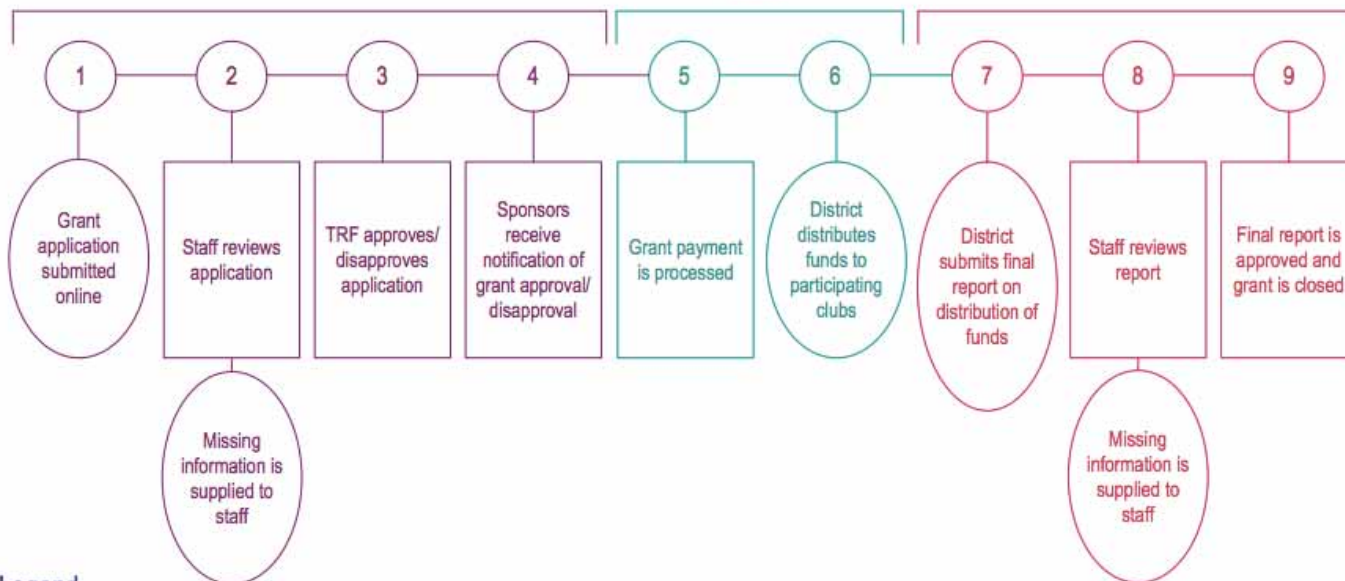
Applications are accepted during the planning and implementation years. Applications must be received before 15 May of the Rotary year for which the funds are requested (implementation year).

Payment Phase

Payment information is due by 15 May of implementation year. Funds will be released after 1 July of the implementation year once all payment requirements are fulfilled and the previous Rotary year's district grant is closed.

Reporting Phase

Final report documenting the disbursement of funds must be submitted to TRF within 12 months of receiving the payment, or within two months of the grant's total disbursement.



Legend

○ = Rotarian action

□ = TRF action

ROTARY GRANTS STAFF

DISTRICT 2452

ARMENIA, BAHRAIN, CYPRUS, GEORGIA, JORDAN,
LEBANON, PALESTINE, SUDAN, UNITED ARAB EMIRATES

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Rotary



BE THE
INSPIRATION

THANK YOU 😊



Ahmad Hussein

ARRFC Zone 20B 2018-2019

DDG Lebanon 2017-2018

Rotary Foundation Country Chair 2015-2017 and 2018-2019

Assistant Governor 2014-2015

District Conference Secretary 2013-2014

Past President Rotary Club of Tripoli-Maarad # 50064

Rotary

