Grant Management Seminar

Rotary District 6200
2023-2024
Module # 2 ~ Global Grants

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Seminar Procedure

- Watch a Module video.

- Take the Module review quiz – you will need to use Survey Monkey to take the quiz. (Link to Survey Monkey found on District 6200 Website ~ www.rotary6200.org)

- After you have successfully completed all three Modules, email Frank Bradshaw, rotary6200@lusfiber.net with your name, club, and 2023-2024 club leadership position.

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Global Grants

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Global Grants

- Large-scale, long-term projects
- Minimum total budget of $30,000 US
- Sustainable, measurable outcomes
- Align with Rotary's "Areas of Focus"
- International partnership involving Rotary Clubs in at least two Rotary Districts
- World Fund match

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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

ROTARY'S SEVEN AREAS OF FOCUS
Rotary

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Sustainable Projects

Giving a community the skills and knowledge to maintain project outcomes for the long term ~ after grant funds have been expended.

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Applying for and Implementing a Global Grant

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Global Grant Applicaltions

- Applications submitted online:
  - www.rotary.org/grants
- No Rotary Foundation application deadlines
- Submit applications at least 90 days prior to travel if travel planned

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Project Design ~ Planning for Success

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Successful Grant Projects

- Meet community needs
- Are sustainable
- Are measurable
- Involve a partner
- Have an implementation plan
- Maintain proper stewardship of funds

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Community Needs Assessment

- Base projects on communities' needs
- Determine what resources your club and potential partners have
- Talk to the community

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Needs Assessment ~ Resources

Communities
IN ACTION
A Guide to Effective Projects

COMMUNITY
ASSESSMENT
TOOLS
A resource for Rotary projects

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Partners

- Rotary Conventions
- Project Fairs
- LinkedIn and Facebook
- Rotary Events
- www.matchinggrants.org/global
- www.rotary.org

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Setting Goals

- Measurable
- Sustainable
- Qualitative
- Quantitative
- Gather baseline data
- Determine method of measurement

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Creating a Budget

- Realistic
- Competitive bidding
- Reasonable prices
- Disclose any conflicts of interest that might exist

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Conflict of Interest

- Exists when a Rotarian benefits financially or personally from a grant
- Benefit can be direct to the Rotarian or indirect to an associate of the Rotarian

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Global Grant Financing

- Minimum budget for a Global Grant is $30,000 US
- Rotary Foundation will provide an 80% World Fund match for all District Designated Funds (DDF) contributions
- The maximum World Fund match is $400,000; there is no minimum
- Rotarian and non-Rotarian cash contributions are **NO LONGER** matched with 50% with World Fund

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Global Grant ~ Financing Guidelines

- International Sponsors provide at least 15% of total sponsor funding
- Funds cannot be raised from beneficiaries or cooperating organizations in exchange for a Global Grant
- Funds cannot come from other Rotary grants
- Contributions credited to donor

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Implementation

- Communication
- Financial management plan
- Record keeping
- Following original plan

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Evaluation

- Assists with reporting
- Improves future projects
- Is based on goals
- Is ongoing
- Identifies successes

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Oversight and Reporting

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Stewardship

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

- Reporting any irregularities
- Rotarian supervision
- Financial records review
- Oversight of funds
- Timely submission of reports

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Financial Management Plan

- Bank account for funds
- Distributing funds
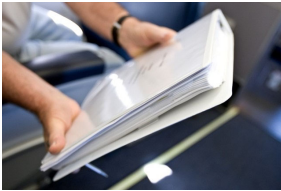- Use checks or bank cards to track funds
- Detailed ledger

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Document Retention

- Provide access to documents for transparency
- Retain for a minimum of five years
- Make copies

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Reporting Requirements

Reporting:
- Verifies grants were managed properly
- Provides valuable data for your Rotary Club, partners, and Rotary

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Global Grant Reports

Timeline for reporting:
- Progress reports within 12 months of first payment
- Every 12 months throughout the term of the grant
- Final report within two months of completion

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Global Grant Reports

Your Global Grant report should include:
- How the partners were involved
- Type of activities
- Evaluation of project goals
- How areas of focus goals were met
- How funds were spent
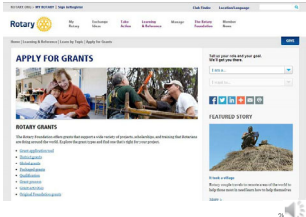- Number of beneficiaries and how they benefited

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Resources

- www.rotary.org/myrotary/grants
- www.rotary6200.org
- Rotary Learning Center
- Training materials

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Module # 2 - Complete

- Take the Module # 2 review quiz – you will need use the Survey Monkey link to take the quiz.

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