



Foundation Grants 2024-25

Learning Module 1:

Purpose and Types of Rotary Grants

Rotary District 7010

March 2024

Objectives of this Module

The
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1. Explain the purpose of The Rotary Foundation (TRF) and Foundation grants.
2. Learn how TRF is funded.
3. Learn how the District decides to spend its Foundation funding.
4. Understand differences and similarities between Rotary Foundation grants.
5. Learn how Rotary Clubs can apply for and participate in Rotary Foundation grants.

What is The Rotary Foundation?



- TRF is a Not-for-Profit corporation.
- TRF is independent of Rotary International and is run by a separate Board of Trustees.
- TRF Funds humanitarian work of Rotary beyond the club.
- TRF is entirely funded by donations (not from District dues or RI dues).
- All donations from Canadian clubs are made through TRF (Canada).

Why is it important?



TRF and Foundation grants fund Rotary's humanitarian work locally and across the globe.

- Completion of and Rotarian participation in grants puts a “face” on the work of Rotary and TRF.
- Service is one of the most important aspects of why people join and stay in Rotary.
- Involvement in projects supported by grants has been shown to increase Club participation and feeds into increased Foundation giving.
- Grant funding accountability allows for strong stewardship of the Fund. This give TRF a high rating with charitable monitoring agencies.

How are Rotary Foundation dollars raised?



Give to any or all of:

1. **Annual Fund** – contributions are SHARED between the World Fund and District Designated Funds (DDF); after 3 years, 50 % is returned to the District based on the total contributions from District 7010 Clubs and Rotarians.
2. **Polio Plus** -- all donations to Polio Plus are used immediately to help eradicate polio wherever needed.
3. **Endowment** – earnings from the endowment fund support the World Fund and currently help pay for the Rotary Peace Centers.
4. **Specific Targeted programs** - Rotary Peace Centres, Disaster Relief fund, specific global grant projects.

How are Donors to the Rotary Foundation Recognized ?



Donors are recognized by the following giving levels:

1. **Sustaining Member** – give US\$100 annually
2. **Paul Harris Fellow** – when donations reach US\$1000
3. **Paul Harris Society** – pledge \$1000 USD annually

Every Rotarian Every Year – give a donation annually

Donors who pledge \$1,000 USD in planned giving to the **Endowment Fund** are **Benefactors**; those who pledge \$10,000 USD or more are **Bequest Society** members.

Giving is an individual journey that can be specifically designed and targeted to respond to a donor's interests. TRF staff can help design an individual giving program.

How are Rotary Foundation dollars allocated?



The Annual Fund – contributions are SHARED between the World Fund and District Designated Funds (DDF) which are returned to the Districts based on their contributions.

Endowment – earnings off the endowment fund support the World Fund and help pay for the Rotary Peace Centers.

Each District receives 50% of all donations from within the District to the Annual Fund 3 years later. Similarly, our District receives interest from donations made to the Endowment Fund if they are directed through the Share program to our District.

What is District DDF?

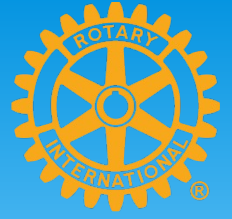


District Designated Funds (DDF): Half the monies Rotarians and Clubs in the District donate to the Annual Fund (via Annual Giving), and earnings from the money they donate to the Endowment Fund are tallied and “come back” to the District three years later to be spent as directed by the District with input from the clubs.

The other half of these donations go to the TRF World Fund to support global grants and other Rotary Foundation programs.

Who Decides How DDF is Spent?

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The District Governor Elect and the District Foundation Chair, with input from the Foundation Committee, make recommendations on how DDF will be spent for the following year. This decision is approved by the Executive and presented at the AGM.

Rotary International may contact the District to ask for donations to various areas (e.g. Polio).

Decisions on global grants are made by the District Governor and the District Foundation Chair in consultation with the District Foundation Committee and the Executive.

No decisions on the use of funds are made by one individual.

Let's Talk about Foundation Grants



There are two kinds of Rotary Foundation Grants funded by DDF:

- **District Grants.** Based on the District's previous level of giving to TRF, up to 50% of DDF is made available for clubs to spend on local or international humanitarian projects.
- **Global Grants.** These humanitarian grants represent a partnership between a minimum of two Rotary clubs in two countries/districts. Club cash from 7010 clubs is "matched" to a set limit with DDF. The DDF funds are "matched" by TRF from the World Fund to fund these grants.

You will learn more about each of these Grant types in future modules and in various documents.

Global Grants and District Grants

How are the projects similar?

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- ❖ Both grant types support projects locally OR internationally.
- ❖ Global Grants must fall within one of Rotary’s seven “Areas of Focus”
- ❖ Global Grant projects must be sustainable. This means the:
 - Projects must be financially sustained throughout and after completion of the project.
 - Supplies should be locally sourced if possible.
 - Local people should be able to maintain the program after Rotarians complete their involvement in the grant.
- ❖ Both types of grants involve \$\$ “matches” from the District (in case of Global Grants District funds are matched from TRF).
- ❖ Both require similar Club qualifications, reporting and financial management (you will learn more about these later).

Disaster Response Grants



- ❖ Rotary disaster response grants are funded by contributions of DDF from Districts around the world or from individual Rotarians made to the Rotary Disaster Response Fund.
- ❖ Districts that have been affected by natural disasters can use Rotary disaster response grants to launch their own projects or work with established relief organizations to help their communities recover. Grant funds can be used to provide basic items such as water, food, medicine, and clothing.
- ❖ Districts in an affected area or country may apply for a maximum grant of \$25,000, based on the availability of funds. A district may apply for subsequent grants after it successfully reports outcomes from previous grants. Districts work with clubs to distribute the funds where they are needed most.

Global Grants

What are the Areas of Focus?



Global grants must fall within one of Rotary's "Areas of Focus." Be sure to read the "Areas of Focus Policy Statements" found on our district website under Foundation for specific details!

The Areas of Focus are:

Basic Education and Literacy
Water, Sanitation and Hygiene
Maternal and Child Health
Disease Prevention and Treatment
Community Economic Development
Peacebuilding and Conflict Prevention
Environment

Global Grants and District Grants: How are they different?



- **Size.** District grants are maximum \$CDN 3000 (with up to three being eligible for \$CDN 5,000); Global Grants start at US\$30,000
- **Partnership.** Global Grants require a partnership between two clubs in two different countries; District grants are stand-alone projects, managed by clubs and can be for local and / or international activities and projects.
- **Application Process.** Before applying for a Global Grant, an online [Intent to Submit a Global Grant Form](#) must be completed and reviewed by Global Grants Chair Kim Giffen.
- When applying for a District Grant, a mentor will be assigned by District Grants Chair Drew Markham.

Global Grants and District Grants: How are they different?



- **Acceptance and Review.** Both grants are reviewed by a District committee; then by TRF with final approval from The Canadian Rotary Foundation.
- **Timing** District grants are annual projects that must be applied for by June 1st 2024 and completed by June 1st 2025. Global Grants can be applied for at any time.
- **Community assessment and evaluation.** Global Grants **MUST** start with a comprehensive assessment of community needs and measurable goals, and end with an evaluation that determines how well the grant has met those goals. District grants do not require a community assessment, but it is a helpful tool for selecting effective projects.

Global Grants and District Grants: How are they different?



- **Funding.** Funding for District grants comes from an allocation of DDF (50% of donations from 3 years prior) divided between applications. Global Grants are funded by club funds, matched by available DDF. DDF funds are matched by TRF from the World Fund.
- **Reporting Requirements.** Global grants are monitored by TRF staff and have reporting deadlines throughout the grant term that must be completed. District grants require only one application and one final report and are monitored by the District Grant Committee.
- **Managing Funds** Separate bank accounts must be maintained for both Global and District grants. For global grants the money should be managed by the District 7010 lead Rotary club until it is turned over to the Host Club or TRF to initiate payments

District and Global Grants: How does my club “qualify” to participate?



Each year, District 7010 requires each club to be “certified ” to receive grants by doing six things:

- Two club members must complete the appropriate Grants training.
- Appoint a Club Foundation Chair and input the name into ClubRunner. If the Foundation Chair is vacant, the incoming President will fill the role.
- Establish goals to support both the Annual Fund and Polio Eradication on Rotary Club Central.
- Club President and President-Elect must sign and implement the [Club Memorandum of Understanding](#) (MOU) listing qualified member(s). If succession planning is incomplete, the second signature should be from a member with signing authority, and preferably on the club’s Executive Committee.
- The club must be current with District and RI dues.
- Clubs must have previous District Grants reports submitted and approved. Global Grant reporting must be in order.

District and Global Grants: Which Rotarians can complete Grant applications?



To be certified to apply for District Grants two (2) members from a club must review this module (Module 1) and the District Grant module (Module 2), and successfully complete/submit the associated online quizzes.

To be certified to apply for a Global Grant a member must review this module (Module 1) and the District Grant module (Module 2), successfully complete the associated online quizzes. In addition, they must complete the Grant Management Seminar (or the Grant Management Recertification in subsequent years) in the Learning Centre [My Rotary] and submit their Certificate to the Global Grants Chair Kim Giffen (kmgiffen3@gmail.com).

District and Global Grants: How does my club maintain its qualification?



Each year, District 7010 requires each club involved in writing Grants to:

- Follow the terms of the [MOU](#).*
- Appoint a club member/committee to manage club qualifications.
- Fully implement stewardship practices to prevent misuse of funds.
- Ensure that all reporting is done in a timely and detailed manner.
- Utilize the resources supplied by TRF (appropriate Cadre, modules on the Rotary Learning Centre) to ensure the grant application is complete.

* The MOU is located on the District website under Resources/Tools > [Foundation Grants Certification Training](#) page.

District and Global Grants

What does the Club Foundation Chair do?

- * **Educate** club members about The Rotary Foundation
- * **Set Goals** in Rotary Club Central
- * **Promote** and assist with giving
- * **Engage** Club in programs
- * **Recognize**
 - * Paul Harris Fellows/Paul Harris Society
 - * Major Donors
 - * Bequest Society members

Rotary Foundation

District 7010 Resources



Rotary District 7010 Foundation Committee

Foundation Chair

PDG Margaret Walton

Global Grants Chair

Kim Giffen

District Grants Chair

Drew Markham

Scholarship Chair

Linda Brouillette

Fundraising Chair

John Mullen

Polio Eradication Chair

David Tisch

Stewardship Chair

PDG Bryn Styles



[Please address all questions to the Rotarians listed above.](#)

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Please proceed to complete the

[Purpose and Types of Rotary Grants Quiz](#)

before proceeding to Learning Module Two.