

**IMAGINE
ROTARY**

2022-23 GRANT MANAGEMENT SEMINAR

Rotary District 7600

February - March 2022

THE DISTRICT 7600 GRANTS COMMITTEE (2022-2023)

DRFC: John Padgett
jpadgett@mcguirewoods.com

Grants Chair: Shel Douglas
sheldouglas1@gmail.com

DISTRICT GRANT TEAM

Raghavan Sadagopan (Chair)	Rotarian.Raghavan@gmail.com
Al Mink	almink@systemsspirit.com
Lee Harris	harris2806@comcast.net
Sarah Saville	sarahmsaville@gmail.com

GLOBAL GRANT TEAM

Shel Douglas (Chair)	sheldouglas1@gmail.com
Ray Spencer	rspencer@jamesriverarchitects.com
Adeeb Hamzey	adeeb.hamzey@gmail.com
Al Mink (Reporting Officer)	almink@systemsspirit.com

Scholarships Chair: Mike Little
mwlittle@vcu.edu

GMS OBJECTIVES

By the end of today, Participants will be familiar with

- The types of grants that can be funded
- How the District receives the funding for grants
- How to secure DDF for a Global Grant project
- How to apply for a District Grant
- Where to enter the Club's Foundation Goal on myrotary.org
- Observe a live grant application & reporting demonstration in DACdb.com

SOME FOUNDATION BASICS

Mission: The Rotary Foundation helps Rotarians to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty.

Financial Structure: The Rotary Foundation is organized as a public charity operated exclusively for charitable purposes and governed by a Board of Trustees. The operations of Rotary International, a member organization, are overseen by its Board of Directors.

Rotary International

The Board of Directors establishes policy for Rotary International and provides guidance that helps our clubs thrive. Clubs elect the members of the Board every year at the Rotary International Convention, and each director serves for two years.

Rotary Foundation

The Board of Trustees manages the business of The Rotary Foundation, the charitable arm of our organization that funds service activities. The RI president-elect nominates the trustees, who are elected by the RI Board to four-year terms.

SOMETHING TO BE PROUD OF



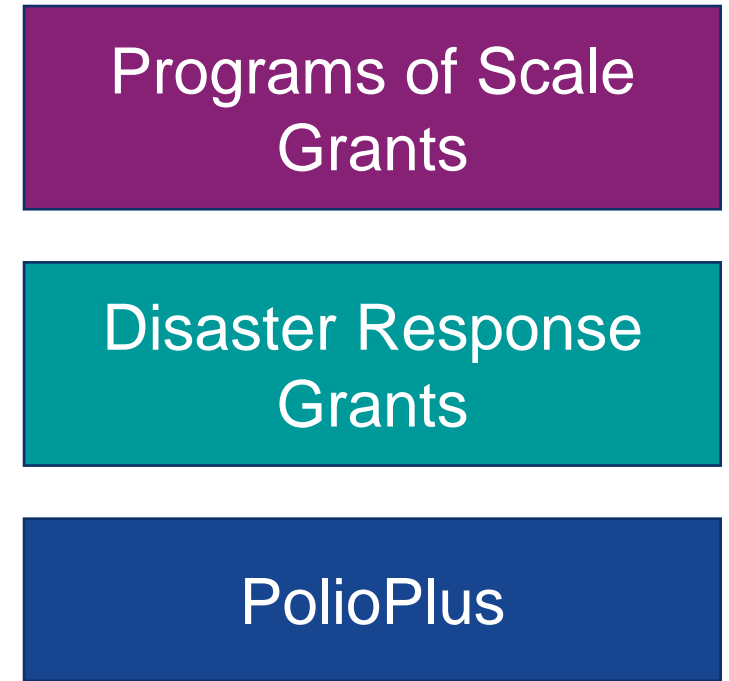
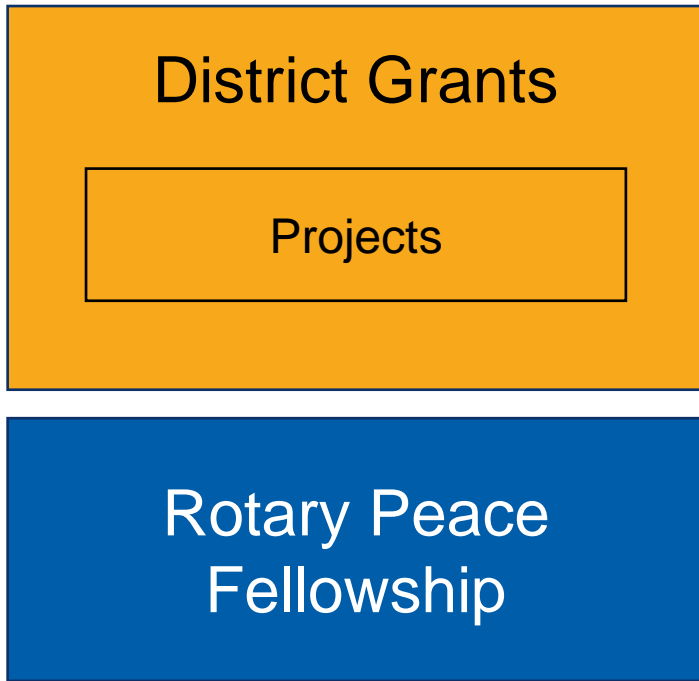
4
star charity - Charity
Navigator's highest level



91%
of funds are spent on
program awards and operations



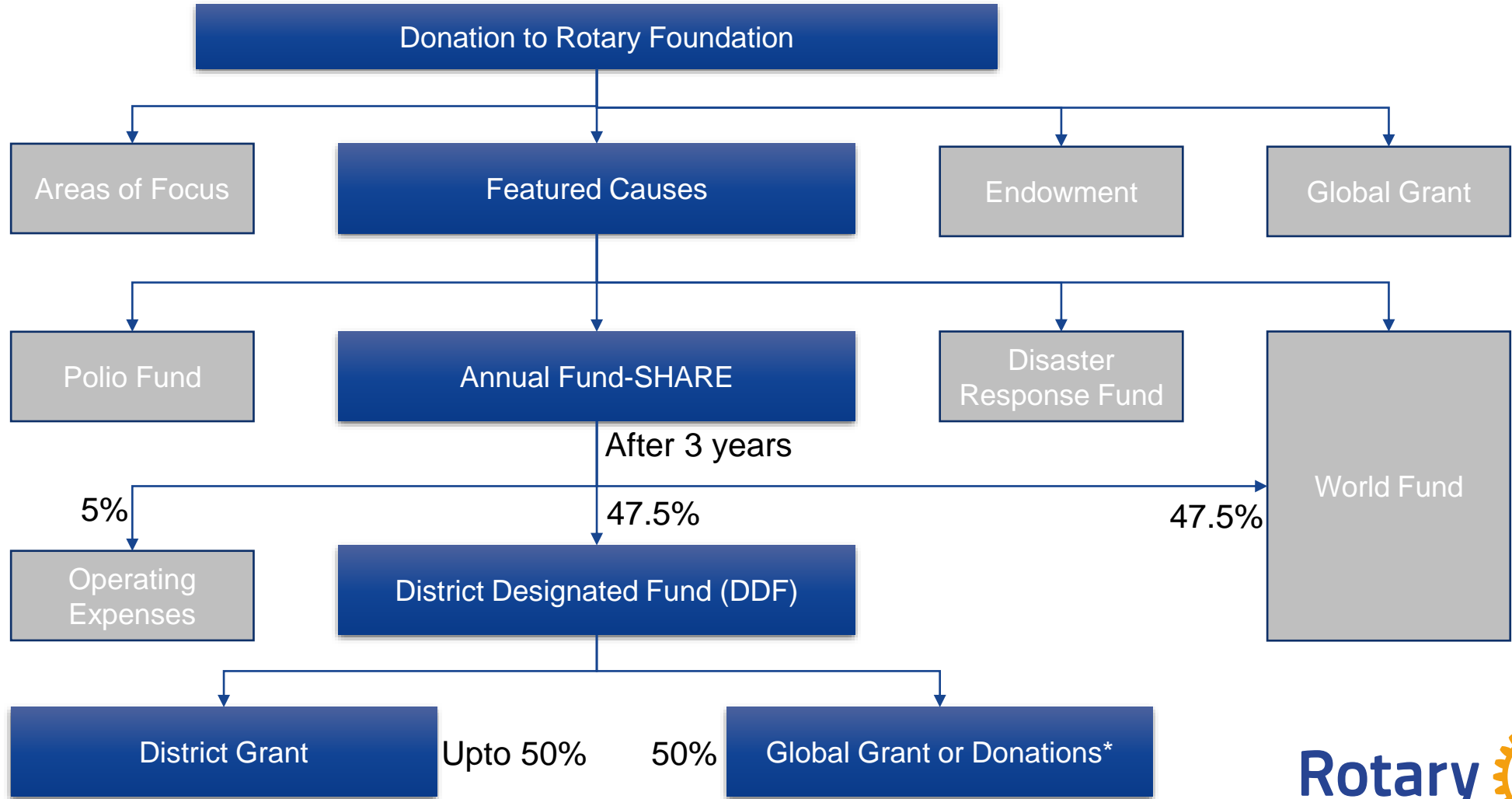
ROTARY FOUNDATION PROGRAMS



DISTRICT DESIGNATED FUNDS

HOW DOES THE DISTRICT GET THE FUNDING?

The DDF is based on the District contribution to the Rotary Foundation three years ago



*Donation options include PolioPlus, peacebuilding programs, pooled endowed funds, the World Fund, Disaster Response Fund, or another district.

DDF IN 2022-23 ROTARY YEAR

- 2019-2020 D7600 gave \$515,286 to TRF
- 2022-2023 DDF will be ~\$247,761
- Available for District Grants ~\$122,380 (**decrease of ~\$20,000 from last year**)
- Available for Global Grants ~\$122,380 + *Carryover from prior years*

GRANTS

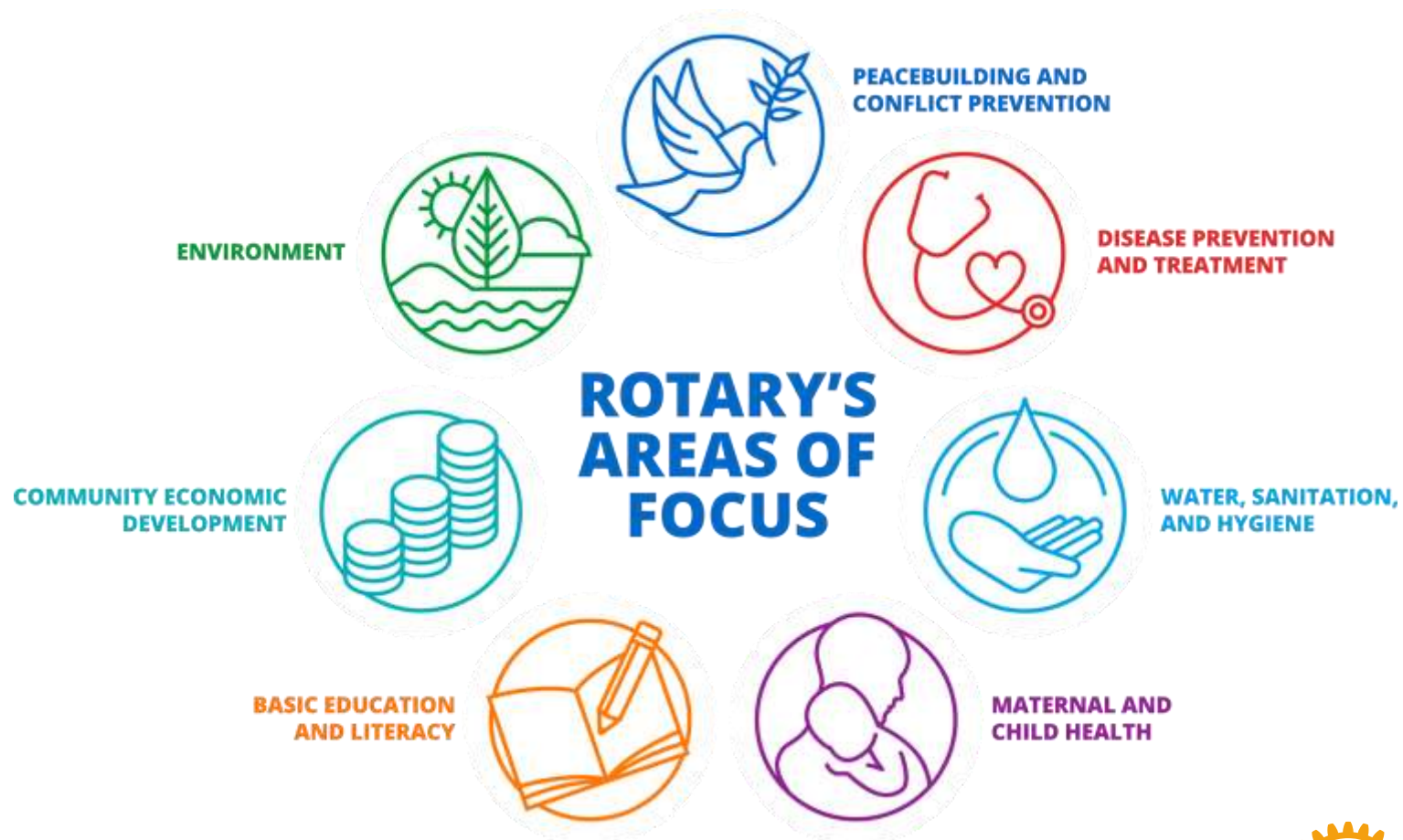
DISTRICT GRANT VS GLOBAL GRANT

District Grants

Fund smaller-scale, short-term projects that address immediate needs in your community or abroad. They range < \$30,000

Global Grants

Support large international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus. They range from \$30,000 to \$400,000



GLOBAL GRANT

GLOBAL GRANTS CAN FUND

- Humanitarian projects
- Scholarships for graduate studies
- Vocational training teams



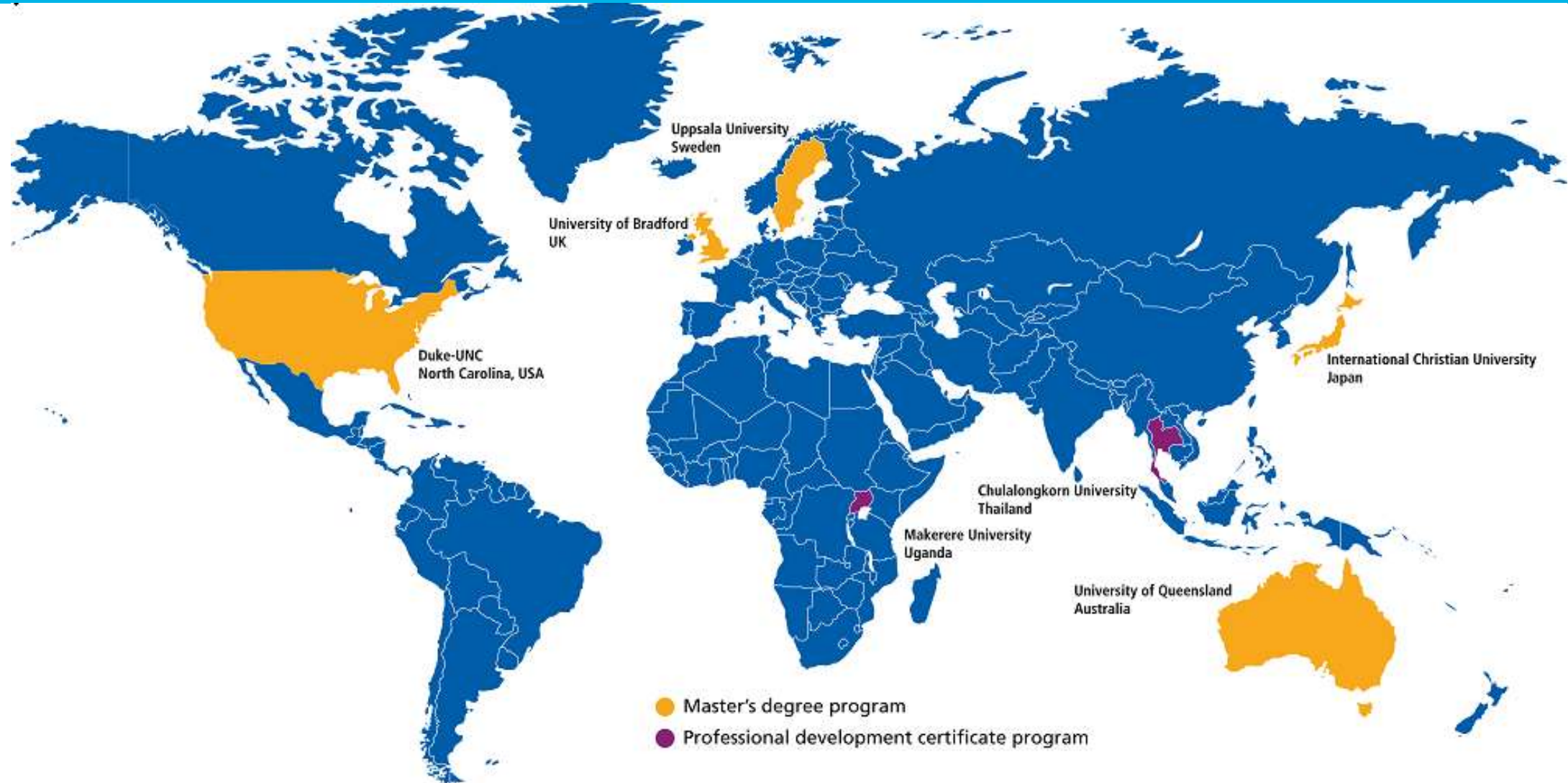
HOW TO SECURE DDF FOR YOUR PROPOSED GLOBAL GRANT

- Review your proposed budget with Global Grants Committee
- Make individual and club donations to the Annual Fund in “honor” of the grant project.
- DRFC can approve DDF to replace “honored” giving (Cash Exchange Method-as funds available)
- Need more info? Ask

Rotary -building a network
of future leaders in the
world community through
Global Grant Scholars and
Peace Fellows



ROTARY PEACE CENTERS



ROTARY SCHOLARSHIPS & PEACE SCHOLARS

Step 1: Application

- Contact Mike Little, District Subcommittee Chair mwlittle@vcu.edu to determine if candidate is eligible to be endorsed by Rotary District 7600. Must be prior to May, 2022. All Global Grant Scholar funding must be approved by John Padgett, District Foundation Chair.

Step 2: Submission

- Complete the application from the rotary.org website and download. Submit to District Subcommittee chair for review by May 31st, 2022. An interview is arranged with subcommittee with endorsement of local club

Step 3: Review

- Application is reviewed by the District Subcommittee. Recommendation forwarded to candidate and/or the Rotary Foundation in Chicago, ILL. by July 1st. Decision is made by November 2022 after world-competitive process

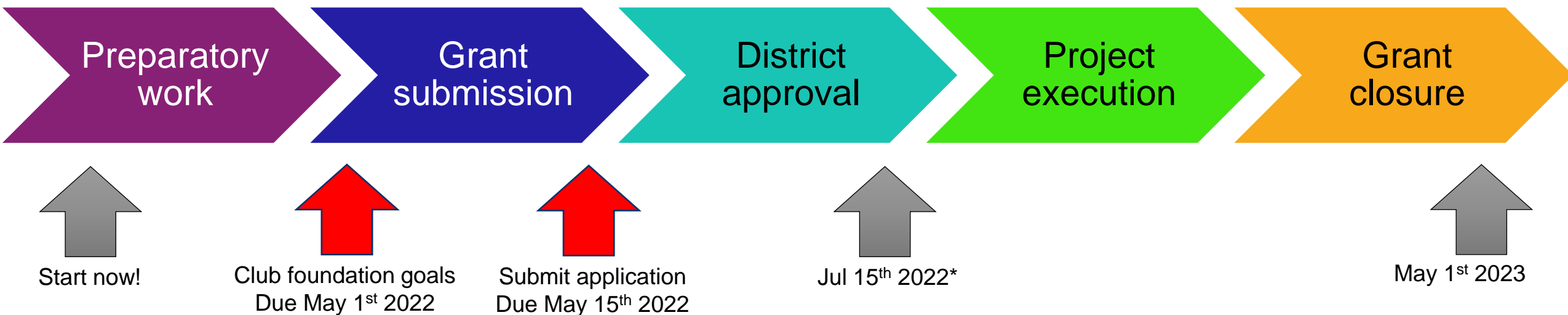
Michael W. Little (804) 350-0084 mwlittle@vcu.edu
District 7600 Subcommittee Chairperson

DISTRICT GRANT

WHAT IS A DISTRICT GRANT

- Small scale, short-term activities in your communities and abroad
- Overall Project budget < \$30,000
- Same areas of focus as global grants
- \$5000 per Rotary Club; \$2500 per Rotaract; \$1500 per Interact Club
- Max \$25,000 DDF towards project

DISTRICT GRANT LIFECYCLE



* TRF Block Grant approval and receipt of funds from TRF (Timing contingent upon TRF)

LIFECYCLE: PREPARATORY WORK

Preparatory work

Grant submission

District approval

Project execution

Grant closure

- Each Club must execute a Memorandum of Understanding (“MOU”) AND upload the executed MOU(s) to DACdb
- The 2022-23 Rotary Club President (current PE) must submit the club’s 2022-23 Foundation Goals in Rotary Club Central before May 1, 2022
- Have at least one club member attend a Grants Management Seminar (“GMS”)
- Develop a project based on an identified “**Community Need**”
- Use the **Grants Module in DACdb** to apply for the Grant. Add the required Email signatories for the year 2022-23 in DacDB
- **Close out any open Grants from the past year**
- No repeat projects



LIFECYCLE: GRANT SUBMISSION

Preparatory work

Grant submission

District approval

Project execution

Grant closure

Project Budget = District Contribution + Club Contribution

- District contribution
 - \$5000 limit per Rotary club
 - \$2500 limit per Rotaract Club
 - \$1500 limit per Interact Club
 - Maximum of 5 Rotary Clubs
 - Maximum of 2 Rotaract Clubs
 - \$25,000 DDF max per project
- Club contribution
 - At least 10% of the project cost

Plan a budget

Use Zero-based budgets and be sure to include estimates/documentation of requested expenses

CONSIDER PARTNERING with a Rotaract Club or Interact Club

Document how ALL CLUBS WILL BE ENGAGED IN THE PROJECT

LIFECYCLE: GRANT SUBMISSION

Preparatory work

Grant submission

District approval

Project execution

Grant closure

- Target a project within the Rotary areas of focus
- Document how the project is sustainable
- All participating clubs are in good standing with RI
- Each Club must execute a Memorandum of Understanding (“MOU”) AND upload the executed MOU(s) to DACdb. That means: Print, sign, scan, & upload (Rotary/ Rotaract/ Interact)
- Lead club completes Grant Module in DACdb before May 15th 2022

LIFECYCLE: DISTRICT APPROVAL

Preparatory work

Grant submission

District approval

Project execution

Grant closure

- District Grants Committee reviews each grant on a first come first serve basis and approves all or part of the club grant
- A Spending Plan is created, noting each approved club grant, and sent to TRF for approval
- TRF sends District Grant funds to the District as a block grant
- District 7600 funds Club grants per the approved Spending Plan

**Do not start the Project before
receiving the Grant money from
the District**

**DDF contribution will be issued around
August 1st**

LIFECYCLE: PROJECT EXECUTION

Preparatory work

Grant submission

District approval

Project execution

Grant closure

- Wait to start the Project until TRF approves the District Spending Plan— generally around August 1st
- Contact the Grants committee if you need to change the scope of the project
- Keep records for audit purposes
- Do have a Public Image plan using Rotary Branding. **Publicity, publicity, publicity!**

LIFECYCLE: GRANT CLOSURE

Preparatory work

Grant submission

District approval

Project execution

Grant closure

- Clubs Submit final reports to District through DacDB
 - Copies of all Invoices & Receipts
 - Copies of both side of all checks
 - Pictures of the project
 - Details of Rotarian/ Rotaract/ Interact Engagement
- Maintain records for five (5) years
- District reviews the final report and closes the grant
- District submits final report to TRF

CONFLICT OF INTEREST POLICY

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

IMMEDIATE DEADLINE

- Before May 1st Close the 2021 – 22 District Grant
- Before May 1st Add club foundation goals in Rotary Club Central
- Before May 15th Submit the Grant application

KEY TAKE-AWAYS FOR EACH CLUB

- Sign & Upload the “MOU” or NO grant!
- Attend a GMS or NO grant!
- Enter GOALS by MAY 1 or NO grant!
- Submit grant application by May 15th or NO grant!
- Submit Final Report for 2021/22 grant by MAY 1, 2022 or NO grant!
- No repetitive projects or NO grant!
- Sustainability projects or NO grant!
- Do not start the Project before receiving the Grant money from the District
- Use the Grant to make a difference in your community

**DEMO: Entering
goals at ROTARY
CLUB CENTRAL**

HOW TO REPORT YOUR FOUNDATION GOALS ON MY ROTARY

1

- Dashboard
- Goal Center**
- Global View
- Service Activities
- Resources
- Reports
- Club Ratings
- Contact Us
- My Rotary

SETTINGS

Language ^

Rotary Club Central

Dashboard

Welcome to Rotary Club Central, the online tool for setting goals and tracking progress. Explore data and trends related to your club's goals on this page, and use the tabs to manage goals, project activities, and more. **Please note: data reported outside Rotary Club Central, including data reported in My Rotary, will be delayed for at least 24 hours.**

Global | My Zone | **My District** | All Club Groups v | All Clubs v

District 7600

Membership Trends

	2014-15	2015-16	2016-17	2017-18	2018-19
July 1	2.8k	2.78k	2.75k	2.71k	2.69k

Gender Trends

	2014-15	2015-16	2016-17	2017-18	2018-19
Female	653	665	645	670	673
Male	2.07k	2.08k	2.04k	2.01k	1.95k
Unreported	1	1	0	2	2

HOW TO REPORT YOUR FOUNDATION GOALS ON MY ROTARY

2

The screenshot shows the 'Goal Center' interface for a Rotary Club. The left sidebar contains navigation options: Dashboard, Goal Center, Global View, Service Activities, Resources, Reports, Club Ratings, Contact Us, and My Rotary. The main content area displays the club's name, a year selector (2018-19), and a list of foundation goals. Annotations include a red circle around the club group dropdown, a yellow callout box pointing to it, a red circle around the year selector, a yellow callout box pointing to it, and a red arrow pointing to the 'EDIT' button with a yellow callout box.

Find your club in the drop down list

Make sure the appropriate year is listed

Click edit to see the list of Foundation Goals

HOW TO REPORT YOUR FOUNDATION GOALS ON MY ROTARY

3

- Dashboard
- Goal Center**
- Global View
- Service Activities
- Resources
- Reports
- Club Ratings
- Contact Us
- My Rotary
- SETTINGS
 - Language

Rotary Club Central

2019-20 County Goals

Category	Achievement (USD)	OF	Goal (USD)
Annual Fund contributions	0		1,500
PolioPlus Fund contributions	0		2,000
Major gifts	0		0
Bequest Society members	0		1
Benefactors	0		1

May 1st is the due date for clubs participating in grants

Identify your club goals for all 5 Foundation Goals

Be sure to Save



DEMO: Grant Module on DacDB

Timeline for 2022-2023 District Grants

Activity	Responsibility	Due date
Club on-line applications available on D7600 database DACdb	Club	Available now
Final Reports for 2021 -22 due to District	Club	Now till May 1 2022
District Grant Policy & Timeline for 2022-23 available on 7600 website	District	February 20 2022
Grant Management Seminars for Rotary/ Rotaract Clubs	Club	February 19 2022 (9AM - 11AM) March 24 2022 (6PM - 8PM)
2022-23 Foundation Goals entered on MyRotary.org	Club	May 1 2022
Applications due to District Grants Subcommittee (no extensions of date)	Club	May 15 2022
District Grants Sub-committee review of club applications	District	May – June 2022
Submit spending plan to The Rotary Foundation (TRF)	District	June 2022
TRF Block Grant approval and receipt of funds from TRF (Timing contingent upon TRF)	District	July – August 2022
Announcement to clubs regarding Spending Plan	District	July – August 2022
Notify recipients of awards and issue checks to lead club upon receipt of block grant from TRF	District	August 2022
Implementation and completion of projects	Club	August 2022 – May 2023
Final Reports for 2022 -23 due to District	Club	May 1 2023

THANK YOU