



TRF and Global Grants

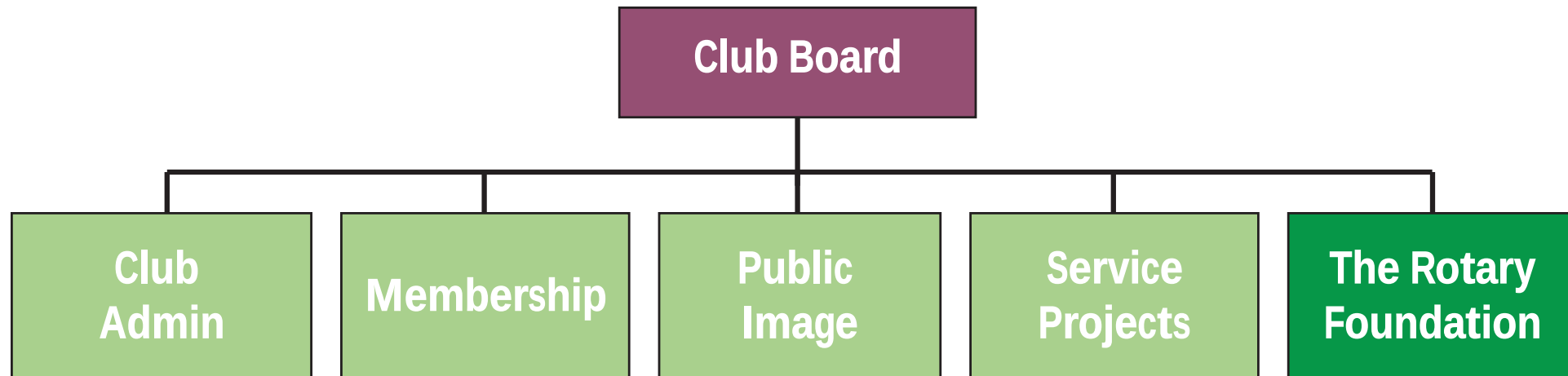
Habib Saba

13 November 2023

Content

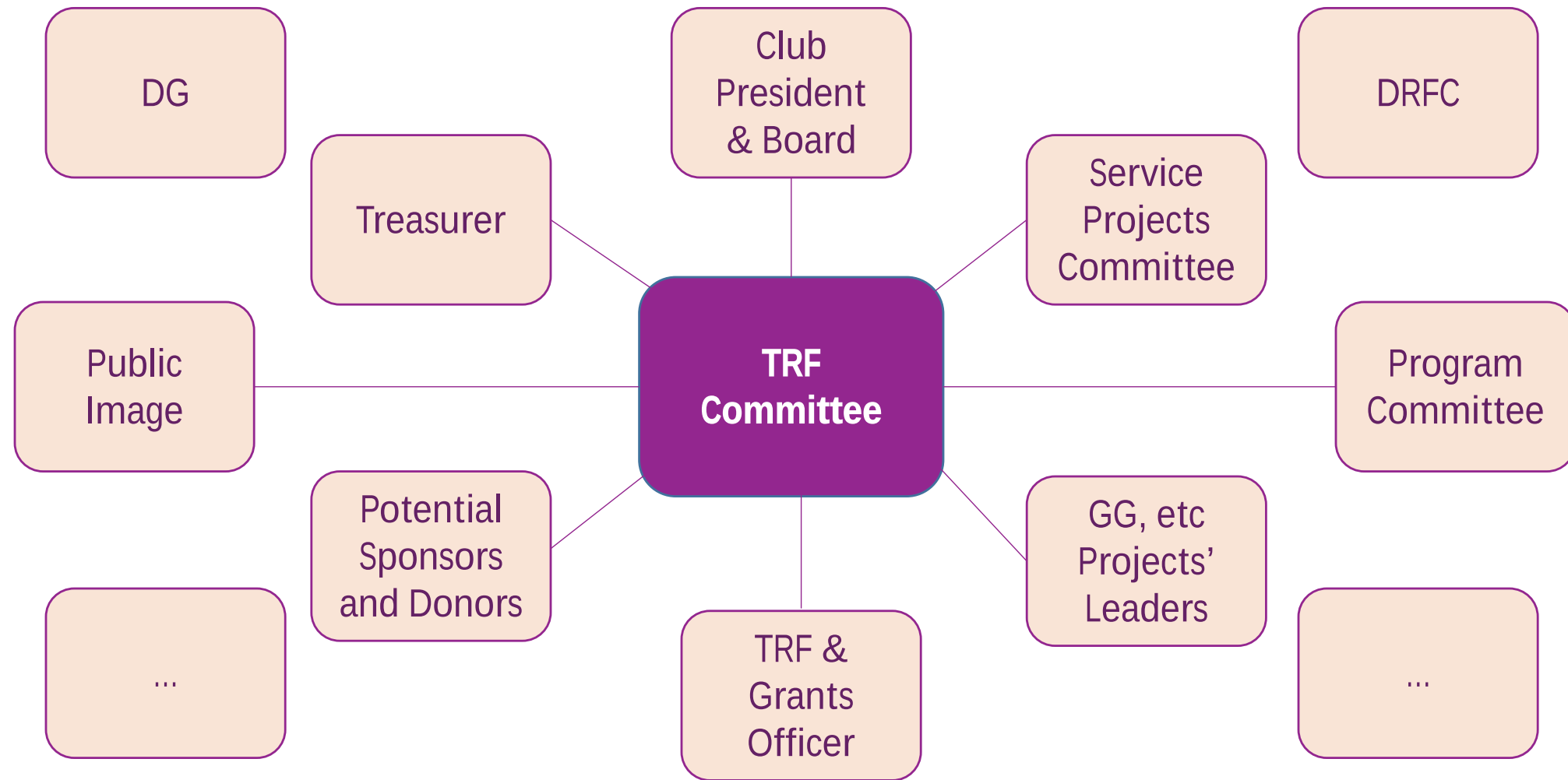
1. Context - The Rotary Foundation (TRF)
2. Global Grant (GG) Project and Process
3. My Rotary – Grant Center
4. Resources
5. Q&A

1. Context -The Rotary Foundation (TRF)



- **Foundation History:** *At the 1917 Rotary Convention, outgoing Rotary President Arch Klumph proposed setting up an endowment “for the purpose of doing good in the world”. The rest is history...*
- *“The Rotary Foundation helps Rotarians to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty”... **Opening sentence of the TRF Reference Guide***

1. Context -The Rotary Foundation (TRF)



1. Context - The Rotary Foundation (TRF)

1.1 Foundation Funding

1.2 Foundation Grants

1.3 Foundation Funds Flow

1.4 DDF Rollover Changes

1.5 Areas of Focus

1.1 Foundation Funding

- **Annual Fund-Share**
 - Primary Source of Funding for Activities
 - Every Rotarian, Every Year (**EREY**) is the key fundraising initiative to support the Annual Fund-Share
- **PolioPlus Fund**
 - Independent of Annual Fund-Share
 - Afghanistan and Pakistan Remaining
- **Disaster Response Fund**
 - Independent Annual Fund-Share
 - Supports relief and recovery efforts in **areas affected by natural disasters**
 - Accepts cash donations from individuals, clubs and DDF contributions
- **Endowment Fund**
 - Ensures long term viability of the Foundations Grants and Programs
 - Contributions are **invested in perpetuity**, the principal of gifts is never spent
 - Donations to the Endowment Fund tend to be of a **substantial size donation**

1.2 Foundation Grants

- **Rotary Peace Fellowships**

- Certificate in peace and conflict studies or a **Masters Degree** in a range of disciplines related to peace and security
- Obtained from one of **seven** Rotary Peace Center **Universities**

- **Disaster Response Grants**

- Relief and recovery efforts **within six months** of area affected by natural disaster
- Affected Districts that qualify may apply for grants up **25,000 USD**

- **Programs of Scale Grants**

- The Rotary Foundation Awards one **\$2 million** Programs of Scale Grant each year
- Long term project that can be scaled up and results in lasting change

- **District Grants**

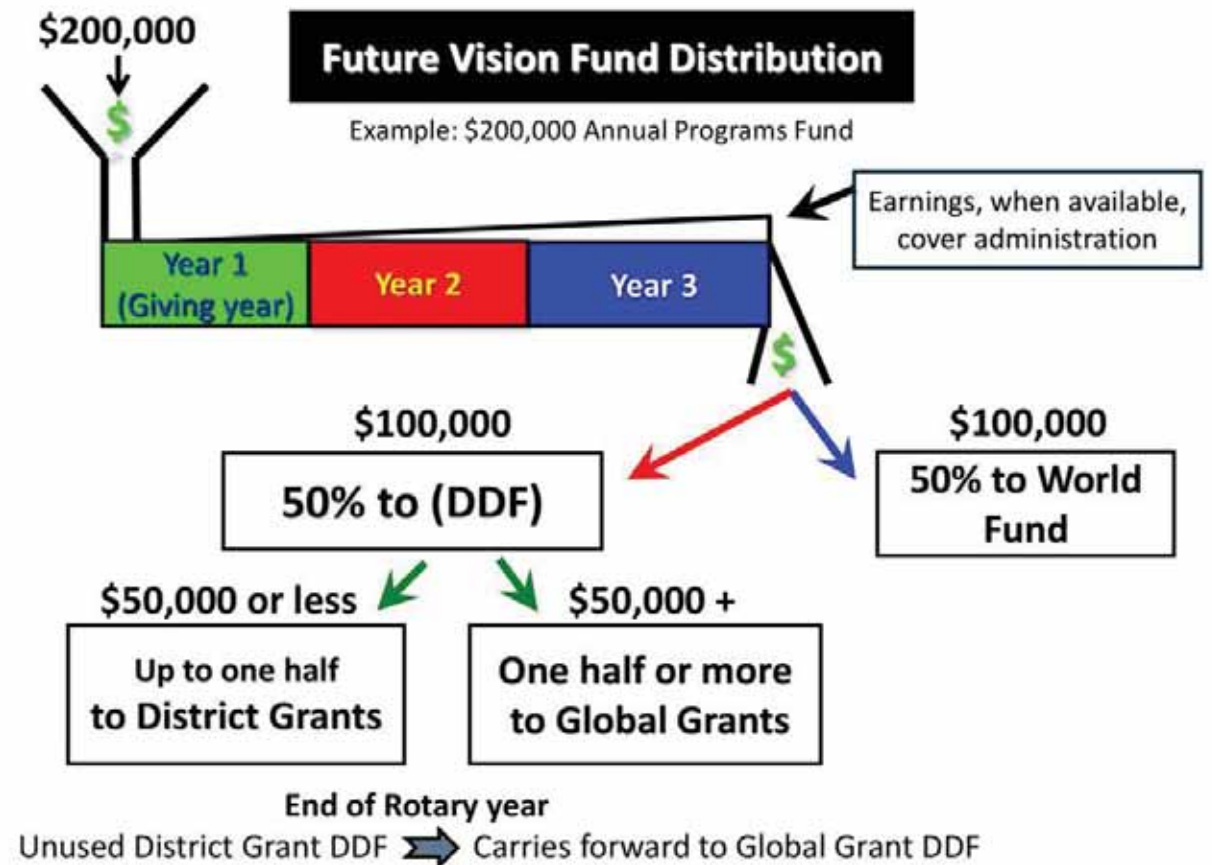
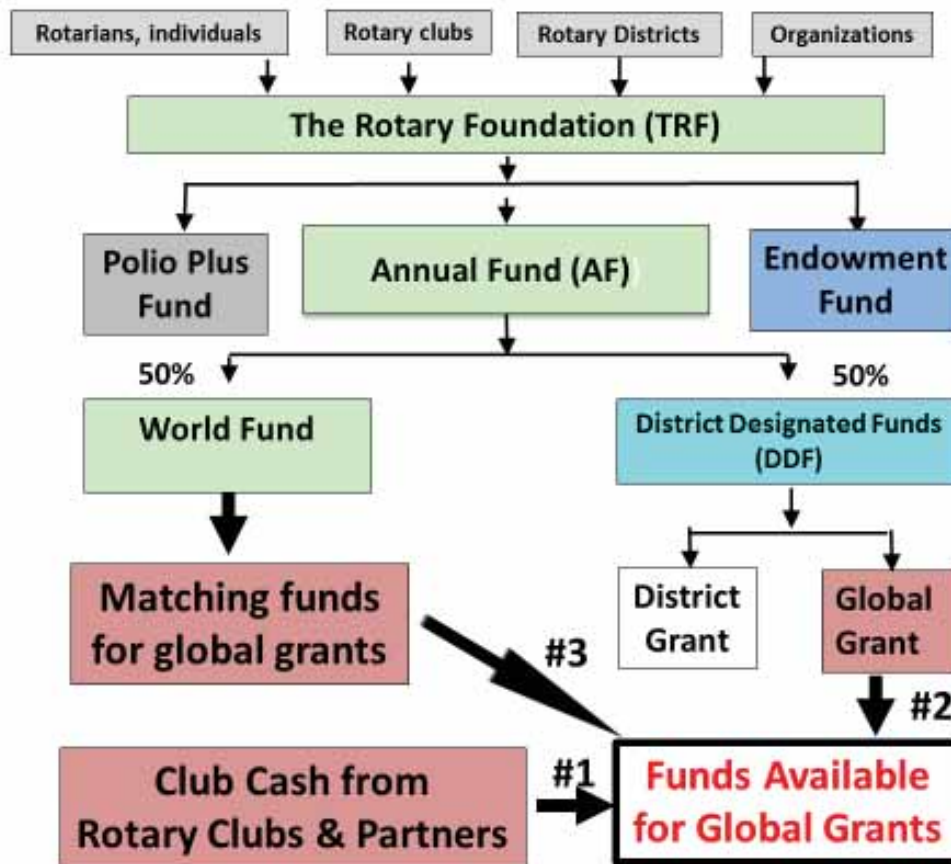
- **Small Scale projects** supported by the DDF

1.2 Foundation Grants – GG

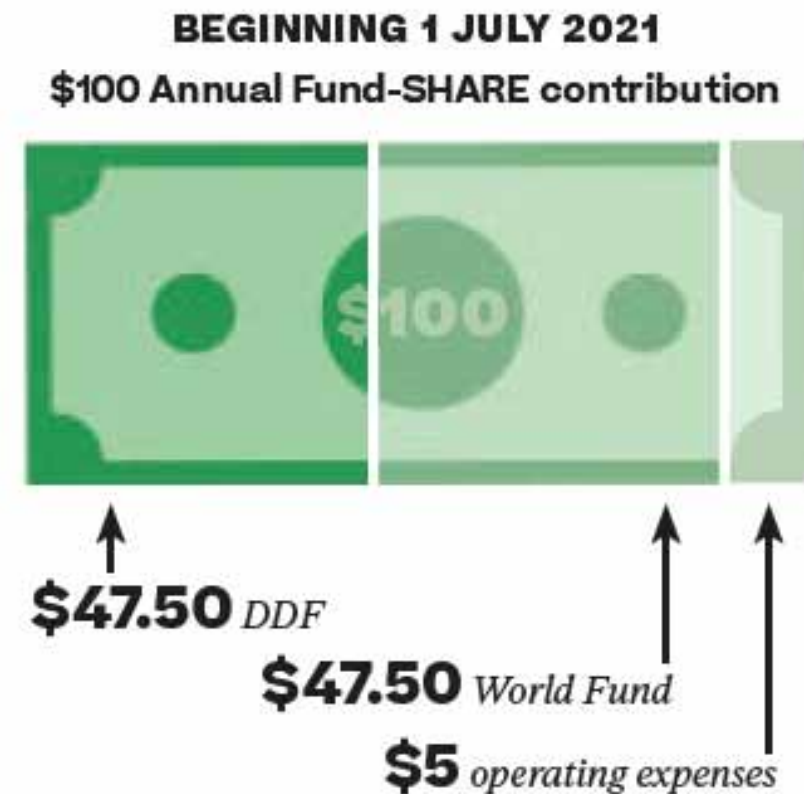
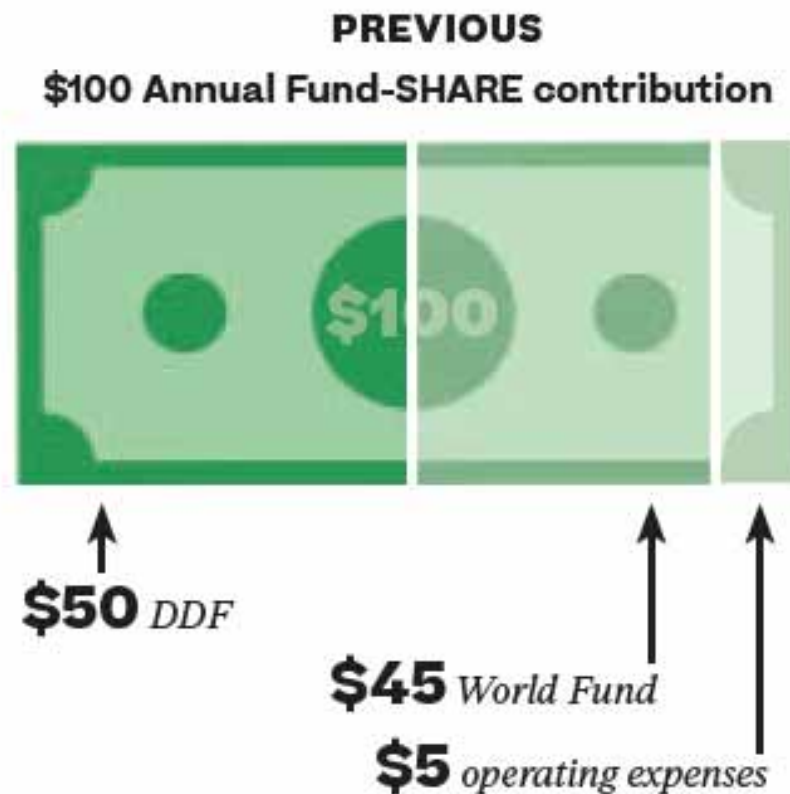
- **Global Grants**

- **Strategically focused** high impact large scale projects that are **measurable and sustainable – Training a plus.**
- Cover three areas:
 - **Humanitarian Projects**
 - **Graduate and Postgraduate Scholarships** (application deadline 30 June for fall semester)
 - **Vocational Training Teams**
- Global Grants must adhere to the **Seven Areas of focus**
- Minimum budget of **30,000 USD**
- Maximum **World Fund Match is 400,000 USD @ 80%** of DDF Contribution (500,000 USD)
- Club/Cash Contributions can be included but are not matched by the World Fund
- **Requires International Sponsor** pairing with Host Sponsor
- **Leverage** 530 Districts, 36,000 Clubs, 1.2 Million Members
- **Credibility** for Sponsors due to TRF tracking and auditing

1.3 Foundation Funding Flow



1.3 Annual Fund-Share Breakdown



1.4 DDF Rollover Changes

- New regulation effective from 1 July 2021
 - Rollover of unused DDF limited to 5 years
 - 48.8 Million USD rolled over on 1 July 2020 to new RY
 - From 1 July 2026 DDF held for more than 5 years must be redirected by District to one of the following:
 - World Fund, Polio Plus Fund, Disaster Response Fund, RPCs, Endowment Fund...

1.5 Areas of Focus

- Peace building and conflict prevention
 - Disease prevention and treatment
 - Water, sanitation, and hygiene
 - Maternal and child health
 - Basic education and literacy
 - Community economic development
- Plus the most recent
- The Environment



2. Global Grant (GG) Project & Process

1. Community Needs Assessment and Beneficiaries
 2. Requirements, Budgeting and Suppliers
 3. International Sponsor, Fundraising, ZOOM & Focus
 4. GG Application (Minimum 3 members per sponsor)
 1. My Rotary
 2. Stages of GG Application
 5. Unique Bank sub-account once GG Approved
 6. Progress/Final Reports and Handover
- Community Assessment Form
 - Cooperating Organization MOU Form
 - Office of Foreign Assets Control (OFAC) Form

3.1 Grant Center – Apply For A grant

Global Grant Application

All fields are required unless noted as "optional".

Step 1: Basic Information

Enter some basic information, and then we'll give your application a number.

What's the name of your project?

100/100 characters

What type of project are you planning?

Check all that apply. This will tell us what else we need to ask you.



☐ **A humanitarian project**

Address community needs and produce sustainable, measurable outcomes

☐ **Vocational training**

Build skills within a community by supporting a team of professionals that will travel abroad to train or learn from colleagues in the community they visit

☐ **A scholarship**

Fund international graduate-level study by someone seeking a career within an area of focus

GRANT INFORMATION

GRANT NUMBER

...

GRANT STATUS

...

LAST ACTIVITY

12/11/2023

3.2 Grant Center – My Grants

Draft

Filter:

Grant Number ↕	Grant Title ↕	Date Created ↕	Last Activity ↕

Authorization Required

Filter:

Grant Number ↕	Grant Title ↕	Date Created ↕	Last Activity ↕
You have no grants in authorizations required. Refresh			

Submitted

Filter:

Grant Number ↕	Grant Title ↕	Date Created ↕	Submitted on ↕
You have no submitted grants. Refresh			

Approved

Filter:

Grant Number ↕	Grant Title ↕	Date Approved ↕	Payment Status ↕	Report Due ↕
Refresh				

4. General Info & Resources

- **My Rotary**

- Learning Center
 - Rotary Foundation Basics
 - Club Rotary Foundation Committee Basics
 - ...
- Grant Center
 - Global and District Grant Applications

- **Sources for this Presentation**

- My Rotary
- The Rotary Foundation Reference Guide
- The Rotary Foundation Committee Guide (2016-2019 Edition)
- A Guide to Global Grants
- *** <https://my.rotary.org/en/take-action/apply-grants/global-grants> ***



Q & A



Thank You!