

DISTRICT 5240  
Global Grants  
Breakout Session

# Creating Hope in the World

**The mission of The Rotary Foundation of  
Rotary International is to  
enable Rotarians to  
advance world understanding,  
goodwill, and peace through the  
improvement of health,  
the support of education, and  
the alleviation of poverty**

# The Rotary Foundation – Stewardship



4

star charity - Charity  
Navigator's highest level



92%

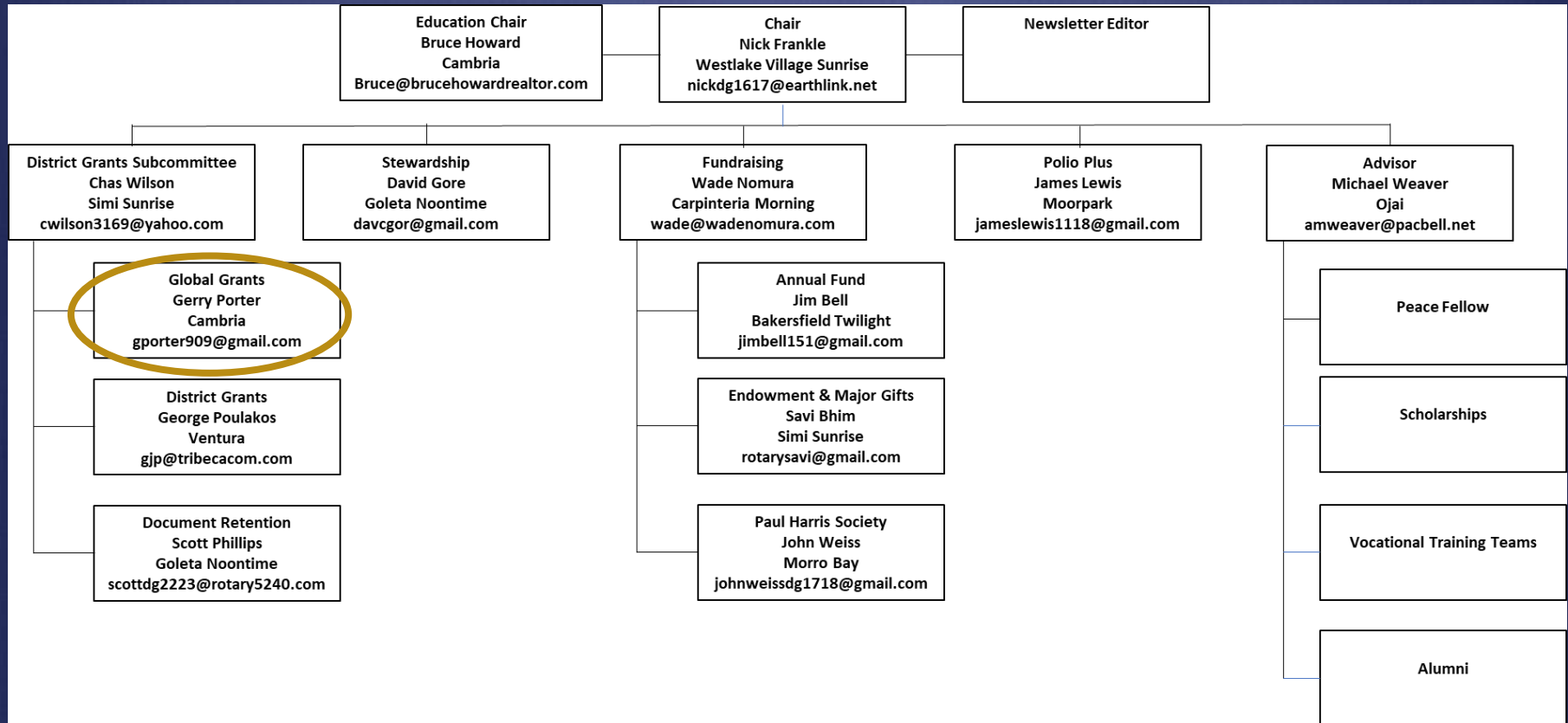
of funds are spent on  
program awards and operations

# The District Rotary Foundation Committee

**The District 5240 Rotary Foundation Committee (DRFC) is a resource supports the clubs in the district by helping them to:**

- ❁ **Understand The Rotary Foundation**
- ❁ **Create and meet goals to donate funds that change lives**
- ❁ **Apply for, implement, and measure the impact of projects funded by District Grants and Global Grants**
- ❁ **Conform to the stewardship requirements of The Rotary Foundation**

# DRFC Organization



# Global Grants

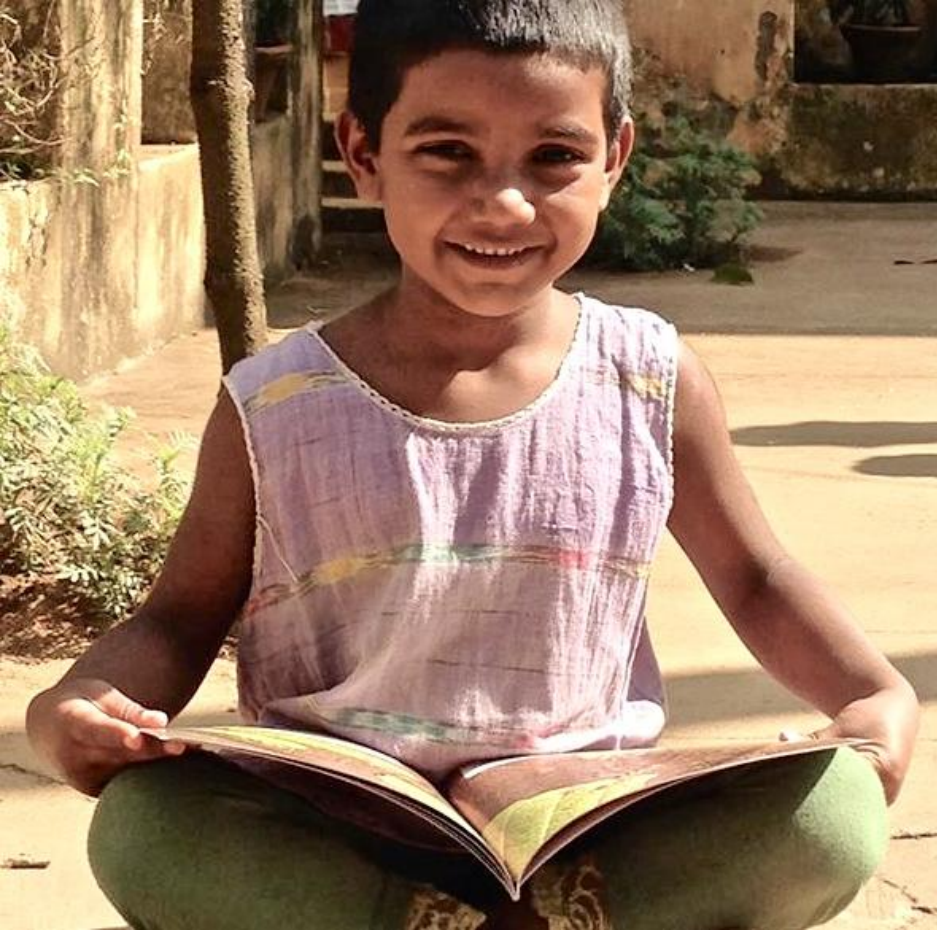
- ⦿ Global Grants are larger, sustainable, multi-year projects in area of focus and coordinated by clubs in two different countries.
- ⦿ Policies and requirements for Global Grants are set by the Rotary Foundation
- ⦿ Global Grants are funded by cash, District Designated Funds a match from The Rotary Foundation World Fund.

# Global Grants Chair

Gerry Porter

Email: [gporter909@gmail.com](mailto:gporter909@gmail.com)





# Global Grants



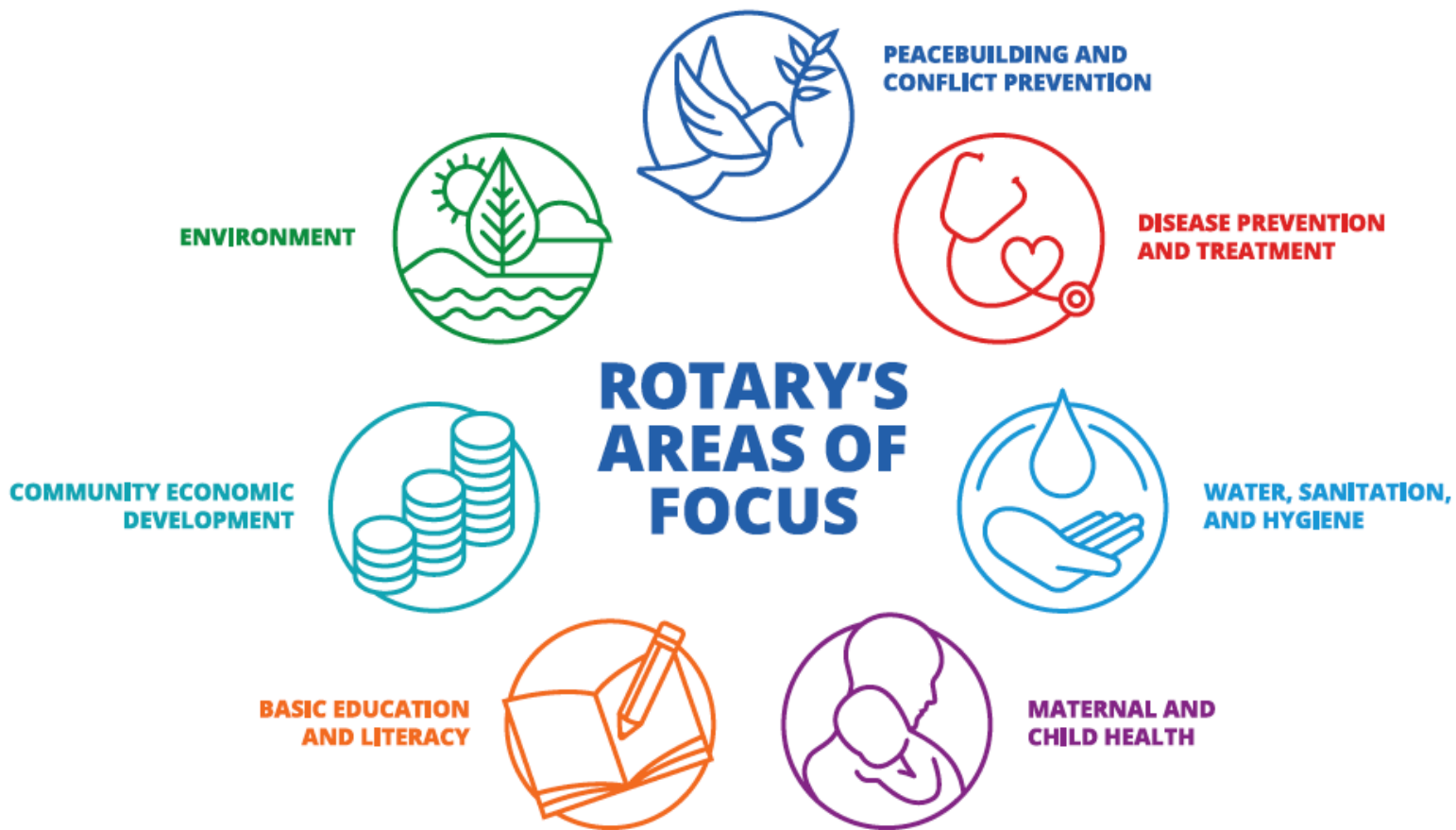


## Building Entrepreneurship in Ventura and Santa Barbara Counties



\$240,000 Rotary Foundation Grant  
Supported by eleven districts  
Spanish language business education  
\$122,000 revolving loan fund





Projects must fit into an Area of Focus



You need a reliable partner club and good communication.





Involve the community and beneficiaries in the needs assessment.



A training  
component  
increases  
sustainability





# Measurable Outcomes

- ❁ Number of benefitting school-age children
- ❁ Number of teachers who complete English language teaching program
- ❁ Number of students attending hygiene classes/ form sanitary teams



# Plan Your Project – Implementation Plan

- List the activities required to complete your project
- Include beneficiary community, Rotarians, cooperating organizations, vendors

Task #	Description	Starts	Ends	Task Lead	Resources	Dependencies

# Rotary Grants in District 5240

- ⦿ Microfinance Education and Funds for Low Income Entrepreneurs
- ⦿ Free Dental Clinic For Underprivileged Residents
- ⦿ COVID-19 Free Clinics and Hospice Care in Conejo Valley
- ⦿ Mentoring Youth Aging Out of the Foster Care System

**District 5240 can be the host club for a TRF Global Grant**





# EXPECT THE UNEXPECTED!

Category 5 Hurricane during construction



## Global Grants – Funding Example

Clubs in District 5240 Cash Contribution	-- \$20,000
District 5240 DDF Match (100% of Cash)	-- \$20,000
World Fund Match (80% of DDF)	-- <u>\$16,000</u>
Global Grant Funding	-- \$56,000
Cash Required (with 5% surcharge)	-- \$21,000

- Non-sponsoring clubs supporting a global grant must complete a cash contribution form signed by the club president that will accompany the grant application



# The lifecycle of a Rotary grant



## Draft

Rotary members plan a project or scholarship and build their grant application online

## Authorization

Club and district leaders review the application and authorize funding

## Submitted

The grant's planners submit the application to The Rotary Foundation

## Approved

If the grant is approved, the Foundation issues payment

## Completion

Members carry out the project, reporting to the Foundation annually until the work or studies are finished and the grant is closed

Lots of collaboration with grant partner

Collect & send club contributions to TRF

Collaborate on Reports, site visits











CREATE HOPE  
in the WORLD







# Your Global Grant Will Change Lives



10-21-2023

# Resources

## ⦿ District Global Grants Committee

- ⦿ Committee Chair Gerry Porter email: [gporter909@gmail.com](mailto:gporter909@gmail.com)
- ⦿ Arun Sharma email: [aks1231@sbcglobal.net](mailto:aks1231@sbcglobal.net)
- ⦿ Jon Sampson email: [jon.sampson@wellsfargo.net](mailto:jon.sampson@wellsfargo.net)
- ⦿ Vicki Arndt email: [vaeardt@gmail.com](mailto:vaeardt@gmail.com)

- ⦿ Non-governmental organizations local to the project site
- ⦿ Rotary Action Groups
- ⦿ Cadre of Technical Advisors
- ⦿ TRF Grants Coordinator
- ⦿ Rotary Foundation Grants Center
- ⦿ Rotary Learning Center

# District Charitable Foundation Travel Grants

- ⦿ Subsize the travel costs of Rotarians from Rotary clubs in District 5240 traveling to develop and/or support international humanitarian projects.
- ⦿ Up to \$750 for one traveler or up to \$1500 for two or three travelers
- ⦿ Must be matched by cash
- ⦿ Guidelines and applications are available on the District 5240 website

# What You Should Do Now

## 2023-2024 Global Grants

- 🎬 Notify the Global Grants committee if you are planning to submit a Global Grant in 2023-24
- 🎬 Comply with the District 5240 Global Grant Policies available on the district website
- 🎬 Request assistance as needed from the Global Grants committee during the preparation of the grant application



# What You Should Do Now

## 2024-2025 District Grants

- Ensure that your club is qualified
  - The club president-elect and one other knowledgeable member of the club must attend a grant management seminar
  - The current club president and president-elect must sign the TRF MOU
  - If you club is incorporated, approve a board resolution to adopt the TRF MOU and have it signed by the club president and club treasurer
  - Submit the signed MOU and club resolution to the district stewardship chair ([davcgor@gmail.com](mailto:davcgor@gmail.com))



# What You Should Do Now

## 2024-2025 Global Grants

- 🎬 If you are going to be the club lead on a global grant, attend a grant management seminar
- 🎬 Plan to attend Global Grant training at the District 5240 Training Assembly
- 🎬 Meet with members of the Global Grants committee to discuss your proposed project

# Global Grants Chair

Gerry Porter

Email: [gporter909@gmail.com](mailto:gporter909@gmail.com)