

District 1220 Foundation Group Foundation Grants Information Pack 2017-18 Rotary year

AN INTRODUCTION TO ROTARY FOUNDATION GRANTS IN DISTRICT 1220:

District Grant or Global grant – what is the difference?

In both cases the type of activity supported has to be within one of the Rotary Foundation's areas of focus.

The current areas of focus are: -

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and Sanitation
- Maternal and child health
- Basic Education and Literacy
- Economic and Community Development

The major difference between District and Global grants is one of scale.

District Grants are limited to a maximum of £1000 per application and the amount applied for has to be matched by the applicant club. It is often the case that these relatively small grants help to enable projects that attract multiple donor support and equally they are used to help to fund small club projects.

Global Grants can help to fund projects up to US \$200,000 and there is a minimum project size of US \$40,000. The entry level in general terms is £12,300 raised from a club/s which with the help of District and The Rotary Foundation would support a £30,770 (\$40,000) project.

How are grants paid for?

At the start of the Rotary year 2014/15 the current Rotarians of District 1220 had donated \$125,686 to the Annual Giving fund of The Rotary Foundation (**TRF**) during the previous twelve months. This \$125,686 has been invested for three years and the income has been used to meet the operating costs of The Rotary Foundation during this period. At the start of Rotary year 2017/18 all the original donation of \$125,686 has been transferred to The Permanent Fund of The Rotary Foundation. The Permanent Fund has retained half of the \$125,686, - \$62,843 which it uses to support Global Grants and other Permanent Fund causes. The other half of the original donation (\$62,843) is returned to The District and referred to as the District Designated Fund (**DDF**). Allocation of the DDF is at the discretion of the District and subject to the following Rotary Foundation conditions.

1. A maximum of half of the DDF may be used to fund District Grants. This is known as the "Block Grant".
2. The remainder is used to fund Global Grants, Global Scholars, Peace and Polio.

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How Do District Grants work?

At the end of July/early August every year we make an application to TRF for all the District Grants we want to fund in the year and all the grants have to commence in that year.

There is some administration involved in making the application and consequently we need the single page District and Global Grant Proposal form (Appendix 3) completed and returned by the end of July with a signed Club/District Memorandum of Understanding (Appendix 4).

It's never too early to start planning for next year's projects and ideally projects that you want to submit for a grant should be identified at your April/May club Assembly. If this has not happened please make sure that your club agree any potential project applications as a matter of urgency so that you can meet the end July deadline. If you miss this deadline you will be entirely dependent upon accessing our contingency and funds allocated to other applications that do not proceed – it is possible that there would be no funds in either of these pots and we would not be able to support you.

The Grants sub-committee evaluate all District Grant proposals received and recommend the level of support we can provide per application we support. We start from the basis of providing up to £1000 per application which must be matched by the applicant club. Ultimately our proposals require the endorsement of The District Foundation Committee and AG's are also invited to attend the approval meeting and have a vote. Obviously if we get more applications than we can approve, we have to either prioritise proposals on the basis of merit or reduce our level of support to all applications or juggle a mixture of the two approaches. The final approved list of grant applications is referred to as the Block Grant Application. Our aim is to be equitable to all concerned.

If you want to make an application for a District grant you should: -

1. Check for eligibility by reading the District 1220 Grants Criteria.
2. Discuss your proposal with the Chair of the Grants Management sub -committee. Rotarian Neil Swanwick (Chesterfield Scarsdale) neilswanwick@yahoo.co.uk (Tel: 01246 569642)
3. Complete the Grant Proposal form (Appendix 3) and return it. This is a brief description of your project and is used by the Foundation Team to determine if the project should form part of their Block Grant application that is made end July/early August every year. At this stage, you should also complete the District 1220 Memorandum of Understanding (MOU) (Appendix 4) which requires the signatures of the President and President elect of your club. The Block Grant Application that is eventually made is published on the District Website and at the September District Council.
4. If advised that your project has gone forward as part of the block application **and** subsequently that it was accepted as suitable for application, you should complete the District 1220 District Grant Application form (Appendix 5). This provides a more detailed description of your project. Following approval of your application by the District Foundation Committee funding will become available. ***Please note that projects must not commence before approval as this would render the Application invalid.***
5. The project must then commence in the Rotary year of application and complete by the end of the following year.
6. Finally, but very important, we'll require project reports by the end of the next Rotary year.

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The application guidelines and documentation are all available on the District website and as appendices to this document.

How do Global Grants work?

For Global Grants a Club or group of Clubs have to raise a minimum of about £12,300, which with DDF and TRF support would yield a project budget of £30,770. This is possible because your District will try to match half of what you have raised (£6150) and TRF will match whatever the District contributes (£6150) plus half of what you have raised (£6150). All figures are rounded and based on the June 2017 exchange rate of £1 = \$1.30

Applications for Global Grants can be made at any time but clubs are encouraged to identify them to the same time scale as District Grants. This enables the District team to budget their financial support for these projects. If applications are made later in the year we may have to postpone them to the following year if funds are not available.

The Global Grant application is an online process and the District team will help you through this but the first steps are very similar to the District Grant process: -

1. Check for eligibility by reading the District 1220 Grants Criteria (Appendix 2)
2. Discuss your proposal with the Chair of the District Foundation team. Rotarian John Cavey – john@kvcs.co.uk (Tel: 01283 713535)
3. Complete the District and Global Grant Proposal form (Appendix 3) and return. This is a brief description of your project and is used by the Foundation Team to determine if the project is suitable.

Managing our Grants is a juggling act so please contact us at the earliest opportunity.

The documentation given in the Guidelines may appear rather daunting, but once you embark on an application you'll find the process fairly straightforward.

Remember we're here to help!

Grants Sub-committee CONTACTS:

Neil Swanwick (Chesterfield Scarsdale) Chair

John Moffat (Burton)

David Crowson (Derby)

Appendices:

1. District Designated Fund Policy (DDF)
2. Foundation Grants criteria
3. District and Global Grant Proposal Form
4. Club/District Memorandum of Understanding
5. District Grant Application Form
6. District Grant Report Form