

Grant Management Manual



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Read Rotary Foundation Grant Terms and Conditions available at www.rotary.org.

** Note that all appendixes may not be immediately available. Please check back in the zip file or read Rotary Grants News to learn when documents have been updated.*

As Rotarians, we contribute our skills, expertise, and financial support to help our communities meet critical needs: clean water, economic security, health and protection against deadly diseases, education, and peace and safety. Global grants support these efforts. This manual explains how to plan a sustainable and measurable project, apply for a global grant to support it, and manage the grant funds responsibly. It also includes resources to help your club implement the club memorandum of understanding (MOU). This manual is intended primarily for club representatives attending the district-led grant management seminar, but can also be used by districts applying for a global grant.

This is the 2012 edition of the *Grant Management Manual*. It contains information based on the club memorandum of understanding, the Terms and Conditions for Rotary Foundation District Grants and Global Grants, and The Rotary Foundation Code of Policies. Please refer to those resources for exact guidelines. Changes to these documents by the Foundation Trustees override policy as stated in this publication.

Questions?

For questions about...

Grant management, qualification

District grants, global grants

This manual, training

Email...

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Rotary Foundation Grants Overview

The Rotary Foundation offers Rotarians three grant types: district, global, and packaged. Although this manual focuses on global grants, all types are briefly explained here.

District Grants

District grants fund short-term projects and activities, either local or international, that support the Foundation's mission. Clubs submit their funding requests to the district, which administers and distributes the funds.

Each district sets its own procedures and policies for how and when clubs submit requests, as well as any additional requirements. Contact your district Rotary Foundation committee for details on this process.

Go to [learn.rotary.org](https://www.learn.rotary.org), and view the course titled Introduction to Future Vision for help evaluating projects and determining the appropriate grant.

Global Grants

Global grants fund large-scale projects and activities that

- Align with an area of focus
- Respond to a need the benefiting community has identified
- Include the active participation of the benefiting community
- Are designed to enable the community to help itself after the Rotary club or district has concluded its work
- Have measurable results

AREAS OF FOCUS

Projects that receive Global Grant funds from The Rotary Foundation should fall under at least one of the following:



Peace and conflict prevention/resolution



Disease prevention and treatment



Water and sanitation



Maternal and child health



Basic education and literacy



Economic and community development

Activities funded by global grants include:

Humanitarian projects address community needs by providing sustainable, measurable outcomes in the benefiting community.

Vocational training builds skills within a community by offering local training or by supporting groups of professionals traveling abroad for rigorous study on their profession or to teach local professionals about a particular field. This type of training may be most effective in conjunction with a humanitarian project.

Scholarships fund study by graduate students whose career goals support an area of focus.

Packaged Grants

Packaged grants provide opportunities for Rotary clubs to work with The Rotary Foundation's strategic partners on predesigned activities. Each project is fully funded by the World Fund and the strategic partner.

In the electronic version of this manual, orange text indicates hyperlinks to resources on [learn.rotary.org](https://www.learn.rotary.org).

Differences Between District and Global Grants

In general, projects funded by global grants are larger and give clubs and districts more responsibility for managing the grant funds, reporting on how they are used, and monitoring and evaluating project outcomes.

District Grant	Global Grant
Supports the mission of The Rotary Foundation	Supports an area of focus
No minimum budget	Minimum budget of US\$30,000
Short-term impact	Long-term, sustainable impact
Can support scholars pursuing any level of study, locally or internationally	Can support scholars pursuing graduate-level study internationally
Active Rotarian involvement	Active Rotarian involvement
Adheres to the grant terms and conditions	Adheres to the grant terms and conditions
	Measurable outcomes

Club Qualification

Qualification assures The Rotary Foundation that your club has the proper financial and stewardship controls in place to successfully manage grant funds. Grant management encompasses everything from selecting projects and activities to applying for a grant to ensuring proper stewardship of funds to evaluating and reporting grant outcomes.

Clubs must be qualified by their district each Rotary year in order to apply for global or packaged grants. Districts decide whether their clubs must be qualified in order to receive district grant funds. To complete the qualification process, a club must

1. Have the president-elect or a designated club representative attend a grant management seminar
2. Read and agree to the club memorandum of understanding and submit a copy signed by the club president and president-elect to the district.
3. Agree to any additional district qualification guidelines.

To maintain qualified status, a club must abide by the terms of the club MOU (appendix B), and the grant terms and conditions. The MOU is an agreement between a club and its district explaining the minimum Foundation requirements for managing grants. Your club's policies and local laws may exceed these requirements.

Questions? Contact your district Rotary Foundation committee.

Consider having more than one club member attend the grant management seminar.