

Future Vision in D5360

2010/11 Planning Year for
2011/12 Implementation Year



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Overview

- District structure under future vision
- Types of grants available and timelines
- Club and district responsibilities
- Club qualification
- Q & A session / **coffee break**
- Applying for:
 - District project grants
 - District scholarship grants
 - Global grants

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SUMMARY: TODAY'S SESSION IS ABOUT ACCESSING AND HANDLING GRANT FUNDS FROM TRF

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District Responsibilities under FV

- District signed MOU accepting responsibility for handling district grant funds
- TRF has the right to audit use of funds
 - If problems, 5360 may be asked to return funds
- District board delegated responsibility to District Grants Committee (DGC)
- DGC allocates funds between District and Global grants

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Overview of 5360 Structure, 2011/12

District 5360 Board
Mike French DG and Chair

District Rotary Foundation Committee
Rick Grass Chair

District Grants Committee
*Walter Haessel Chair
Bob Wiens Vice Chair*

Various Subcommittees
(Defined Later)

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TRF Funds Available to Clubs

District 5360 Board
Mike French DG and Chair

District Rotary Foundation Committee
Rick Grass Chair

District Grants Committee
*Walter Haessel Chair
Bob Wiens Vice Chair*

District Grants

Global Grants

- Rules for District and Global grants are very different

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Overview of District Grants Rules

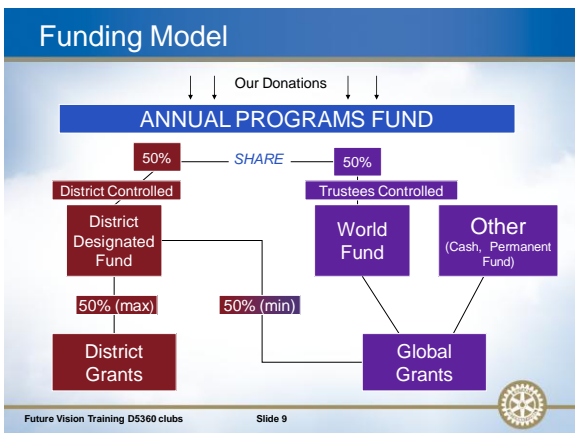
- Clubs apply to DGC for funds
- District applies for **one** "block grant" per year
- On approval, TRF sends one check to district
- Clubs sign an agreement with DGC & get funds
- Club must report to DGC and obey rules
 - Terms and conditions set by TRF
 - Rules set by district
- Club must refund cash to TRF if break rules
- DGC audits clubs and TRF may audit district

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Overview of Global Grants Rules

- Global DDF is virtual money
- Clubs apply to DGC for DDF
- Apply to TRF for Global Grant to access DDF
- Global grants involve matching from TRF
- Make online application to TRF
- Must report to TRF online
- TRF assumes all monitoring responsibility once district approves global DDF
- District must approve online application

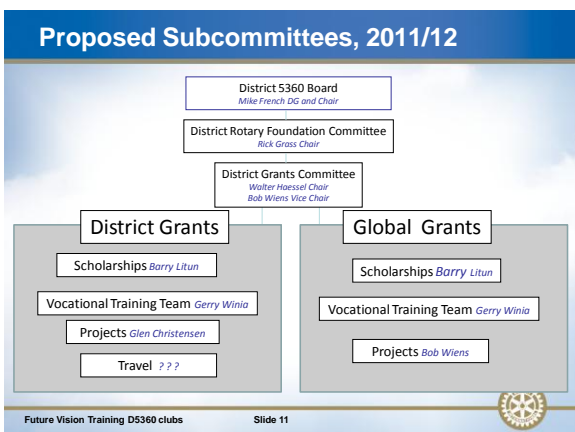
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Proposed SHARE Allocation, 2011/12

Club & personal donations to TRF Annual Program Fund in 2008/09 \$199,548			
	District Grant	Global Grant	
District SHARE Allocation 2011/2012	\$ 99,774	50%	50%
DDF target split in dollars	\$ 49,887	\$ 49,887	
Carryover from 2010-2011 (Dec 20,2010)			\$ 30,000
totals available	\$ 49,887	\$ 79,887	
Admin fee	\$ 1,497		
Disaster Relief Grants	\$ 2,000		
Project Planning Travel Grants	\$ 5,000		
Project Grants	\$ 26,390	\$ 79,887	
Vocational Training Team			
Scholarship grants	\$ 15,000		
Other possibilities*		\$ -	
Balance remaining	\$ -	\$ -	
*Other Global Grant Possibilities	Peace & Reconciliation scholarships Donations to other Districts Donations to Polio Plus, etc.		

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Global Grants

- Global grant funds allocated among clubs/projects
- If awarded global funds by the district:
 - Clubs apply online to TRF for matching grants
 - Report to TRF online
- More detail on this later

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District Grants—DGC Role

- Allocate funds between district and global grants (max 50% to district)
- Criteria to allocate funds among projects & clubs
- Determine reporting procedures for grants
- Review Club's written and financial reports
- DGC delegates financial responsibility to clubs
- If report or project is deemed unacceptable and a suitable resolution cannot be found
 - The club must return the funds to TRF

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Club Responsibilities under FV

- Must qualify if want to access funds
- Use grant funds consistent with the TRF Terms and Conditions
- Report on the use of funds
 - Global grants report to TRF
 - District grants report to DGC
 - Keep detailed financial records
 - Provide receipts for any expenditure over \$75
 - Return funds not used appropriately

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RI Time Lines for District Grants

Bergsma	Bergsma			
	French	French		
		Leggett	Leggett	
			Killoran	Killoran
				FV World
2009/10	2010/11	2011/12	2012/13	2013/14
	Planning year			
	Implementation year			

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RI Time Lines for District Grants

Bergsma	Bergsma			
	French	French		
		Leggett	Leggett	
			Killoran	Killoran
	Today			FV World
2009/10	2010/11	2011/12	2012/13	2013/14
	Planning year			
	Implementation year			

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District Grants Timing Continued

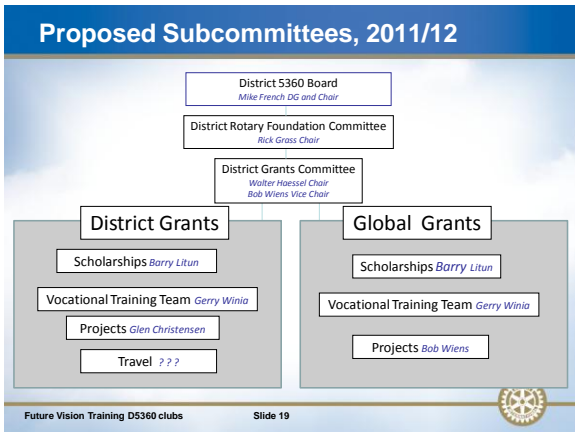
- Finished Bergsma Planning Year Jan 2011
 - Implementation year started July 1, 2010
 - 24 months to complete projects (Jan 2013)
- Goal: Complete French planning June 30 2011
 - Distribute funds July 2011
 - Complete projects July 2013
- Leggett planning year July 1, 2011
 - Some planning underway now
 - Training will commence Oct 2011 with Make Dreams Real conference

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Planning year deadlines to June 30

- Apply for district grants—before May 15
 - Clubs must qualify first
 - Clubs must allocate matching funds for 2011/12
- Club qualification
 - One club member must complete training
 - President and PE sign MOU
 - Clubs must qualify to access grants
- DGC apply to TRF for district grant on May 30
- Distribute funds to clubs in July

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- ### Planning Cycle for Vocational Training
- Vocational Training Teams replace GSE
 - Probably one way only
 - Must have an area of focus (subject matter)
 - Rotarian leader should have expertise
 - For VTT, must know
 - Location (e.g., university, technical schools, etc)
 - Who will be trained
 - Planning cycle is over 12 months
 - Call for proposals 2012/13 likely in near future
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- ### Global Scholarship Planning Cycle
- Replace ambassadorial scholarships
 - Long application and review process
 - Students must be accepted by a university in a pilot district and in a program acceptable to TRF
 - Students can apply online when the district allocates DDF for a global scholarship
 - No funds for the 2011/12 Rotary year (study 2012/13)
 - May allocate funds for 2012/13 (study 2013/14)
 - Contact Barry Litun for more information
Barry.Litun@lethsd.ab.ca
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- ### Bias in favour of large clubs?
- Incentives for larger projects under FV
 - Minimum global project is \$30,000 US
 - Encourage clubs to collaborate on larger projects
 - 5360 allocated DDF to 12 clubs for global grants
 - 4 of 11 less than 40 members
 - 7 of 11 less than 60 members—63% of funds
 - Awarded 31 district project and scholarship grants
 - 19 of 31 to clubs with less than 40 members
 - Received 52% of the funds
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