GRANT MODEL EVALUATION SUMMARY

BACKGROUND

- The Trustees conducted an evaluation of the grant model during the 2015-16 Rotary year to better understand how Rotary clubs and districts have adopted the new model and to find out if adjustments or modifications need to be made. We also wanted to learn more about the impact the Foundation’s grants are having in the areas of focus as we prepare for the end of polio.

- The evaluation was carried out by the TRF Programs Committee with input from an Oversight Committee of RI Past Presidents.

- This is the largest and most comprehensive evaluation of the grants program the Foundation has ever undertaken. It included assistance from 30 staff across the Secretariat, 63 members of the Cadre of Technical Advisers, and support from two consultants: Hanover Research, a global information services firm; and GfK, the world’s fifth-largest market research and consumer information firm.

- The evaluation included survey responses from nearly 6,000 Rotarians in 154 countries. Through globally held focus groups, 169 Rotarians with a range of involvement in Rotary grants were interviewed. They shared their personal experiences and perspectives on all aspects of the grant model.

- The evaluation:
  - Studied Rotarian and beneficiary satisfaction with the grant model
  - Assessed Rotarians’ training needs
  - Reviewed grant processing cycle times and other critical success factors
  - Researched specific programmatic issues with district and global grants, including scholarships and VTTs
  - Studied the impact and sustainability of global grant projects in the areas of focus

- The findings of the grant model evaluation were shared with the Trustees at their April 2016 meeting. Further data from the report will be shared with Rotarians at the Korea Convention in May and through communications and publications available early in the 2016-17 Rotary year.

KEY FINDINGS

- Overall, data from the evaluation suggests that there are high levels of satisfaction with the new grant model. 90% of survey respondents said they support the grant model, and 86% see it as an improvement over the former grant model.
• Both grant activity and the average grant award continue to increase each year. Grant awards increased 24% between 2013-14 and 2014-15. Similarly, the Foundation has continued to see increased giving to the Annual Fund since 2013.

• GfK and the Cadre of Technical Advisers conducted a study of the sustainability of our global grant projects. This is the second time since the Future Vision pilot that the Foundation has assessed grant projects for sustainability. The study found a marked improvement in sustainability scores since the pilot period, along with support among Rotarians for making grant projects more sustainable.

• Adoption of the new grant model is consistent with our experience during the Future Vision pilot; as clubs and districts learn more about how the grant process works, they become more engaged. We are also seeing increases in the numbers of clubs collaborating per global grant.

**ACTIONS TAKEN**

• Despite the indicators of satisfaction and impact, Rotarians voiced frustration with specific aspects of the grant process, which need to be addressed. Therefore, the Trustees took a number of decisions to address these concerns.

• Rotarians have asked for more resources to help them better understand how to design sustainable projects that align with the areas of focus and to help them apply for Rotary grants. Staff has developed many resources to address these needs, and is looking to determine more effective ways to make sure they get into the hands of grant applicants. We also anticipate that many DRFCs and DGSCs trained as part of the new grant model launch will leave office this year. For that reason we are working to ensure that incoming DRFCs and DGSCs will already have the tools they need to start their important jobs on 1 July.

• We consistently found two areas of focus where the policy statements and eligibility requirements were unclear to Rotarians. The Programs Committee reviewed the policies related to Basic Education and Literacy and Economic and Community Development. They gathered input from staff and Rotarians active in these areas to determine the best approach for providing clarification. The Trustees approved some modifications to these statements and the training materials, which will be communicated to Rotarians.

• We also discovered that, while 81% of Rotarians were satisfied with the online grant application tool, 19% were dissatisfied with some aspects of the tool. The Programs Committee and staff interviewed Rotarians from around the world to learn more about the “bottlenecks” in the system. This information was shared with the Rotary Grants team to incorporate in plans for modifying the user interface for the system. Many of the concerns raised in the research are being addressed as part of planned upgrades to the system for the next Rotary year.

**NEXT STEPS**

• The Trustees continue to process information collected from the evaluation. In some cases, more data may need to be collected before the Trustees can take further action.

• The Trustees will receive additional reports at their April 2017 meeting, specifically related to:
- Districts’ use of District Designated Funds
- Improving the way clubs and districts find partners for global grants
- Reviewing qualifications for DRFCs and DGSCs
- Helping clubs and districts scale up their projects with support from the Cadre and partners
- Evaluating the community needs assessment requirements for global grants
- Looking at other programmatic issues identified by the grant model evaluation

- The Trustees remain committed to regularly evaluating the grant model and to seeking ways to improve the process for grant applicants and beneficiaries. They will make further adjustments as needed, based on future evaluations.

- We are equally committed to ensuring that we are most effectively using funds raised by Rotarians to address community needs in ways that maximize sustainability and make the greatest possible impact within each area of focus.