GRANT MODEL EVALUATION
YEAR 4 FINDINGS (2022-23)
PUBLISHED OCTOBER 2023

Rotary

OVERALL FINDINGS

- Global grants are valuable for our members

- Participants in global grants are satisfied with the program

- Members and participants support sustainability

- Members understand grant requirements and can overcome challenges

The questions guiding our grant model evaluation connect directly to our Action Plan. Click the links to review each topic in depth.

The evaluation process gives us an opportunity to address other questions as they arise.

33.090. <u>Evaluation Plan for Foundation Grants Program</u>

Evaluation and measurement are critical elements of the Foundation grants program. The Trustees have requested the general secretary to include Foundation grants program monitoring in each October and April Trustees meeting agenda through review and evaluation of performance measures.

The general secretary is responsible for creating and implementing the evaluation plan for the Foundation grants program. Evaluation will serve three main purposes: determining how well the Foundation grants program priorities and goals are achieved; determining a business model that will drive technology acquisition; and determining how TRF is performing over time to identify and implement improvements. *(October 2012 Trustees Mtg., Dec. 16)*

Source: June 2007 Trustees Mtg., Dec. 165; October 2010 Trustees Mtg., Dec. 17
           Amended by October 2012 Trustees Mtg., Dec. 16

HOW THE GRANT MODEL EVALUATION WORKS

We gather feedback from various stakeholders:
- Program participants
- District chairs
- Cadre of Technical Advisers
- Cooperating organizations
- Grants staff

Using these data collection methods:
- Databases
- Surveys
- Interviews
- Focus groups
- Site visits

To evaluate the following topics:
- Scholarships
- Monitoring and evaluation
- Sustainability
- Requirements
- Global grant participation and satisfaction
- District resources
- Learning and knowledge sharing

HOW THIS REPORT IS ORGANIZED

Increase our impact

1. To what extent do the objectives of <u>SCHOLARSHIPS</u> fit within Rotary's grant model?
2. How are Rotary members using their collected <u>MONITORING AND EVALUATION</u> data?
3. How are Rotary members planning for and implementing activities that contribute to <u>SUSTAINABILITY</u>?
4. How do sponsors perceive grant <u>REQUIREMENTS</u> that aim to increase our impact?

Enhance participant engagement

5. To what extent does the current grant model enable or hinder <u>ROTARY MEMBER PARTICIPATION</u> in grants?
6. Are members <u>SATISFIED</u> with the grant process and program?

Increase our ability to adapt

7. What is the outcome of incorporating <u>DISTRICT RESOURCES</u> into the global grant process?
8. To what extent does the global grant model allow or encourage members to <u>BUILD UPON WHAT THEY'RE LEARNING AND SHARING</u> — particularly with respect to project design, project management, and monitoring and evaluation?

The questions guiding our grant model evaluation connect directly to our Action Plan. Click the links to review each topic in depth.

The evaluation process gives us an opportunity to address other questions as they arise.

PREVIOUS GRANT MODEL EVALUATION REPORTS

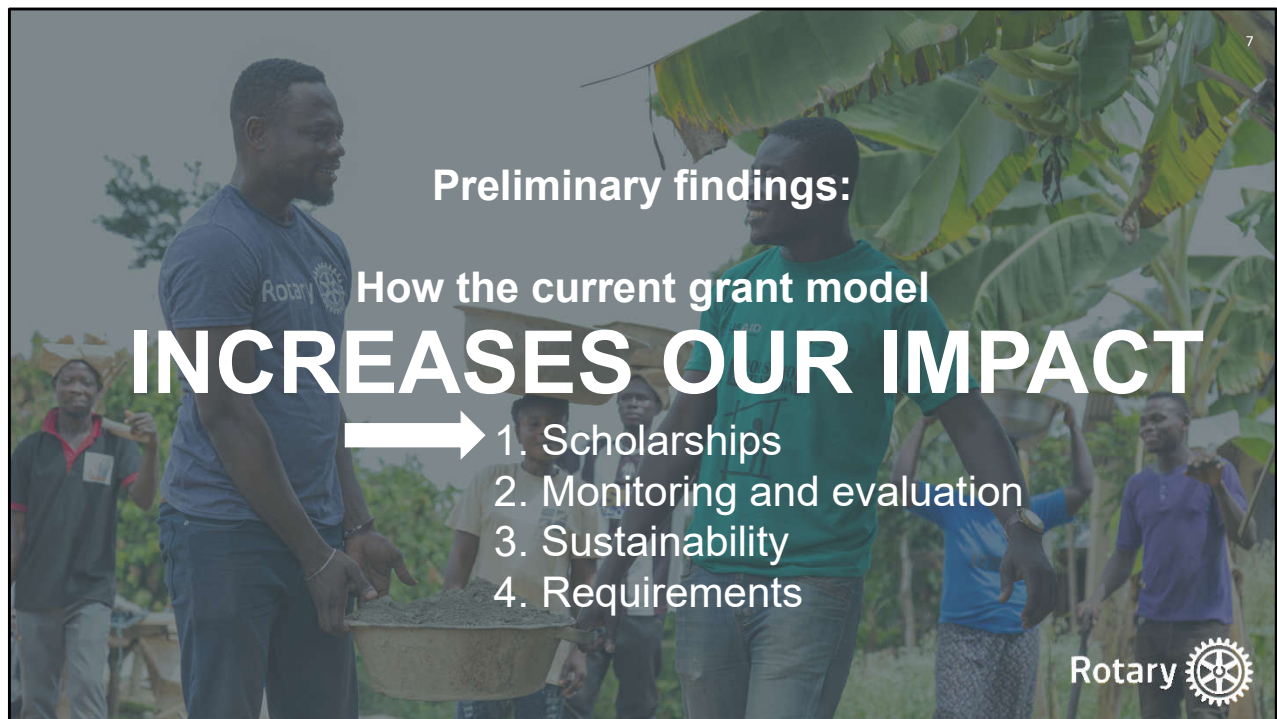Click a report to download the PDF:

Grant Model Evaluation Year 1

Grant Model Evaluation Year 2

Grant Model Evaluation Year 3

To learn more about the evaluation process and our findings, we recommend that you review the previous reports available on the Grants page of My Rotary or upon request. Contact us at ri_research@rotary.org.

Findings are shared regularly with The Rotary Foundation Board of Trustees, the Programs Committee, the Secretariat, and other stakeholders.

The insights inform Rotary's approach to global grant requirements and processes, resources and training, project design, and portfolio management.

Preliminary findings:

How the current grant model
INCREASES OUR IMPACT
→ 1. Scholarships
2. Monitoring and evaluation
3. Sustainability
4. Requirements

Rotary

We explored how the objectives of scholarships fit within our grant model:

- What are the objectives of global grant scholarships?

- Are global grant scholarships meeting their objectives?

- What does participation in global grant scholarships look like?

DATA SOURCES

Surveys

- 2021 & 2023 Global Grant Scholars Surveys
- 2021 & 2022 Global Grant Sponsors Surveys
- 2021 & 2022 District Rotary Foundation Chairs Surveys

Official Records

- Grant Productivity Report

Our insights are based on several surveys and Rotary's official records.

INSIGHTS FROM GLOBAL GRANT SCHOLARSHIP RESEARCH

1. Global grant scholarships are meeting their objectives. Rotary's scholarships program has been simplified, and scholars are working at organizations where they can make a difference in their areas of focus.

2. Scholars are more involved with Rotary during their scholarships than after. About 17% of scholars have joined a club.

3. Most scholars come from the U.S. and Japan and study in England and the U.S.

4. Districts that have not sponsored scholars report that $30,000 is too much to spend on one person, and that it can be hard to find scholars and host sponsors.

Here are the insights we've gleaned about global grant scholarships over the past few years.

OBJECTIVES

SIMPLIFY & FOCUS SCHOLARSHIPS
- Many scholarship types were in low demand under the previous model.
- Some scholarship types lacked relevance to our Foundation's mission.
- **Revised requirements for global grant scholarships and the elimination of other scholarship types simplified and focused the program.**

INCREASE IMPACT & SUSTAINABILITY
- District leaders expressed concern about "getting the proper return on investment from scholars" and said "sustainability and measurable global impact [of scholarships under the past model] are questionable."
- **Scholars report making contributions in their areas of focus and having careers in sectors that allow them to continue making contributions.**
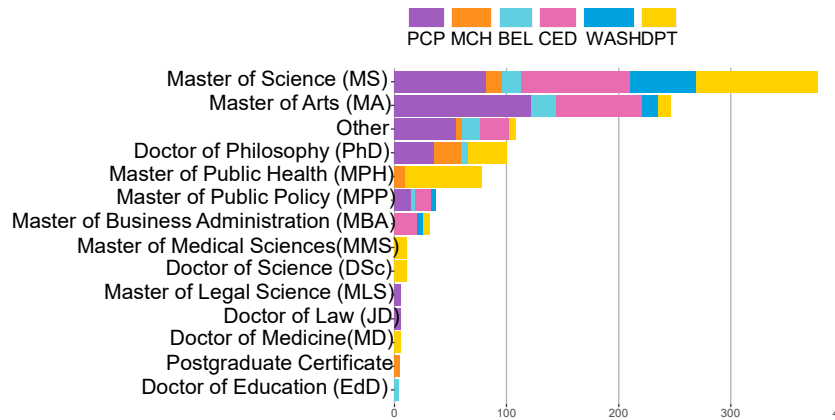
Global grant scholarships were developed with two primary objectives, according to Rotary's records: (1) focus and simplify The Rotary Foundation's scholarships program and (2) increase the impact and sustainability of the scholarships program.

By revising requirements for global grant scholarships and eliminating other scholarship types, the Foundation achieved the first objective. The evidence we've collected supports the conclusion that global grant scholars are making a sustainable impact.
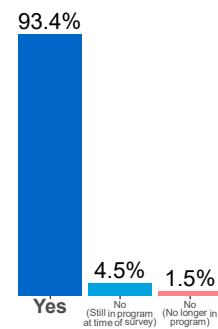
SCHOLAR EDUCATION

What degree did you use your global grant scholarship for?

PCP MCH BEL CED WASHDPT

Master of Science (MS)
Master of Arts (MA)
Other
Doctor of Philosophy (PhD)
Master of Public Health (MPH)
Master of Public Policy (MPP)
Master of Business Administration (MBA)
Master of Medical Sciences(MMS)
Doctor of Science (DSc)
Master of Legal Science (MLS)
Doctor of Law (JD)
Doctor of Medicine(MD)
Postgraduate Certificate
Doctor of Education (EdD)

0   100   200   300   400

Did you receive your degree?

93.4%

4.5%   1.5%

Yes   No (Still in program at time of survey)   No (No longer in program)

Source: 2021 & 2023 Global Grant Scholars Surveys

Many global grant scholars used their scholarships to pursue master's degrees, and the vast majority graduated.
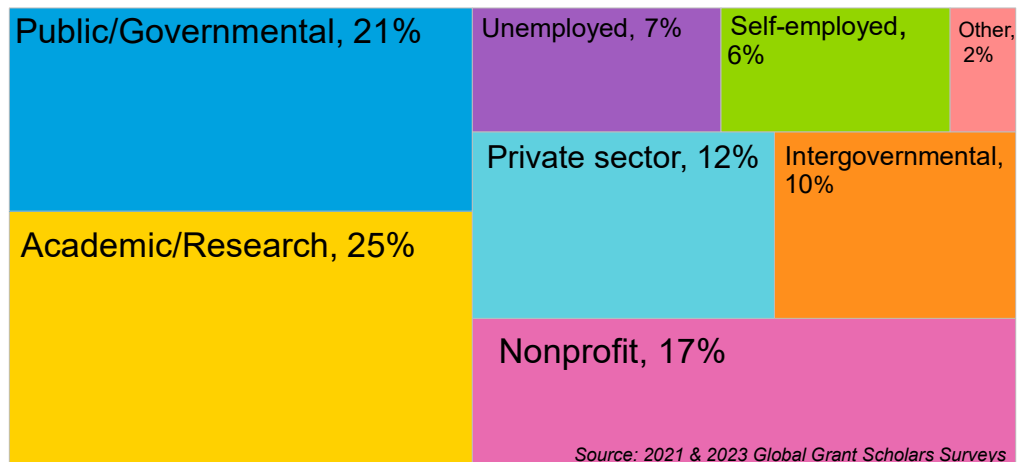
Since only scholars from Rotary Year 2013-2014 to Rotary Year 2019-2020 were surveyed, there were no scholars who studied in the Environment area of focus included in the survey panels.

SCHOLAR EMPLOYMENT

At what type of organization do you currently work?

Public/Governmental, 21%

Academic/Research, 25%

Unemployed, 7%

Self-employed, 6%

Other, 2%

Private sector, 12%

Intergovernmental, 10%

Nonprofit, 17%

Source: 2021 & 2023 Global Grant Scholars Surveys

Over half of global grant scholars work in sectors that will allow them to contribute to their areas of focus. Many are academics, while others work in the public and nonprofit sectors.
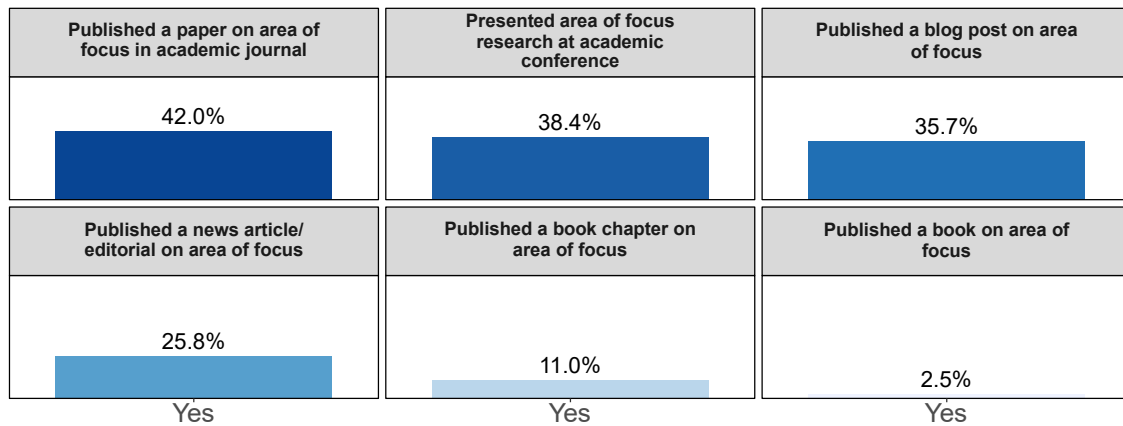
EXAMPLES OF SCHOLARS' EMPLOYERS

Here are some examples of where scholars are working:

- Action Against Hunger USA
- Asian Development Bank
- Emory University
- Iov42 (technology firm)
- Japanese Ministry of Health, Labour, and Welfare
- North Dakota Department of Health
- UNICEF

AREA OF FOCUS IMPACT

Since completing your global grant scholarship, have you done any of the following?

Published a paper on area of focus in academic journal	Presented area of focus research at academic conference	Published a blog post on area of focus
42.0%	38.4%	35.7%

Published a news article/ editorial on area of focus	Published a book chapter on area of focus	Published a book on area of focus
25.8%	11.0%	2.5%
Yes	Yes	Yes

Source: 2021 & 2023 Global Grant Scholars Surveys

Scholars are not simply working in sectors that could allow them to contribute to their areas of focus. They are actively publishing and presenting research to further our understanding of these areas.

SCHOLAR IMPACT

Have global grant scholarships helped scholars in their careers and in making a positive impact in their area of focus?

77% strongly agreed that the scholarship helped them achieve career goals

56% strongly agreed that the scholarship helped them make a positive area of focus impact

Strongly disagree | Disagree | Neither agree nor disagree | Agree | Strongly agree

Source: 2021 & 2023 Global Grant Scholars Surveys

Scholars report that the global grant scholarship had the most positive effect on their ability to achieve career goals, but over 60% agree that the scholarship also helped them make a positive impact in their area of focus.
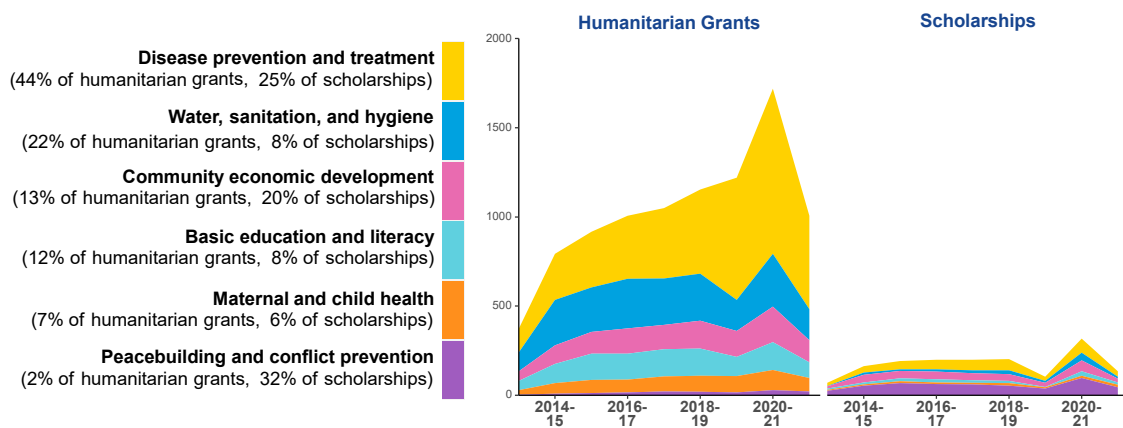
SCHOLARSHIP IMPACT

- 11% of scholars said they've joined a Rotary club since their scholarship ended; 6% have joined but terminated their membership

- 44% of scholars said they've attended a district conference; 10% have attended an international convention

- 11% reported being members of a Rotary alumni association

- 66% of international sponsors agreed with the statement "My understanding of the area of focus increased" as a result of sponsoring a global grant scholar

*Source: Global Grant Scholars Surveys & Global Grant Sponsors Surveys*

The scholars' impact on Rotary is more subtle, as only a minority have joined a club or an alumni association. However, the global grant scholarship program itself is having an impact within Rotary through grant sponsors, who have gained a better understanding of the areas of focus by sponsoring scholars.

PERCENTAGE OF GRANTS AND SCHOLARSHIPS BY AREA OF FOCUS

Disease prevention and treatment
(44% of humanitarian grants, 25% of scholarships)

Water, sanitation, and hygiene
(22% of humanitarian grants, 8% of scholarships)

Community economic development
(13% of humanitarian grants, 20% of scholarships)

Basic education and literacy
(12% of humanitarian grants, 8% of scholarships)

Maternal and child health
(7% of humanitarian grants, 6% of scholarships)

Peacebuilding and conflict prevention
(2% of humanitarian grants, 32% of scholarships)

Humanitarian Grants

Scholarships

Source: Global Grant Scholars Surveys & Global Grant Sponsors Surveys

Scholarships are a significant part of global grants. Approximately 14% of all approved and closed global grants include a scholarship component. The most common areas of focus are different for scholarships and humanitarian grants, the largest global grant type. Peacebuilding and conflict prevention is the most popular area for scholarships, but it accounts for only 2% of humanitarian grants.

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WHERE GLOBAL GRAND SCHOLARS STUDY
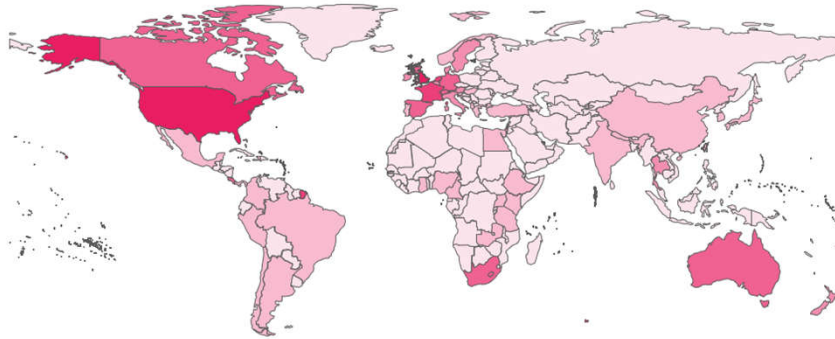
Legend: 0 | 1-5 | 6-20 | 21-50 | 51-100 | More than 100

2013-14 through 2021-22:
719 scholars studied in England; 338 studied in the U.S.

Source: Official Rotary records

Scholars tend to use their scholarships to study either in England or the United States.

INSTITUTIONS & FUNDING

Institution	Number of Scholars	World Fund (US$)	Total Funding (US$)
Oxford University	137	$2,069,504	$4,891,920
London School of Economics	112	$1,818,021	$4,291,489
London School of Hygiene and Tropical Medicine	90	$1,564,540	$3,404,822
Cambridge University	61	$967,338	$2,208,604
University of Sussex	58	$1,036,364	$2,164,333
King's College London	54	$948,352	$2,076,767
IHE Delft Institute for Water Education	51	$797,781	$2,482,455
University College London	42	$694,572	$1,676,112
Harvard University	41	$785,249	$1,638,246
University of London	39	$643,850	$1,506,009

Source: Official Rotary records; numbers are approximate

Oxford University and institutions in London host the most global grant scholars.

WHERE GLOBAL GRANT SCHOLARS COME FROM
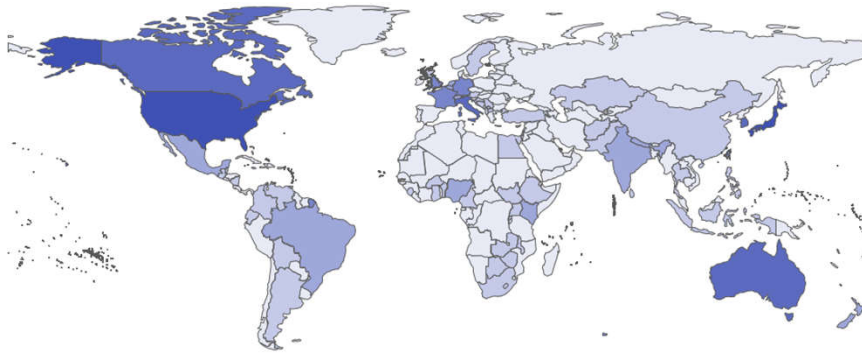
0 ▢ 1-5 ▢ 6-20 ▢ 21-50 ▢ 51-100 ▢ More than 100

2013-14 through 2021-22:
654 scholars came from the U.S.; 364 came from Japan

Source: Official Rotary records

The majority of scholars come from the United States and Japan.
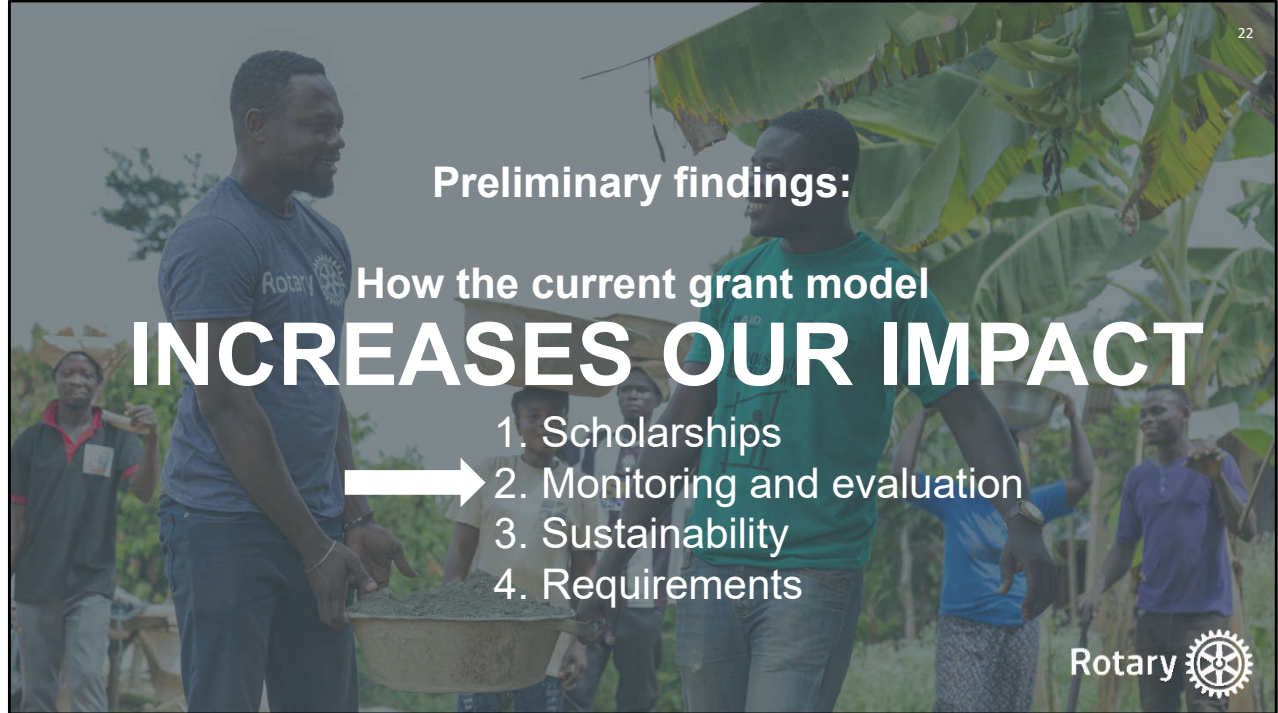
CHALLENGES

- Why some districts do not sponsor global grant scholars:
  - Difficult to find partners/hosts
  - Too much to spend on one person
  - Difficult to find scholars/nominees

- 35% of international sponsors said it was "difficult" or "very difficult" to find host sponsors

Source: District Rotary Foundation Chairs Surveys & Global Grant Sponsors Surveys

Our research has uncovered some challenges in the global grant scholarships program. Some districts do not participate in the program because it is difficult to find qualified scholars and partners.

Districts can be reluctant to sponsor global grant scholars because they believe US$30,000 is too much to spend on one person when it could fund an entire project. This was a common concern among survey respondents.

The general secretary also hear concerns about the cost of global grant scholarships.

Preliminary findings:

How the current grant model
INCREASES OUR IMPACT
1. Scholarships
→ 2. Monitoring and evaluation
3. Sustainability
4. Requirements

Rotary

We explored how members are using their monitoring and evaluation data to increase our impact:

- Are global grant project sponsors collecting monitoring and evaluation data? Why or why not?

- How do sponsors use the data they collect?

- How do data collection and usage differ by area of focus?

- Could we require a certain level of data collection from sponsors or their partners?

DATA SOURCES
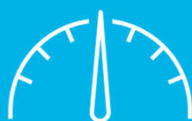
Surveys in 2023 of:
- International and host sponsors of closed global grant projects
- District chairs (DRFCs, DISCs)

Previous reviews of:
- Grant applications
- Grant final reports

Previous interviews and focus groups with:
- Regional grants officers
- Regional grants managers
- The Rotary Foundation Cadre of Technical Advisers

Our insights are based on several surveys, Rotary's official records, and focus groups.

We sent the 2023 global grant sponsor survey to international and host sponsors whose global grant projects closed in 2021-22 and 2022-23, including those with canceled grants. This completes our survey of all global grant sponsors with closed grants since 1 July 2015. In 2020-21, we surveyed all sponsors of global grant projects closed in 2015-16, 2017-18, and 2019-20. In 2021-22, we surveyed all sponsors of global grant projects closed in 2016-17, 2018-19, and 2020-21.

We sent the 2023 district chair survey to all 2022-23 district Rotary Foundation chairs and district international service chairs who had valid email addresses and allowed Rotary to contact them by email.

Our evaluation also draws on findings from 2020-21 and 2021-22 reviews of grant applications and final reports, as well as discussions with regional grants officers, regional grants managers, and Cadre members.

PROMISING FINDINGS

- **90%** of sponsors follow up on their projects at least annually

- **86%** of sponsors gather outcome-level data on their projects

- **84%** of sponsors use monitoring data to improve their projects

- **75%** of sponsors of closed projects still collect monitoring data regularly

- **40%** of host club members and nearly a quarter of local partner or beneficiary organizations are responsible for collecting data

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

As we strive to increase our ability to measure Rotary's impact, our findings are promising.

Of 1,237 Rotary global grant sponsors, 90% reported in the 2020-24 GME Global Grant Sponsor Survey in 2023 that they check on their projects annually, quarterly, monthly, weekly, or daily; only 10% never check on their completed projects. Also, 75% still collect monitoring data regularly. This suggests that sponsors may be willing to officially report longer-term outcomes of their projects to Rotary once a year.

Overall, 86% of sponsors said they collect outcome-level data on their projects, and 84% said they use monitoring data to improve their projects.

Survey participants report that host Rotary club members (40%) are primarily responsible for collecting data. However, different entities may also carry this responsibility, including local partner organizations (24%) and beneficiary organizations (24%), such as hospitals and schools. This is promising because Rotary members, as volunteers, may have limited time for data collection and some members work with experts to collect data, indicating a desire to measure results.

In the survey, sponsors were asked whether, as a result of their project, any local or national governmental or institutional policies or practices were created, modified, or implemented. Although nearly half of respondents didn't know the answer, 22% reported using data to influence change beyond completing project activities. These efforts could serve as promising examples of sustainable, longer-term, positive outcomes. Next, we will review more findings about sustainability.

CHALLENGING FINDINGS

- Rotary lacks a shared understanding of monitoring, evaluation, research, and learning concepts.

- Rotary members do not regularly collect monitoring data.

- The data members collect on global grant projects is mostly immediate and short-term, so Rotary can't gauge long-term results.

- Rotary needs an effective system for collecting and reporting data and evaluating impact.

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

Rotary lacks a consistent understanding of monitoring, evaluation, research, and learning concepts – this refers to the process through which information generated from monitoring and evaluation is reflected upon and intentionally used to continuously improve a project's ability to achieve results. Definitions of measurement and impact also vary across the organization.

Sponsors self-report collection and usage of data at rates that are not consistent with what Cadre members see during interim monitor visits, or in final reports.

The data Rotary does have on global grant projects is primarily output level, which means something that is short-term change, or the change expected to occur immediately as a direct result of activities, such as the number of people trained. Output does not tell you why that change mattered. Rotary aims for its projects to achieve longer-term change or outcomes. Gathering outcome level data supports the strategic objective to increase our impact.

Even if some members collect excellent data on global grant projects, we currently lack a system and processes to effectively collect and report on data and evaluate long-term outcomes and impact. The current structure of Rotary grants does not encourage quality data collection or usage. TRF does not yet have a system to capture or report on output, outcome or impact data from global grant funded projects.

However, under the umbrella of the Action Plan to "Increase our Impact," the Secretariat is moving toward creating requirements that move beyond output level data collection. Efforts are being made to increase Rotary member awareness and capacity to collect outcome data by engaging Cadre, Rotary Action Group members, and district and regional leaders. When updates are implemented to the grant application, we will be able to collect more data which the Research and Evaluation team at the Secretariat can evaluate and report on.

OUTPUT AND OUTCOME DATA IS COLLECTED PRIMARILY BY HOST SPONSORS

Was data about outputs and outcomes collected for your project?

Yes 87%
No, 3%
I don't know, 10%
Outputs (N=1253)

Yes 86%
No, 4%
I don't know, 11%
Outcomes (N=1242)

40% of sponsors reported that **host sponsors were responsible** for collecting data

60% of sponsors said **data collection was a low priority**

15%-16% of international sponsors did not know if data was collected

4%-6% of host sponsors did not know if data was collected

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

We defined the following terms in the global grant sponsor survey:
Data is defined as information collected about a project's outputs and outcomes.
Outputs are the immediate results of a project, such as number of people trained.
Outcomes are the short-term or intermediate results of a project, such as teachers using new methods of teaching in the classroom.

In the 2023 sponsor survey, the majority of grant sponsors reported that output (87%) and outcome (86%) data was collected for their project, and 40% said data collection was the responsibility of the host sponsor. Only 3%-4% of respondents did not collect any data, but 60% said data collection was a low priority. Notably, 10%-11% of respondents didn't know whether data was collected on their project. When we looked at these results by sponsor type, we found that more international sponsors than host sponsors didn't know if data was collected: 15% of international sponsors versus 4% of host sponsors for output data, and 16% of international sponsors versus 6% of host sponsors for outcome data.

This raises interesting questions about the global grant structure: Is the host entirely responsible for all project-related activities after the international sponsor provides funding? Do international sponsors have less of an interest in how their financial investment is used? We see international sponsors involved in designing projects and writing grant applications. Don't we want them to learn from project outputs and outcomes?

DATA IS COLLECTED IN ALL PROJECT PHASES, BUT BASELINE DATA MAY BE MISSING

During which phase(s) of the project was data collected?
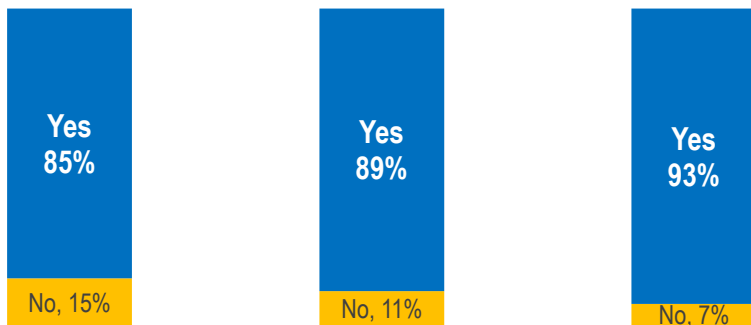
Before the project started (N=1028)	During the project (N=1026)	After the project ended (after project funds were expended) (N=1046)
Yes 85%	Yes 89%	Yes 93%
No, 15%	No, 11%	No, 7%

84% of sponsors **used data to improve the project**

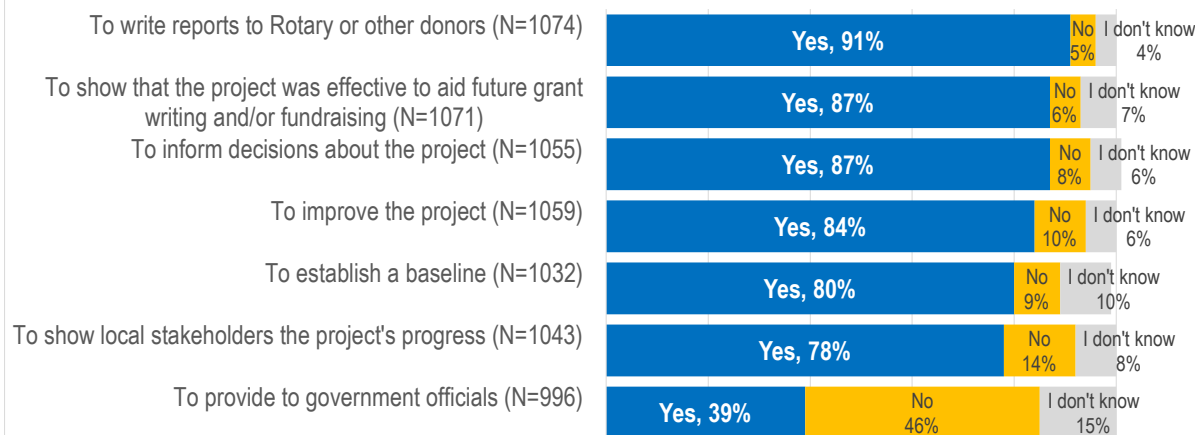**92% of host** and **77% of international sponsors** used data for this reason

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

It is promising that most project sponsors collect data during all phases of the project. However, 15% of sponsors said data wasn't collected before their project started. This means they're missing baseline data, and the opportunity to compare it with data collected during and after the project to determine their progress toward output and outcome goals. Overall, 84% of sponsors said they used monitoring data to improve their project; 10% did not. Host and international sponsors responded differently: 92% of host sponsors versus 77% of international sponsors said they used monitoring data to make project improvements. This highlights a common dynamic between host and international partners on global grant projects: Host sponsors, more often than international sponsors, ensure that data collection leads to improved project activities.

DATA IS MAINLY USED TO WRITE REPORTS FOR ROTARY AND DONORS

In which way(s) was the data used?

Category	Yes	No	I don't know
To write reports to Rotary or other donors (N=1074)	91%	5%	4%
To show that the project was effective to aid future grant writing and/or fundraising (N=1071)	87%	6%	7%
To inform decisions about the project (N=1055)	87%	8%	6%
To improve the project (N=1059)	84%	10%	6%
To establish a baseline (N=1032)	80%	9%	10%
To show local stakeholders the project's progress (N=1043)	78%	14%	8%
To provide to government officials (N=996)	39%	46%	15%

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Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

This graph shows how Rotary global grant sponsors said they used their data. Writing reports to Rotary ranked at the top, followed by showing that the project was effective to aid future grant writing and/or fundraising and informing decisions about the project. We did not see significant differences when we looked at the data by area of focus. Sponsors' survey responses were similar to what Cadre members shared in focus groups: Sometimes data is collected only for reporting to The Rotary Foundation, but other times it is used more substantively. Sponsors also reported using data to show that the project was effective for future grant writing and fundraising, to improve their projects, to show local stakeholders the project's progress, and to provide it to government officials.

TOP GOALS ACHIEVED BY AREAS OF FOCUS

DPT: 34% of sponsors aimed to strengthen health care systems; **96% achieved their goal**

WASH: 56% of sponsors aimed to facilitate universal and equitable access to safe and affordable drinking water; **99% achieved their goal**

CED: 49% of sponsors aimed to develop opportunities for productive work and improve access to sustainable livelihoods; **93% achieved their goal**

BEL: 89% of sponsors aimed to support programs that strengthen a community's ability to provide basic education and literacy to all; **94% achieved their goal**

MCH: 37% of sponsors aimed to improve access to essential medical services, health care providers, and trained community health workers; **89% achieved their goal**

PCP: 40% of sponsors aimed to train community members in peace education, peace leadership, and conflict prevention and resolution; **100% achieved their goal**

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

The areas of focus are listed in order of frequency among global grant-funded humanitarian projects. Although our survey asked about supporting the newest area of focus, the environment, we didn't receive enough responses from environmental project sponsors to draw conclusions about their goals.

1. Within disease prevention and treatment, 34% of sponsors said their primary goal was to strengthen health care systems; 96% of them reported achieving it.
2. Within water, sanitation, and hygiene, 56% of sponsors said their primary goal was to facilitate universal and equitable access to safe and affordable drinking water; 99% of them reported achieving it.
3. Within community economic development, 49% of sponsors said their primary goal was to develop opportunities for productive work and improve access to sustainable livelihoods; 93% of them reported achieving it.
4. Within basic education and literacy, 89% of sponsors said their primary goal was to support programs that strengthen a community's ability to provide basic education and literacy to all; 94% of them reported achieving it.
5. Within maternal and child health, 37% of sponsors said their primary goal was to improve access to essential medical services, health care providers, and trained community health workers; 89% of them reported achieving it.
6. Within peacebuilding and conflict prevention, 40% of sponsors said their primary goal was to train community members in peace education, peace leadership, and conflict prevention and resolution; 100% of them reported achieving it.

HOW DO SPONSORS DEMONSTRATE THAT GOALS WERE ACHIEVED?
TRENDS IN OUTCOME DESCRIPTIONS

- Most sponsors reported output data.
- Few sponsors reported tangible and intangible outcome data, yet their responses suggest a desire for evaluating outcomes after project closure.
- Several sponsors considered photographs to be outcome data.
- There is some confusion about what outcome data is:
  o Some sponsors shared needs assessments.
  o Some sponsors shared their own perceptions.

We followed up with an open-ended question, asking sponsors what outcome data demonstrated that they'd achieved their goals. As a host sponsor said in our survey, it is important to "be able to see future evaluations as well as the progress of the project. … I believe skill transfer and education are more sustainable in this sense." However, our 2023 survey results confirm what experts including members of The Rotary Foundation Cadre of Technical Advisers and Rotary Action Groups and regional grant officers highlighted during interviews in spring 2021 about monitoring and evaluation (M&E) data.

Sponsors' answers revealed the following trends:
- Measuring outcomes is important to increasing our impact, one of the priorities of Rotary's Action Plan. Often, Rotary members mistakenly believe that outputs equal impact. Rotary's standard measures have focused on outputs, which may contribute to this misunderstanding and that most sponsors only reported output data. One international sponsor wrote: "(1) Trained all teachers and staff on new teaching techniques. (2) Trained and established a new middle school program. (3) Trained preschool teachers and new childcare center staff on education and programing for children birth to age 5. (4) Provided training to teachers and staff on trauma-based education." These outputs — the various trainings — are important to measure, but what was the outcome of these trainings? Did they help improve anything?
- Few reported tangible and intangible outcome data, yet their responses suggest a desire for evaluating outcomes after project closure. One international sponsor wrote: "Tangible — higher test scores. Intangible — teachers and principals stating what we've provided has (a) helped students and (b) improved teacher effectiveness."
- Several sponsors considered photographs to be outcome data. This may stem from the challenges of collecting data through observation during the COVID-19 pandemic. One international sponsor wrote: "The schools involved sent photos and reports that were used to share with contributing clubs here."

- There is some confusion about what outcome data is:
  - Some respondents shared information about their needs assessments. One host sponsor wrote: "The community feedback, that showed [which of] the children [should be] targeted by the project."
  - Some sponsors shared their perceptions of their project's accomplishments rather than data. One host sponsor wrote: "E-learning helped the assimilation of topics much better than the conventional education system. Usage of multi-media is more enjoyable and effective."

As the previous slides show, sponsors say they're collecting and using data in their global grant-funded projects. However, we've noticed a disconnect between what sponsors self-report and what Cadre members see in the field, the quality of reports submitted to the Foundation, and sponsors' answers to open-ended survey questions.

A large portion of interim monitor visits by Cadre members have revealed that project sponsors have not collected any data, neither before nor during the project. Many of the interim monitor reports note that data will be collected at the end rather than during the project.

Previous findings from focus group discussions also highlighted this inconsistency. Cadre members expressed frustration with the type of data requested by the Foundation. They noted that when sponsors submit an application, they're asked to select from standard measures that may not yield a true understanding of a project's outcome.
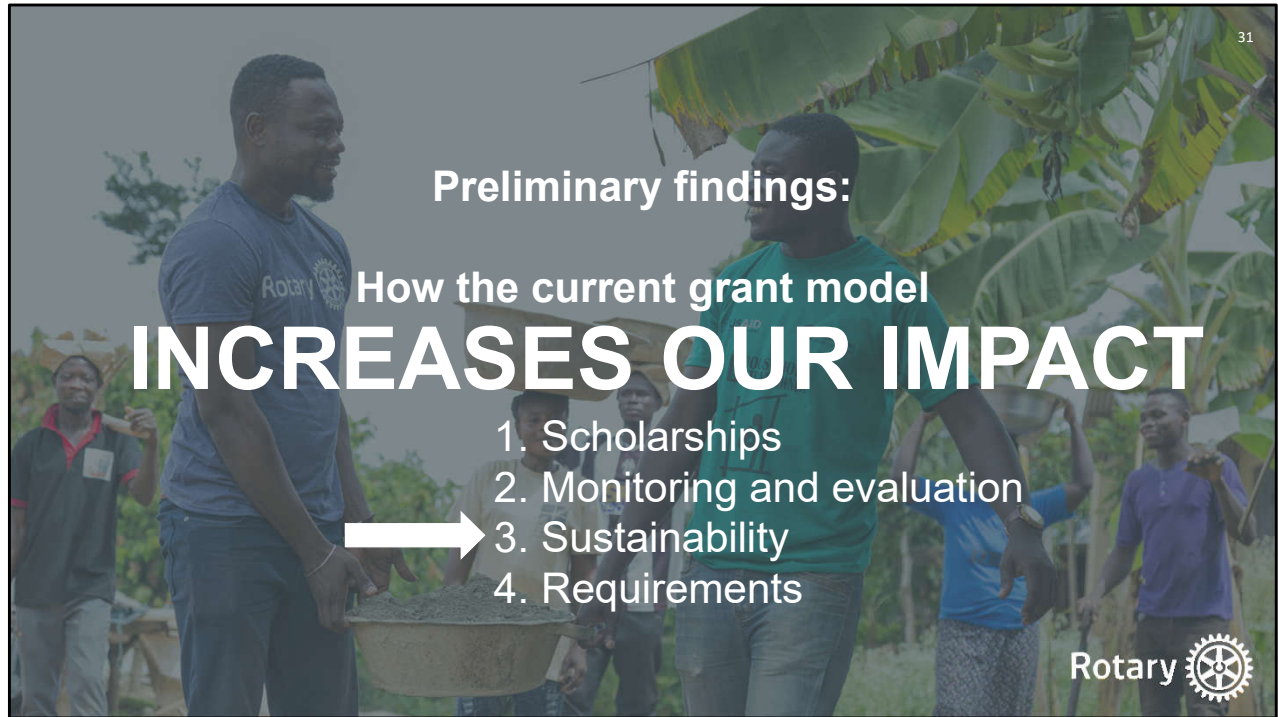
We explored how members plan for and implement activities that promote sustainability:

- How sustainable are projects that were completed 3-5 years ago? Have the intended benefits been sustained?

- How are sponsors implementing the training component that's often recommended as part of the sustainability goal?

- Do Rotary members agree with sustainability as a goal?

PURPOSE OF SUSTAINABILITY SITE VISITS

- Sustainability site visits help us understand our progress toward increasing our impact, one of the priorities of our Action Plan.

- What we learn will help us make improvements to the global grant application and reporting process.

SUSTAINABILITY SITE VISIT CRITERIA AND TIMELINE

- Current focus on basic education and literacy (educational equipment/technology and training projects funded by global grants)
- Projects closed 3-5 years ago
- July 2023 training on conducting sustainability site visits to be held in India for 20 Cadre members
- Research & Evaluation team is in planning stages to have 20 site visits conducted during 2023-24 Rotary year
- Findings will be shared in final report in the fifth year of this grant model evaluation cycle

The Research & Evaluation team is focusing on the sustainability of basic education and literacy projects — specifically, educational equipment/technology and training projects funded by global grants. Sustainability site visits will be conducted for projects that closed three to five years ago, allowing us to see how well their outcomes have been sustained. Through these visits, Rotary can learn about the successes and challenges of this project type and help our members design and implement more sustainable projects.

Twenty members of the Cadre of Technical Advisers will be attending an in-person training in Pune, India, to learn how to use our sustainability data collection tool and conduct a successful site visit that will provide the Foundation with usable and actionable data on global grant projects.

VOLUNTEER PERSPECTIVES

- Sponsors prefer long-term, sustainable global grant projects:
  - **95%** say the objective to address community-identified issues with a focus on sustainability is extremely or very important to them
  - **75%** prefer to address poverty and inequity rather than an emergency need
  - **55%** prefer long-term club involvement in global grant projects
  - **46%** prefer to sponsor a global grant project that provides goods or services
  - **43%** prefer a project that provides training and/or transfer of knowledge

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

In our 2023 survey:

95% of sponsors said the objective to address community-identified issues with a focus on sustainability is extremely (67%) or very important (28%) to them. This objective is more important to respondents than improving the public image of Rotary, building fellowship and cultural understanding between sponsors, or enhancing fellowship among members through international service.

75% of respondents would prefer to sponsor a project that addresses poverty and inequity in a country, whereas 14% would prefer to address an emergency need, and 11% aren't sure.

55% of sponsors prefer long-term club involvement (at least 3 years) in global grant projects, whereas 34% prefer short-term involvement (less than 1 year), and 11% aren't sure.

46% of respondents would prefer to sponsor a project that provides goods (such as distribution of medical equipment) or services (such as surgery), whereas 43% would prefer to provide training and/or transfer of knowledge (such as for teachers or nurses), and 11% aren't sure.

Preliminary findings:

How the current grant model
INCREASES OUR IMPACT
1. Scholarships
2. Monitoring and evaluation
3. Sustainability
→ 4. Requirements

Rotary
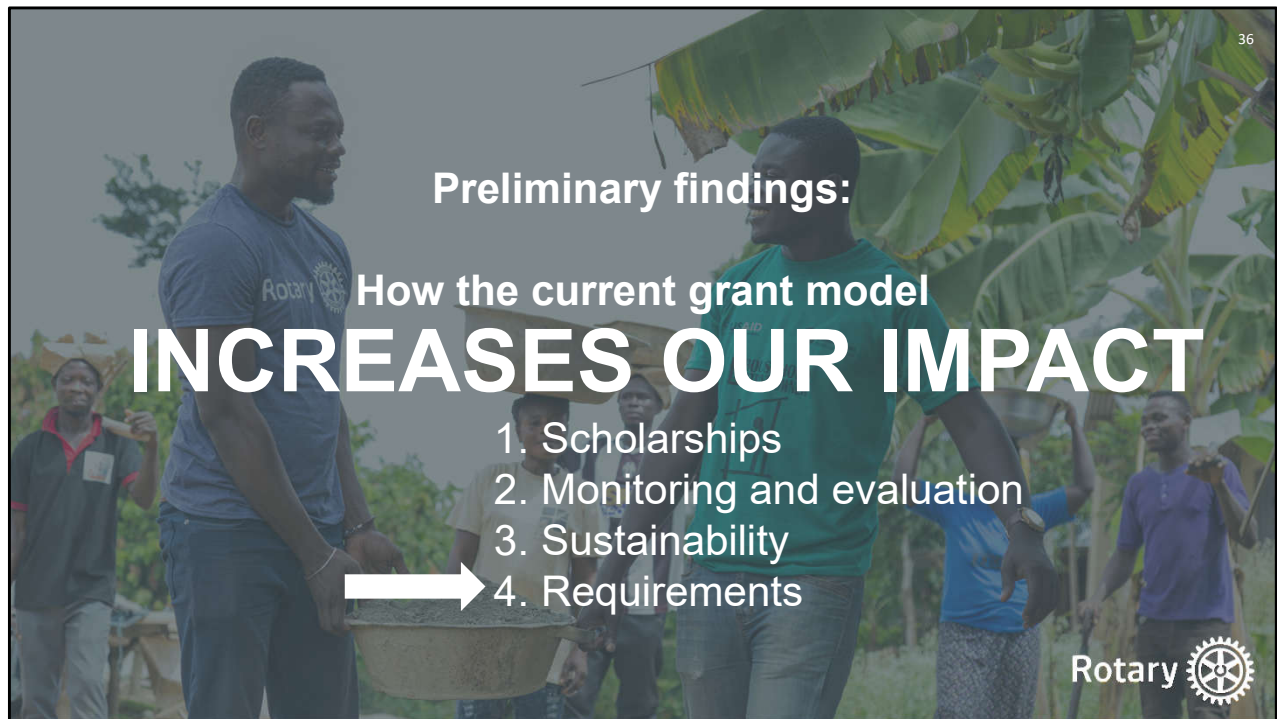
We explored how the global grant requirements that aimed to increase our impact — such as the community assessment, funding amount, partnership between host and international sponsors, and alignment of activities with one of the areas of focus — are perceived by grant applicants and sponsors.

Note that in the 2023 survey sent to all district Rotary Foundation chairs and district international service chairs with valid email addresses, more than half of district chairs (54%) reported that districts have their own requirements for qualifying clubs to participate in global grants, in addition to the Foundation's two minimum requirements:
1. The club agrees to and signs the club memorandum of understanding
2. At least one club member participates in the district's grant management seminar

More than 90% of the districts that have additional requirements ask clubs to:
- Be qualified to apply for district grant funds (95%)
- Be up to date on reporting for all open grants (93%)
- Align all including district grant projects with an area of focus (91%)
- Not owe any Rotary International or district dues (91%)

These additional requirements may increase the perception that the Foundation expects too much from grant applicants. We'll explore this further in 2023-24. On the following slides, we will concentrate on our members' perception of Foundation requirements that aimed to increase our impact:

- Which global grant objectives have yielded global grant requirements such as conducting community assessments, matching funding, forming partnerships, and aligning project activities with one of the areas of focus?

- Are they easy or difficult for global grant applicants and sponsors to meet? Why?

- Do the requirements lead to increasing our impact, or help in any other way during the global grant process?

MOST IMPORTANT OBJECTIVE ALIGNS WITH COMMUNITY ASSESSMENT REQUIREMENT

Here are some of the objectives of global grants. How important to you is each of these objectives?

To build fellowship and cultural understanding between sponsors (N=1682)

| Extremely important 40% | Very important 42% | 14% | 3% | 1% |

To enhance the fellowship among members through international service (N=1685)

| Extremely important 40% | Very important 44% | 11% | 4% | 1% |

To improve the public image of Rotary (N=1687)

| Extremely important 50% | Very important 35% | 11% | 3% | 1% |

To address community-identified issues with a focus on sustainability (N=1689)

| Extremely important 67% | Very important 28% | 3% | 1% | 0% |

■ Extremely important ■ Very important ■ Somewhat important ■ A little bit important ■ Not at all important ■ Not sure

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

The global grant objective that is extremely (67%) and very important (28%) to most international and host sponsors is "to address community-identified issues with a focus on sustainability." So, let's review additional results about the community assessment requirement next. Then we will look at funding and partnership requirements.

The two program objectives "to build fellowship and cultural understanding between sponsors" and "to enhance the fellowship among members through international service" align with the partnership requirement.

MOST SPONSORS THINK COMMUNITY ASSESSMENTS MAKE PROJECTS SUSTAINABLE

Do you think requiring community assessments makes global grant projects more sustainable?

I don't know, 12%
No, 4%

I don't know, 4%
No, 2%

Yes
84%

Yes
95%

During project design,
85% of host sponsors
and
33% of international sponsors
conduct the community assessment.

International

Host

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

Most sponsors think community assessments make projects more sustainable.

When asked what tasks their partners perform during the project design phase of projects, respondents said that 85% of host sponsors and 33% of international sponsors conduct the community assessment.

"In trying to do the Community assessment, the international project leaders must also be on the ground to understand what needs to be in the community assessment. Also, to understand what will be the outcome of the project if completed successfully."

— International sponsor, spring 2023

"Our International Sponsor visited our Country, met with the club and got involved … , visited the project in mind. … We built up a wonderful working relationship and subsequently were partners on 6 Global Grants."

— Host sponsor, spring 2023

Rotary

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

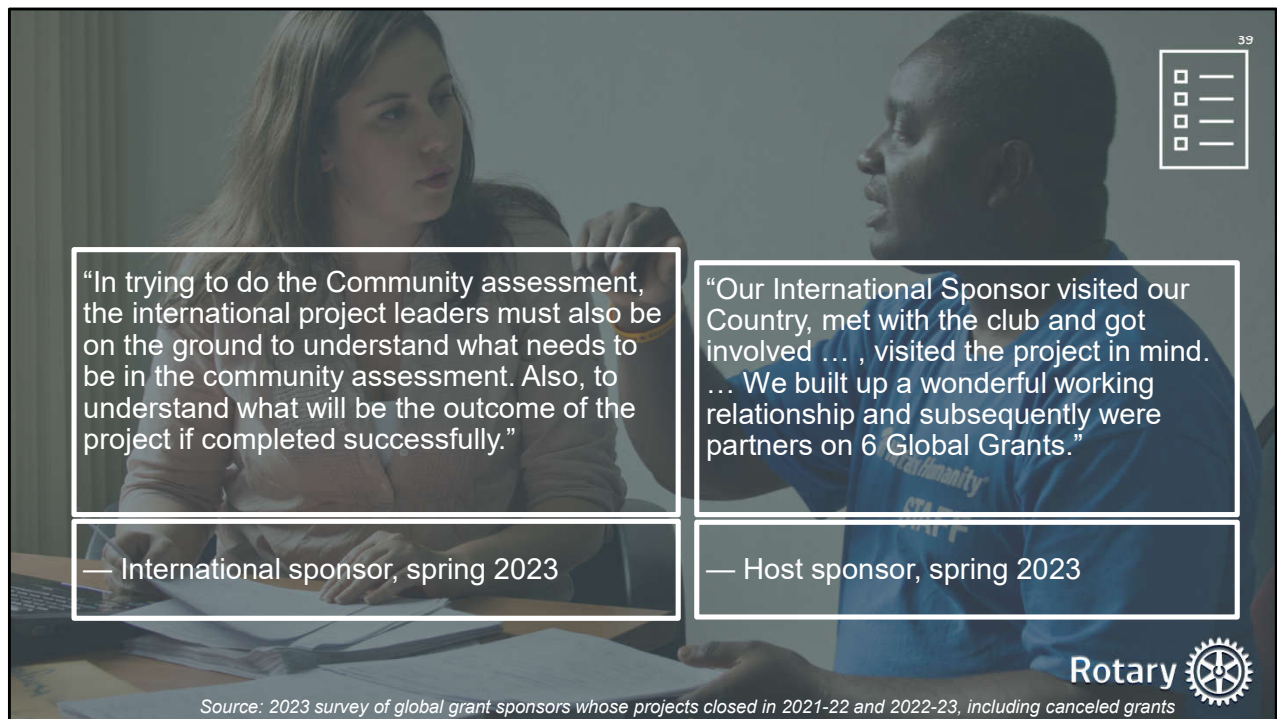An important part of forming successful partnerships and establishing outcome measures to increase our impact is developing a common understanding about who is conducting community assessments, thereby learning about the community and issues the project seeks to address. Some international and host sponsors are aware of the need to involve both partners in community assessments.
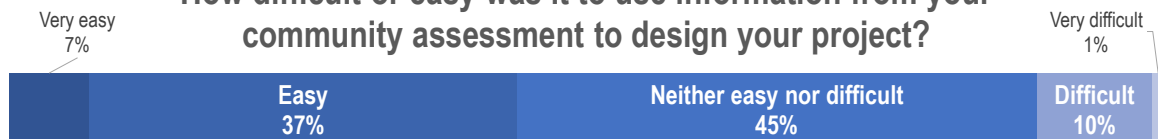
FOR MOST SPONSORS, CONDUCTING COMMUNITY ASSESSMENTS OR USING THEM TO DESIGN PROJECTS IS NEITHER EASY NOR DIFFICULT

How difficult or easy was conducting a community assessment?

Very easy 5%
Very difficult 2%

| Easy 23% | Neither easy nor difficult 53% | Difficult 18% |
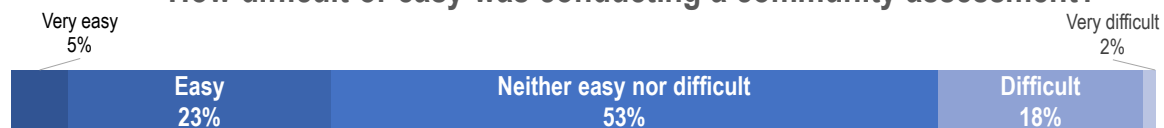
How difficult or easy was it to use information from your community assessment to design your project?

Very easy 7%
Very difficult 1%

| Easy 37% | Neither easy nor difficult 45% | Difficult 10% |

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

Conducting community assessments has not been very difficult (2%) or difficult (18%) for many sponsors. The majority of sponsors (53%) said it was neither easy nor difficult, and more than a quarter found it very easy (5%) or easy (23%).

Using the information from community assessments to design projects has not been very difficult (1%) or difficult (10%) for many sponsors. Nearly half of sponsors (45%) said it was neither easy nor difficult, and almost as many (a total of 44%) found it very easy or easy.

The key is for districts to provide community assessment training, and for applicants and sponsors to attend. Slightly less than half of sponsors (49%) said they received training on how to conduct community assessments before designing their projects. More host sponsors (58%) than international sponsors (38%) said they received such training. All sponsors mainly received this training through district grant management seminars (86%) but also through Rotary publications (66%) and the Learning Center (65%). Another 60% of sponsors learned about community assessments through their professional careers.
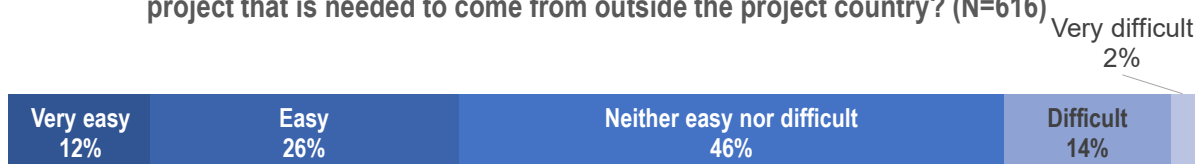
FOR MOST HOST SPONSORS, FINDING FUNDING WOULD BE DIFFICULT WITHOUT AN INTERNATIONAL PARTNER

Could you have secured the necessary funding for the project without the financial support of the international sponsor? (N=485)

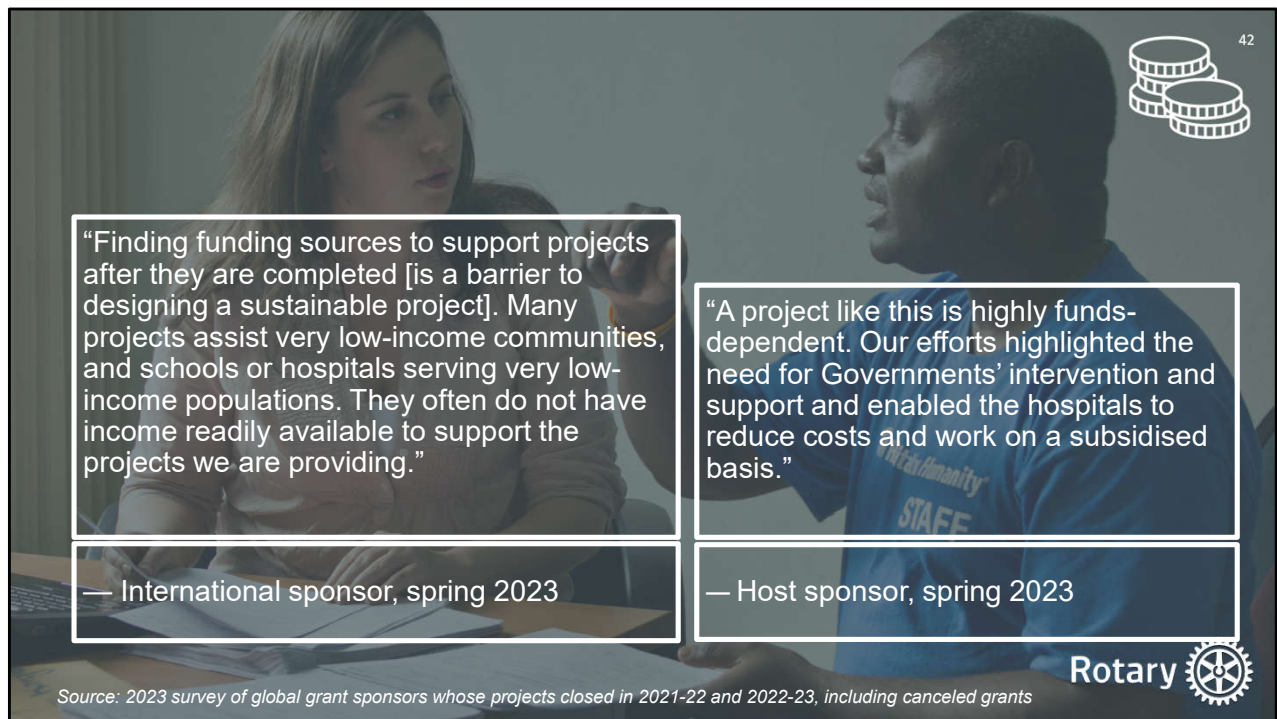| Yes 18% | No 73% | I don't know 9% |
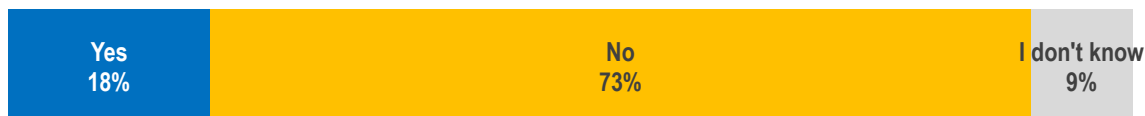
How difficult or easy was it to raise the money for the 15% contribution for your project that is needed to come from outside the project country? (N=616)

Very difficult 2%

| Very easy 12% | Easy 26% | Neither easy nor difficult 46% | Difficult 14% |

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

Most host sponsors (73%) answered "No" to the question "Could you have secured the necessary funding for the project without the financial support of the international sponsor?" The requirement to raise the 15% contribution from outside the project country was either very difficult (2%) or difficult (14%) for host sponsors. However, nearly half of sponsors (46%) said it was neither easy nor difficult, and more than a third found it very easy (26%) or easy (12%).

(Note that most sponsors who had responded to the survey applied for these global grant funded projects prior to the change in World Fund matching that took effect on 1 July 2021. The World Fund match of District Designated Funds (DDF) has been reduced from 100% to 80% when being used for global grants. Find out more about The Rotary Foundation Trustees' approved policy changes in matching to help balance financial resources with program demands here: https://my.rotary.org/en/rotary-foundation-approves-changes-funding-model-set-take-effect-1-july-2021)

"Finding funding sources to support projects after they are completed [is a barrier to designing a sustainable project]. Many projects assist very low-income communities, and schools or hospitals serving very low-income populations. They often do not have income readily available to support the projects we are providing."

— International sponsor, spring 2023

"A project like this is highly funds-dependent. Our efforts highlighted the need for Governments' intervention and support and enabled the hospitals to reduce costs and work on a subsidised basis."

— Host sponsor, spring 2023

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants
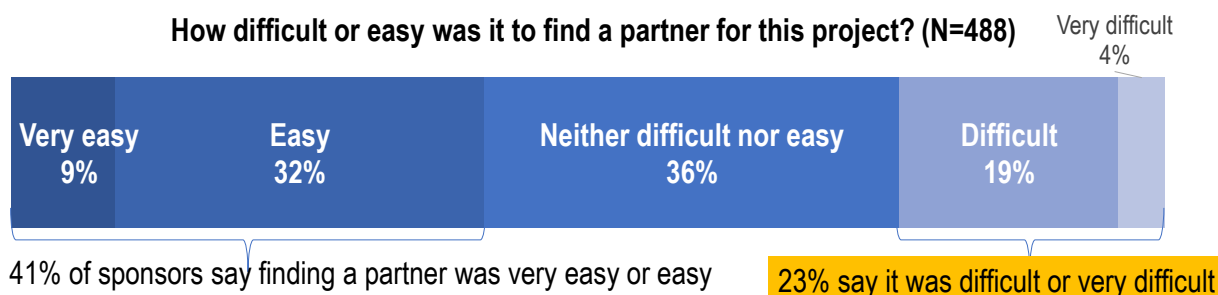
The global grants process is intended to ensure that projects have considered the financial needs of maintaining project outcomes after all grant funds have been expended. Sponsors report that it can be difficult to guarantee that projects are sustainable if a system to access funds after project closure isn't established.

The Rotary Foundation could ensure that funding sources are available for projects after global grants are closed by holding sponsors responsible for training beneficiary or partner organizations on fundraising for the project. Some projects we reviewed did not have documented agreements with cooperating and partner organizations that would be responsible for sustaining project outputs and outcomes. How TRF measures these outputs and outcomes will be a continued area of review.

Global grant funding requirements seem to rely on the formation of partnerships to secure enough funding. Let's look at findings about the partnership requirement between international and host sponsors next.

For nearly a quarter of sponsors, finding project partners has been very difficult (4%) or difficult (19%). This is more than the proportion of sponsors who have found it difficult to conduct the community assessment or raise the 15% contribution. Forming partnerships takes more than six months, according to 28% of sponsors. Some report that coming to an understanding with their partner and signing a memorandum of understanding (MOU), a requirement of the global grant process, causes this delay. For example, one sponsor wrote, "Global grant MOU are cumbersome." Some also mentioned communication barriers. However, only 15% of sponsors said that communicating with their project partner was either somewhat difficult (12%) or very difficult (3%). Nearly half found communicating with partners very easy (45%). Easing the burden of finding partners may decrease delays during the global grant application process and increase participation in the program.

Consider this data alongside other survey results. District chairs reported in the 2023 district chair survey that finding partners is the most difficult requirement for clubs in their district: 31% of district Rotary Foundation chairs and district international service chairs reported it to be extremely or very difficult, followed only by community assessments (27%) and securing funding (19%). When asked how the global grant process could be improved, a district international service chair wrote, "Global Grant is a good tool to address community need, only difficult part is to get [an] International partner."

However, also note in the graph above that most sponsors have found it very easy (9%), easy (32%), or neither difficult nor easy (36%) to find project partners. Interestingly, when asked how they find partners, most sponsors (29%) reported working with districts or clubs they've partnered with on previous projects. For those who are repeat participants in global grants, finding partners may be easier because they can work with existing partners. We will analyze this further in 2023-24, when we evaluate the reasons for not participating, and not repeating participation, in global grants.

PARTNERSHIPS MEET SPONSORS' EXPECTATIONS, WHICH ALIGN WITH THE PURPOSE OF THE REQUIREMENT

Overall, did your partnership fall short, meet, or exceed your expectations?

International (N=607):
- Fell short of expectations, 12%
- Met expectations 55%
- Exceeded expectations 34%

Host (N=483):
- Fell short of expectations, 3%
- Met expectations 67%
- Exceeded expectations 31%

Top three expectations align with partnership requirement's purpose:

International sponsors expect and receive:
- Friendship
- Better cultural understanding
- Country/location expertise

Host sponsors expect and receive:
- Friendship
- Financial support for the project
- Opportunity to share country/culture

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

The original purpose of requiring a host and international sponsor for each global grant was (1) to build fellowship and cultural understanding and (2) to enhance fellowship among members through international service. To determine whether this requirement is serving its purpose, we first asked sponsors if their partnership feel short, met, or exceeded their expectations.

Overall, 93% said their expectations were either met (60%) or exceeded (33%). Note that more host sponsors (98%) said their expectations were met (67%) or exceeded (31%) than international sponsors, 89% of whom said their expectations were met (55%) or exceeded (34%).

Then we asked sponsors what they expect from their partnerships and whether these expectations have been met. On the slide, the top three expectations are listed for international sponsors and for host sponsors. Both groups expect and receive friendship and an opportunity for cultural exchange and learning through international service. Note that host sponsors also expect to receive financial support for projects through their international partnerships.

International sponsors:
- 89% expected and 87% received friendship with members of the host sponsor club or district
- 87% expected and 85% received better cultural understanding of the host sponsor's country
- 84% expected and 82% received country/location expertise

Host sponsors:
- 91% expected and 83% received friendship with members of the international sponsor club or district
- 90% expected and 90% received financial support for the project
- 85% expected and 78% received an opportunity to educate international sponsors about their country or culture

DURING PROJECT DESIGN AND IMPLEMENTATION, HOST SPONSORS TAKE ON THE MAJORITY OF TASKS

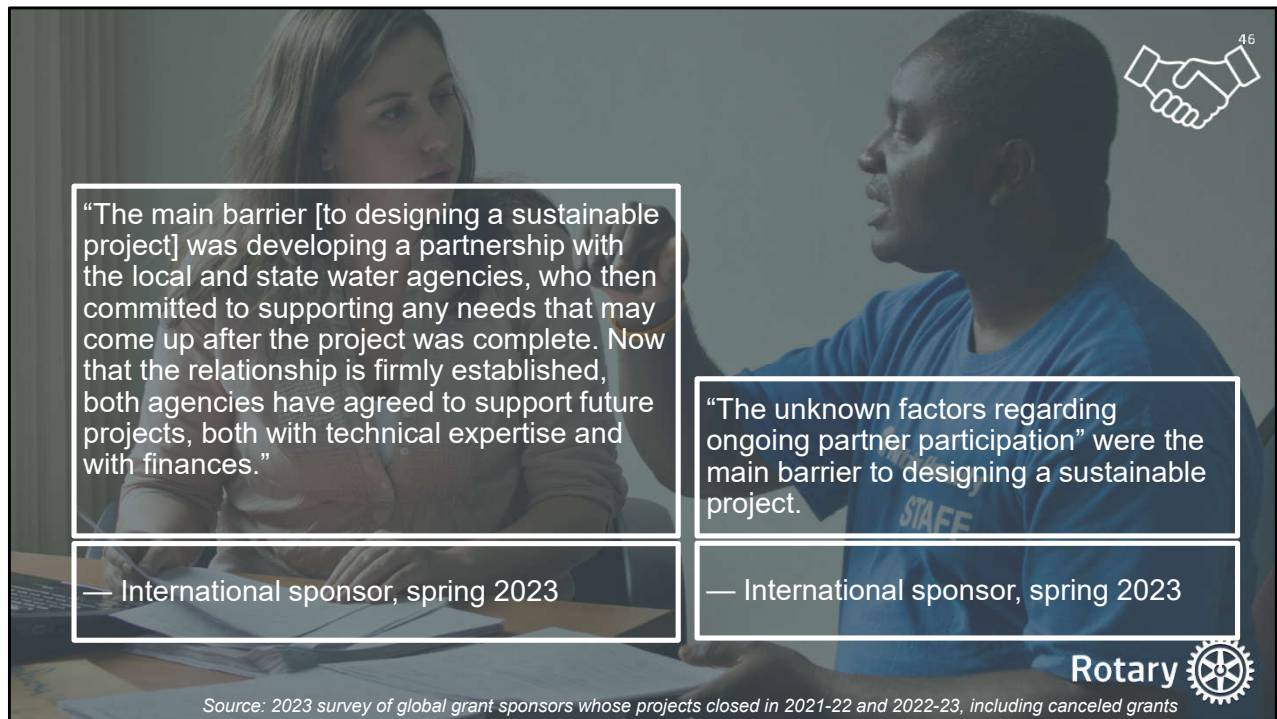| Tasks performed during project design	By host sponsor club/district*	By international sponsor club/district*
Established connections with local partners	**88%**	**54%**
Conducted the community assessment	**85%**	33%
Contributed technical expertise to the project design	**78%**	**49%**
Wrote the global grant application	74%	**48%**
Organized events to support the project (such as fundraisers)	52%	**48%**
Tasks performed during project implementation	**By host sponsor club/district***	**By international sponsor club/district***
Visited the project site	**93%**	**71%**
Assisted in measuring and evaluating the project outcomes	**89%**	**51%**
Publicized the project	**88%**	**52%**
Carried out the activities of the project	83%	34%
Managed project funds	83%	40%
Contributed technical expertise to the project	76%	47%

* Only "yes" responses to host or international club/district members performing the tasks are shown in this table.
Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

This table shows the percentage of global grant sponsors who answered "yes" to the items in the question "During the design/implementation of the project, which of the following tasks were performed by members of the host/international sponsor club or district?" ("No" and "not sure" responses are not shown.) The top three tasks performed during project design and implementation are highlighted in bold for both host and international sponsors.

Members of the host sponsor club or district perform most tasks during the design and implementation of projects. For nearly every task listed, more than three-quarters of respondents said host sponsors performed that task. However, about half of international sponsors also perform tasks during the design of the project, including establishing connections with local partners, contributing technical expertise, writing the application, and organizing events such as fundraisers. During the implementation of the project, 71% of international club or district members visited project sites, and slightly more than half were involved in publicizing the project and assisting in measuring and evaluating project outcomes.

Note that both host and international sponsors establish connections with local partners during project design. We aim to evaluate partnerships that reach outside Rotary, but we often lack updated contact information or easily aggregated data about non-Rotary entities partnering on global grant projects.

"The main barrier [to designing a sustainable project] was developing a partnership with the local and state water agencies, who then committed to supporting any needs that may come up after the project was complete. Now that the relationship is firmly established, both agencies have agreed to support future projects, both with technical expertise and with finances."

— International sponsor, spring 2023

"The unknown factors regarding ongoing partner participation" were the main barrier to designing a sustainable project.

— International sponsor, spring 2023

Rotary

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

Consider the comments from sponsors who say the main barrier to creating sustainable projects is establishing partnerships with non-Rotary entities.

We noted on the previous slide that sponsors' main task during project design is to establish connections with local partners. However, we can't easily report on the successes or challenges of partnerships with non-Rotary entities, or on what these entities contribute during or after a global grant project, because there has been confusion about how we define *partners* and what data we collect and report.

On the grant application, under "Step 7 — Participants," there's a space for "Partners" to be listed after "Cooperating Organizations" and before "Volunteer Travelers." All three are optional to complete. The descriptor for partners reads: "Partners may include other Rotary clubs, Rotaract clubs, Rotary Community Corps, or individuals." The descriptor for cooperating organizations reads: "A cooperating organization can be a nongovernmental organization, community group, or government entity," and applicants may or may not provide information about the name, website, location, and role of the cooperating organization in the project. The descriptor for volunteer travelers reads: "A grant for a humanitarian project can pay for travel for up to two people who will provide training or help implement the project if the necessary skills are not available locally." Also, partners are not listed in "Step 9 — Funding," where cash contributions or DDF contributors are to be listed.

Rotary's most accurate and easily available data about partners relates to collaborations between Rotary or Rotaract clubs and districts. We also collect and have updated contact information for partners on global grant projects that are Rotary entities, such as Rotary Action Groups and other groups within Rotary. Rotary requires annual reports from action group chairs, which summarize their impact on Rotary projects. However, we often do not have valid contact information for partners that are non-Rotary entities, such as community groups, governments, or beneficiaries.

Also, when we reviewed reports with aggregated data on cooperating organizations, we noticed that the information is incorrect. For example, Project C.U.R.E., which provides refurbished equipment to Rotary project beneficiaries, was found to be a cooperating organization for only 15 medical equipment projects. According to global grants staff, the aggregated data reports are incorrect. Rotary's data collection and reporting structure needs to be improved before the Grant Model Evaluation team can accurately assess these additional partnerships, including the funds and expertise they provide during and after the project, and for how long. This was shared with our Product team, which is reviewing Rotary's grants and service data structure. Rotary needs to gather service and grant data in a more structured manner and enhance the quality of this data.

During sustainability site visits, Cadre members noted that Rotary also needs to establish guidelines on how long partnerships should fund equipment maintenance, accounting for product life cycles, and when a repeat project should occur to replace equipment. Consider this comment from a host sponsor: "E-learning projects can be sustained only for 3-5 years as the hardware requires degradation or replacement and secondly the curriculum needs to be updated." Also, repeated projects can't be easily identified in data reports. Global grant numbers are newly generated for each application. Applicants can't easily indicate (through a check box, for example) if a new project is a repeat of a previous one, and they can't easily select the previous project's global grant number (from a drop-down menu, for example) to record relationships between multiple grant projects.

ALIGNING PROJECT ACTIVITIES WITH ROTARY'S AREAS OF FOCUS

- In 2023, **only seven applicants of approved grants** selected "aligning project activities with Rotary's areas of focus" as the **most challenging** part of the grant process.

- **None of the applicants of declined grants** selected "aligning project activities with Rotary's areas of focus" as the **most challenging** part of the grant process.

- One applicant of a declined application specified in comments:

  "For new Environmental AOF the guidance

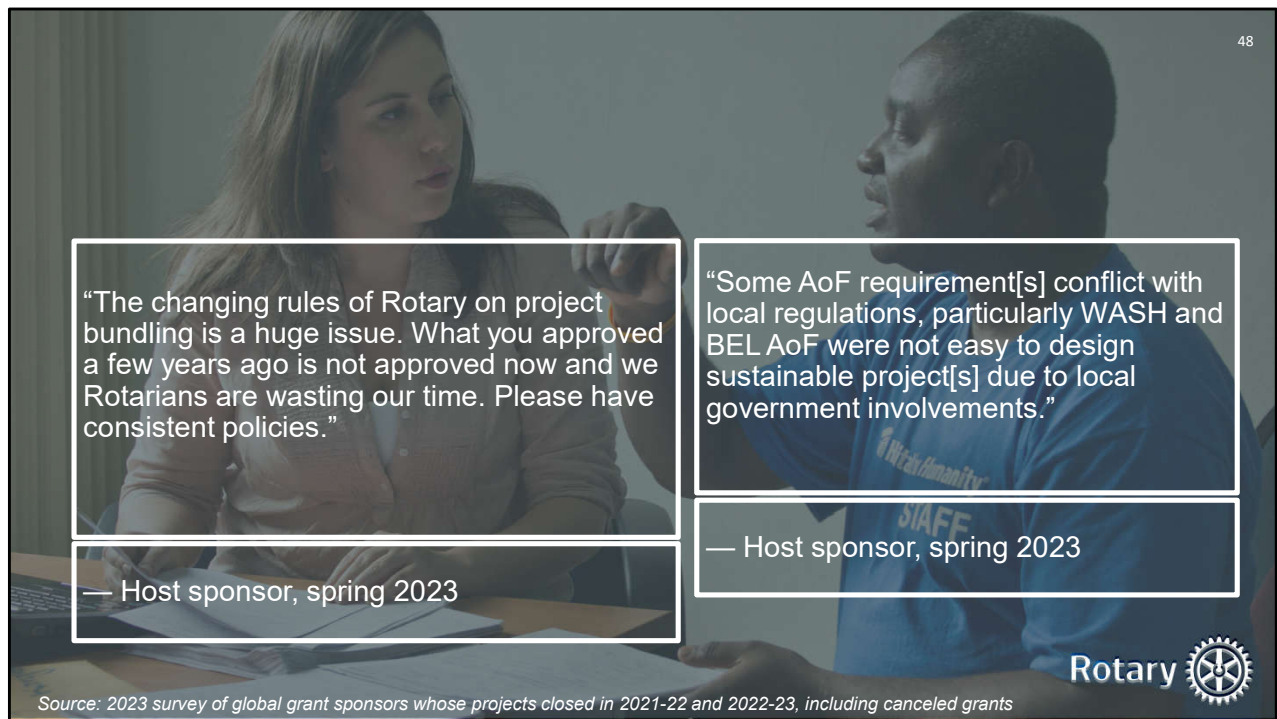 was emerging, so missed the mark."

Source: 2022 & 2023 Global Grant Applicant Surveys

On slide 30, in the Monitoring and Evaluation Data section, we examined the primary goals and achievement of each goal within six areas of focus. (We noted that we had not yet received enough responses from sponsors of projects supporting the environment.) We saw that most sponsors reported achieving their goals.

According to our surveys of applicants of approved and declined grants, aligning project activities with Rotary's areas of focus has not been a challenge. In fact, this year only seven applicants reported it being a challenge.

In our 2023 district chair survey, district Rotary Foundation chairs and district international service chairs also reported that aligning project activities with the areas of focus is the least difficult task for members: 40% of chairs said it is not at all difficult, and only 3% said it is extremely or very difficult.

"The changing rules of Rotary on project bundling is a huge issue. What you approved a few years ago is not approved now and we Rotarians are wasting our time. Please have consistent policies."

— Host sponsor, spring 2023

"Some AoF requirement[s] conflict with local regulations, particularly WASH and BEL AoF were not easy to design sustainable project[s] due to local government involvements."

— Host sponsor, spring 2023

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

Only a few sponsors said that aligning their project activities with Rotary's areas of focus was challenging.

SUMMARY: FEW APPLICANTS REPORT CHALLENGES, WHICH DIFFER FOR APPROVED AND DECLINED GRANTS

Top 2 Challenges for Applicants, 2021-22	
Approved Grants	**Declined Grants**
Securing funding (19%)	Conducting a community assessment (16%)
Identifying an international partner (17%)	Aligning proposed activities with Rotary's areas of focus (14%)
Top 2 Challenges for Applicants, 2022-23*	
Approved Grants	**Declined Grants**
Securing funding (23%)	Incorporating sustainability (22%)
Incorporating M&E benchmarks (12%)	(too few respondents to identify another top challenge)

*additional responses collected from 2022-23 applicants past August 2023 are not ncluded
Source: 2022 & 2023 Global Grant Applicant Surveys

Few grant applicants reported challenges in 2022 and 2023, regardless of whether their application was approved or declined. Approved applicants found it most challenging to secure funding, identify partners, and incorporate monitoring and evaluation (M&E) benchmarks, whereas declined applicants found it most challenging to conduct community assessments, align project activities with our areas of focus, and incorporate sustainability.

For approved applicants, Rotary assists with start-up challenges, such as assembling their teams and making preparations. We provide the necessary support, resources, and additional programs.

Declined applicants can either complete more training before they apply again for a global grant or, if their project activities don't align with global grant requirements, seek funding from district grants.

SUMMARY: MOST SPONSORS FOUND CHALLENGES 'NOT DIFFICULT' TO OVERCOME

Raising funds for required contributions:

- 46% found it neither difficult nor easy
- 38% found it easy or very easy

Conducting community assessments:

- 53% found it neither difficult nor easy
- 28% found it easy or very easy

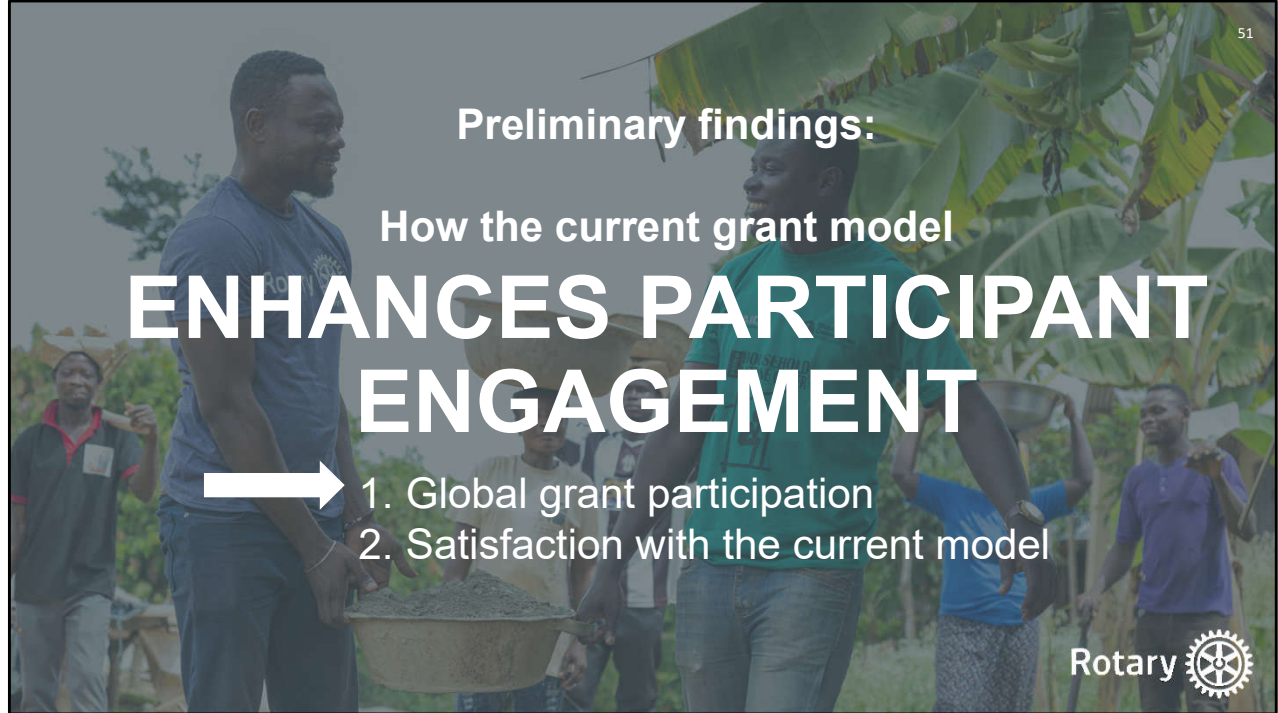**Finding sponsors to partner with on projects:**

- 36% found it neither difficult nor easy
- 41% found it easy or very easy

Designing sustainable project activities:

- 41% found it neither difficult nor easy
- 39% found it easy or very easy

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

Most sponsors (78%-84%) said it wasn't difficult to overcome the previously identified challenges of securing funding, finding partners, conducting community assessments, and designing sustainable projects by aligning their activities with Rotary's areas of focus.

Preliminary findings:

How the current grant model

ENHANCES PARTICIPANT ENGAGEMENT

1. Global grant participation
2. Satisfaction with the current model

We explored how our current model enables or hinders Rotary members' participation in Rotary grants.

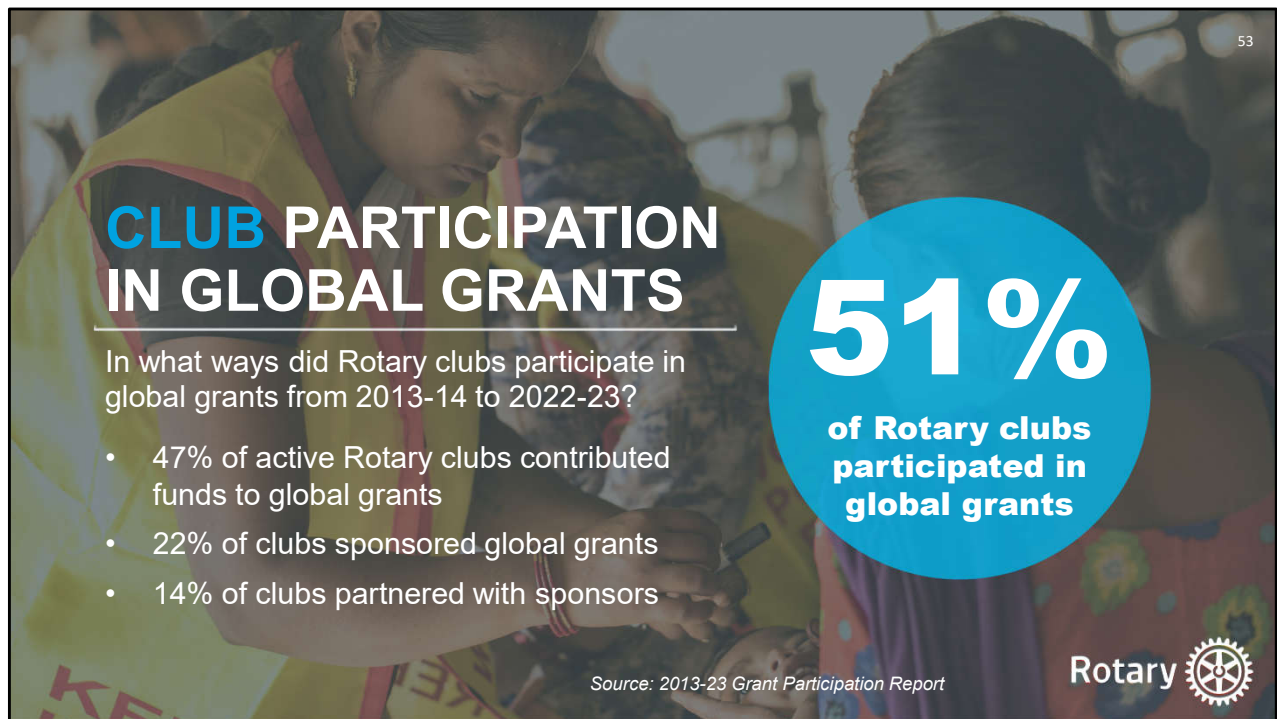Here are the evaluation questions for this section:
- Which clubs participate in global grants, and does the current model enable or block member engagement in grants?
- How many clubs are participating in global grants?
- How many members are participating in global grant projects?
- Are there barriers to participating in global grants? If there are any barriers, can they be overcome?

SUMMARY OF PARTICIPATION FINDINGS

1. **51% of clubs** active in the past 10 years have participated in global grants in some form (*2013-23 Grant Participation Report*)
2. **19% of members participated in global grants** in the past year (*2023 Programs & Offerings Survey*)
3. **87%** of applicants in the past two years **intend to apply again** for a global grant (*2023 Global Grant Applicant Surveys*)
4. **75%** of clubs don't participate in global grants because they focus on other service projects (*2023 Programs & Offerings Survey*)
5. **>80%** of sponsors say that the top **challenge** for applicants with approved applications (securing funding) and declined applications (incorporating sustainability) are **not difficult to overcome** (*2023 Global Grant Applicant Surveys, 2023 Global Grant Sponsor Survey*)
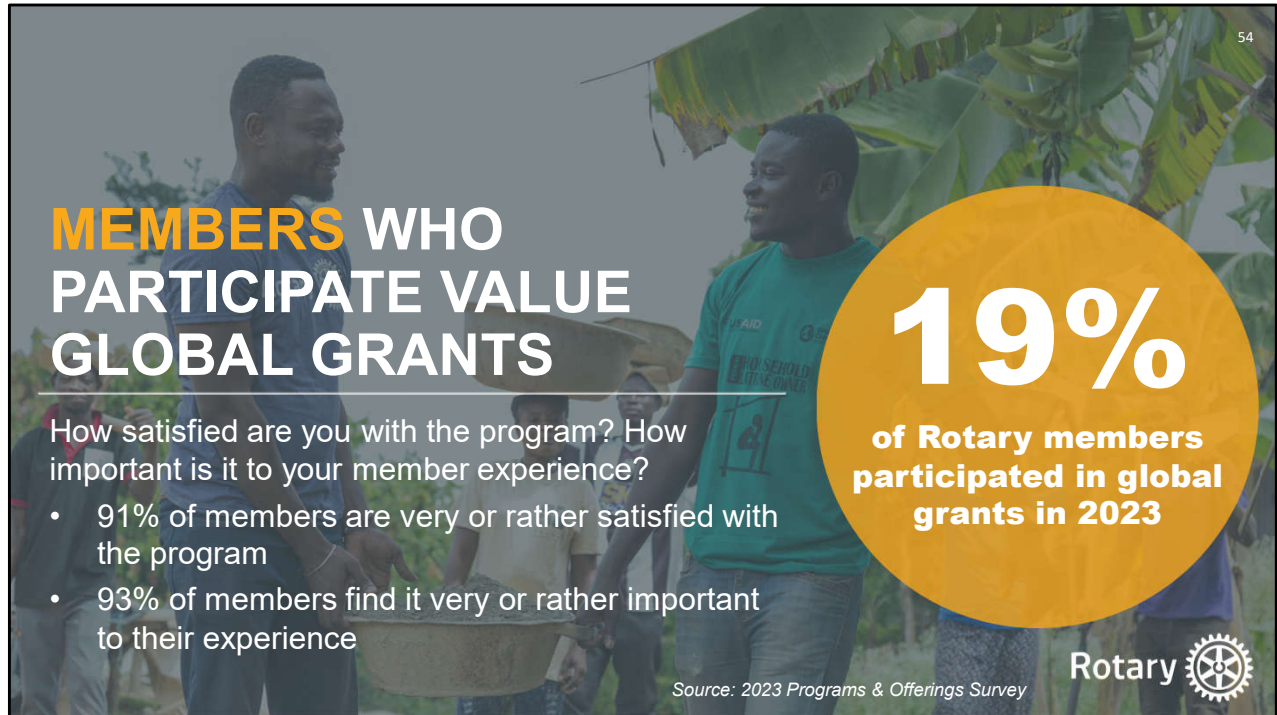
We examined data from grant applications and reports alongside results from multiple surveys of different stakeholders:

1. The Grant Participation Report shows us that slightly more than half of Rotary clubs active in 2013 through 2023 have participated in global grants in some form.
2. From the 2023 Rotary Programs and Offerings Survey, we found that 19% of members participated in global grants in 2022-23.
3. The Global Grant Applicant Surveys show us the perceived ease of the application process and members' willingness to participate in it again, regardless of application approval.
4. Three-quarters of clubs don't participate in global grants because they focus on other service projects.
5. Applicants said that securing funding and incorporating sustainability were top challenges. However, the Global Grant Sponsor Survey, which we use to evaluate the overall experience of host and international sponsors, showed that those challenges are not difficult to overcome.

CLUB PARTICIPATION IN GLOBAL GRANTS

In what ways did Rotary clubs participate in global grants from 2013-14 to 2022-23?

- 47% of active Rotary clubs contributed funds to global grants
- 22% of clubs sponsored global grants
- 14% of clubs partnered with sponsors

51%

of Rotary clubs participated in global grants

Source: 2013-23 Grant Participation Report

Rotary

To learn more about club engagement in global grants, our team examined how many clubs participate in global grants in some way. We used the Grant Participation Report and a list of Rotary clubs active from 2013-14 to 2022-23. The report keeps track of the clubs that have contributed funds to a project, sponsored a grant, and partnered with a grant sponsor. **Of the current active Rotary clubs, slightly more than half participated in global grants in some way.** We found that 47% contributed funds to global grants, 22% sponsored global grants, and 14% partnered with sponsors.

Please note that sponsor clubs were counted only once, even if they were host or international sponsors of multiple global grant projects. However, contributing and sponsor clubs may overlap, since clubs that sponsor a global grant project may also contribute funds to other projects. Also note that in the global grant application, applicants identify "partners" who are not sponsors of the project. We used this information to identify Rotary clubs that partner with sponsors on global grant projects. Only Rotary clubs active from 2013-14 to 2022-23 were included in this analysis, and each counted once in the overall 51% of clubs that participated in global grants.

MEMBERS WHO PARTICIPATE VALUE GLOBAL GRANTS

How satisfied are you with the program? How important is it to your member experience?

- 91% of members are very or rather satisfied with the program
- 93% of members find it very or rather important to their experience

19% of Rotary members participated in global grants in 2023

Source: 2023 Programs & Offerings Survey

Rotary

The annual Programs & Offerings Survey provides an estimate of how many members are participating in global grants. Of the highly engaged members who responded to the 2023 survey, nearly one-fifth said they have participated in the global grants program.

Of the 19% who have participated in global grants, 93% said the program is important to their member experience (64% very and 28% rather important) and 91% were satisfied with the program (51% very and 40% rather satisfied).

TOP REASON FOR NOT PARTICIPATING IN GLOBAL GRANTS: FOCUS ON OTHER SERVICE PROJECTS

Why is your club not interested in participating in a global grant?

Reason	Percentage
Our club is focused on other service projects (N=3125, AvgCI=+/-1.4%)	68.1%
Our club is interested, but global grants have too many requirements (N=3071, AvgCI=+/-1.6%)	53.6%
Our club is interested, but it is difficult to raise the necessary funds (N=3106, AvgCI=+/-1.6%)	52.7%
Our club is interested, but it is difficult to find partners (N=3077, AvgCI=+/-1.6%)	48.8%
Our club is not interested in global grants (N=3058, AvgCI=+/-1.6%)	17.2%

Source: 2022 Rotary Leadership Survey
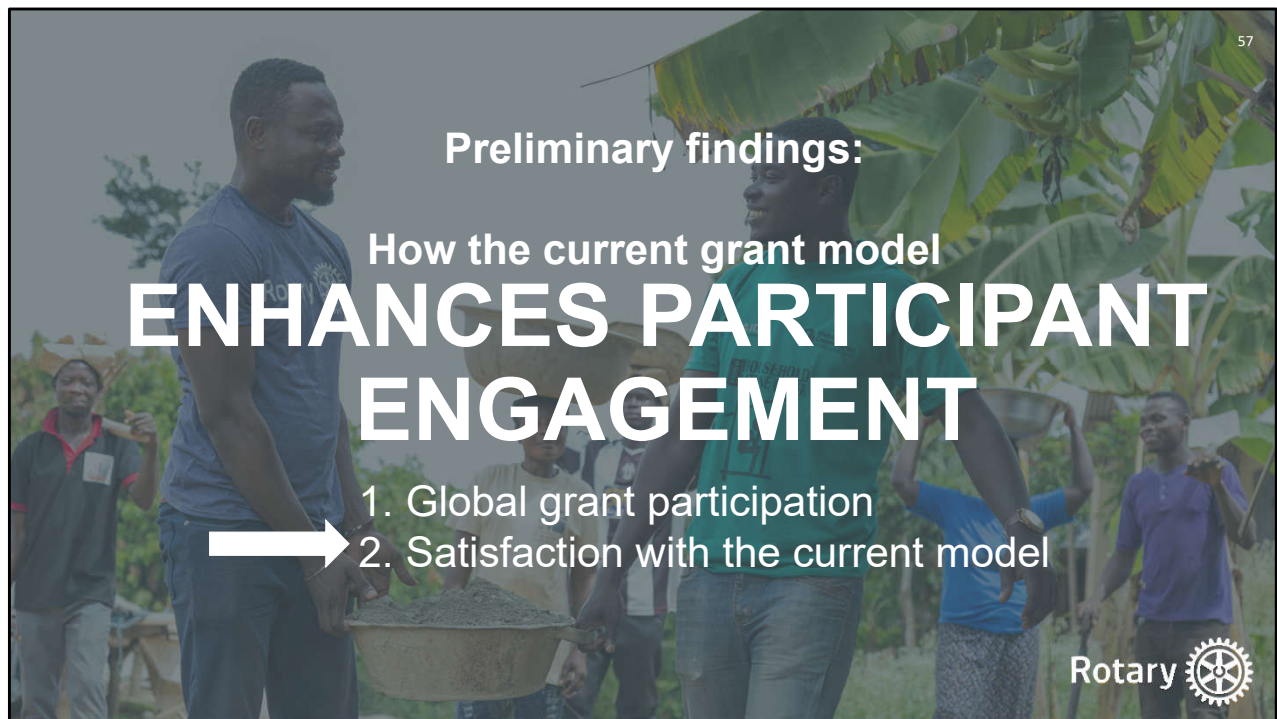
The most common reason for not participating in global grants, according to presidents of clubs that have not sponsored a grant, is a focus on other types of service. However, about half reported that global grant requirements are a barrier to entry. As explained on slide 51, applicants have identified several requirements they've found challenging: securing funding, identifying partners, incorporating monitoring and evaluation benchmarks, conducting community assessments, aligning project activities with our areas of focus, and incorporating sustainability. As shown on slide 52, sponsors report that these challenges are not difficult to overcome. Note that sponsors attend training and use a variety of resources to overcome challenges.

Preliminary findings:

How the current grant model
ENHANCES PARTICIPANT ENGAGEMENT

1. Global grant participation
2. Satisfaction with the current model

How satisfied are members with Rotary's program offerings, including global grants? We explored the satisfaction level of global grant participants — including applicants of approved and declined grants, as well as sponsors of closed grants — with the grants process and with the program overall.

Here are the evaluation questions for this section:

- How important is the global grants program to our members?

- What is our members' impression of the global grants program?

- Are members dissatisfied or satisfied with the program and their participation in it?

- What do members want from their participation in grant-funded projects?
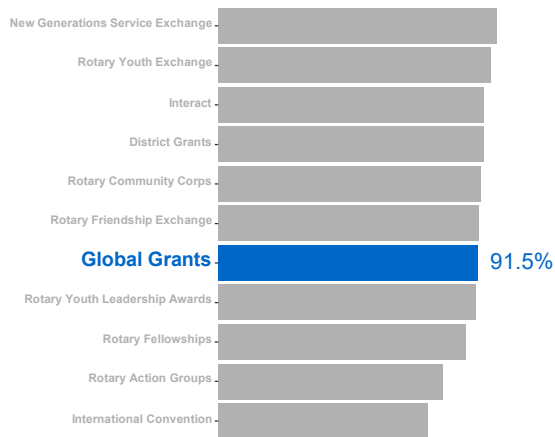
SUMMARY OF SATISFACTION FINDINGS

1) **More than 90%** of members think **global grants are important to their member experience.** *(2023 Programs & Offerings Survey)*

2) **More than 80%** of sponsors **have excellent or very good impressions** of global grants. *(2023 Global Grant Sponsor Survey)*

3) **The majority** of members (91%), applicants of approved grants (87%), and sponsors of closed grants (86%) **are satisfied** with global grants. *(2023 Programs & Offerings Survey, 2023 Survey to Applicants, and 2023 Global Grant Sponsor Survey)*

4) **Most prefer long-term, sustainable service projects** that address poverty and inequity. *(2023 Global Grant Sponsor Survey)*

We examined data from grant applications and reports alongside results from multiple surveys of different stakeholders:

1. In surveys sent to sponsors of closed projects and to applicants with approved and declined grant applications, we see similar satisfaction rates of 80%. These rates were also evident in the annual all-member surveys. In the 2023 Global Grant Sponsor Survey, we found that 86% of host and international sponsors whose grants closed in 2021-22 and 2022-23 are very or extremely satisfied, and that 91% of host sponsors are very or extremely satisfied compared with 82% of international sponsors.
2. Most sponsors of global grant projects prefer long-term, sustainable service projects that address poverty and inequity rather than emergency needs.

IMPORTANCE & SATISFACTION LEVELS FOR GLOBAL GRANTS COMPARED WITH OTHER ROTARY OFFERINGS

Which programs and offerings are important to members?

- New Generations Service Exchange
- Rotary Youth Exchange
- Interact
- District Grants
- Rotary Community Corps
- Rotary Friendship Exchange
- **Global Grants** — 91.5%
- Rotary Youth Leadership Awards
- Rotary Fellowships
- Rotary Action Groups
- International Convention

How satisfied are members with Rotary programs and offerings?

- Rotary Youth Exchange
- New Generations Service Exchange
- Rotary Friendship Exchange
- Rotary Community Corps
- District Grants
- **Global Grants** — 90.6%
- Rotary Youth Leadership Awards
- Rotary Fellowships
- Interact
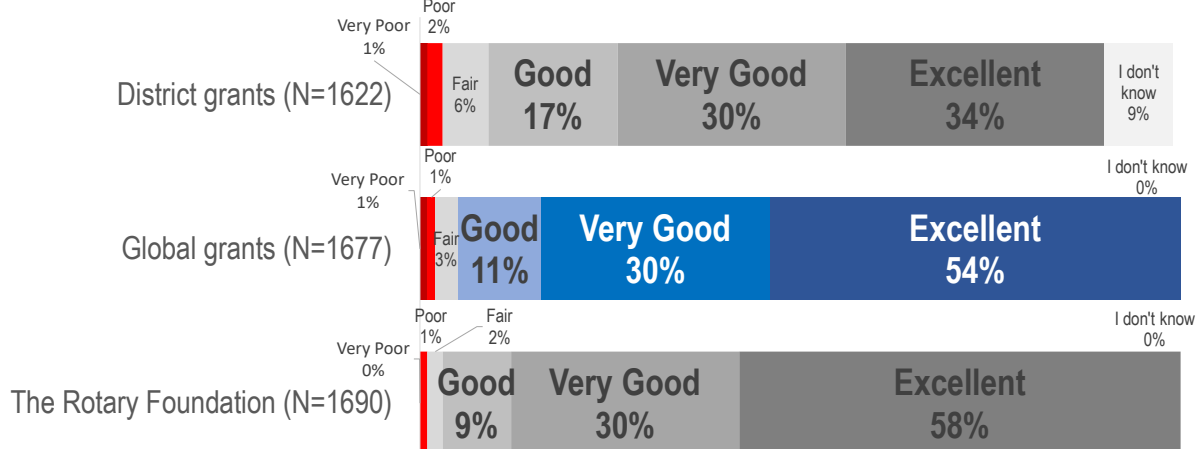- Rotary Action Groups
- International Convention

Source: 2023 Rotary Programs & Offerings Survey

According to the 2023 Rotary Programs and Offerings Survey, 92% of members think global grants are important to their member experience. Almost all (91%) are satisfied with their participation in global grants. (Over 50% were very satisfied.)

SPONSORS HAVE AN EXCELLENT OR VERY GOOD IMPRESSION OF GLOBAL GRANTS, MORE SO THAN OF DISTRICT GRANTS

What are your overall impressions of the following?

District grants (N=1622)
Very Poor 1% | Poor 2% | Fair 6% | Good 17% | Very Good 30% | Excellent 34% | I don't know 9%

Global grants (N=1677)
Very Poor 1% | Poor 1% | Fair 3% | Good 11% | Very Good 30% | Excellent 54% | I don't know 0%

The Rotary Foundation (N=1690)
Very Poor 0% | Poor 1% | Fair 2% | Good 9% | Very Good 30% | Excellent 58% | I don't know 0%
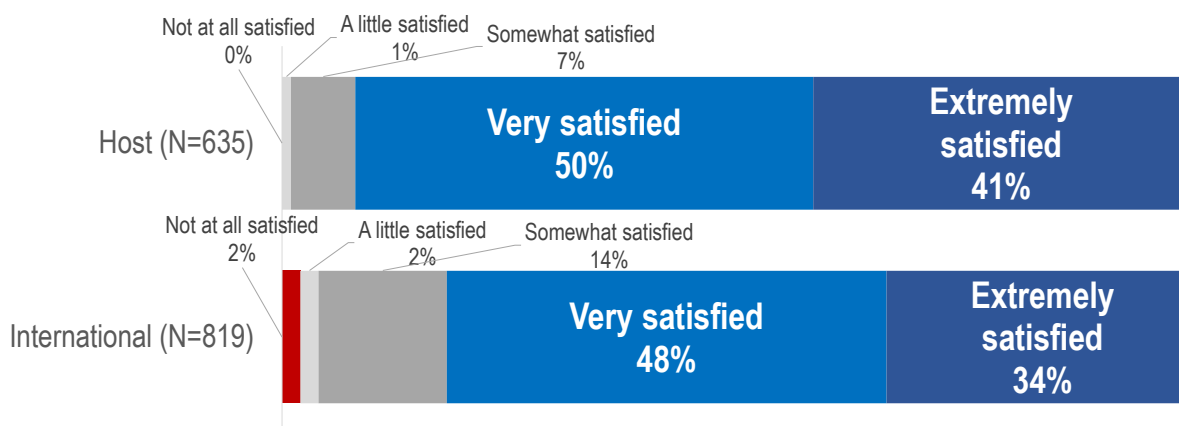
Source: 2023 Global Grant Sponsor Survey

Overall, 84% of sponsors of closed grants had an excellent or very good impression of global grants compared with district grants (64%). Their overall impression of The Rotary Foundation was almost equally positive (88%).

SPONSORS OF GLOBAL GRANT PROJECTS ARE SATISFIED WITH GLOBAL GRANTS

Overall, how satisfied are you with your participation in global grants?

Source: 2023 Global Grant Sponsor Survey

As we consider the findings from the annual member surveys alongside other survey data, we again see high satisfaction rates and very good impressions of global grants among sponsors of projects that closed 2021-23.

Overall, 86% of sponsors of closed grants were extremely (37%) or very satisfied (49%) with their participation when surveyed in 2023. However, when we look at satisfaction by type of sponsor, we see that more host sponsors (91%) and fewer international sponsors (82%) are extremely or very satisfied with their participation in global grants.

MOST APPLICANTS ARE SATISFIED WITH THEIR OVERALL APPLICATION EXPERIENCE

	Applicants strongly/somewhat agree	
I am satisfied with …	**Approved grants**	**Declined grants**
My overall global grants application experience	87%	46%
The global grant online application	92%	55%
The overall speed of the application process	77%	64%

Source: 2023 Global Grant Applicant Surveys

Let's look at the aspects of satisfaction with the global grant application process, and how different types of applicants feel about it.

As expected, we see a difference in the satisfaction of those whose applications were approved versus those whose were declined. We see a pronounced difference in satisfaction with the overall application experience and the online application; only half of those who had their applications declined strongly or somewhat agreed with being satisfied. However, most applicants were satisfied with the speed of the application process, even those who had their applications declined.

MOST APPLICANTS FELT SUPPORTED DURING THE APPLICATION PROCESS, AND FOUND IT TO BE TRANSPARENT AND EASILY UNDERSTOOD

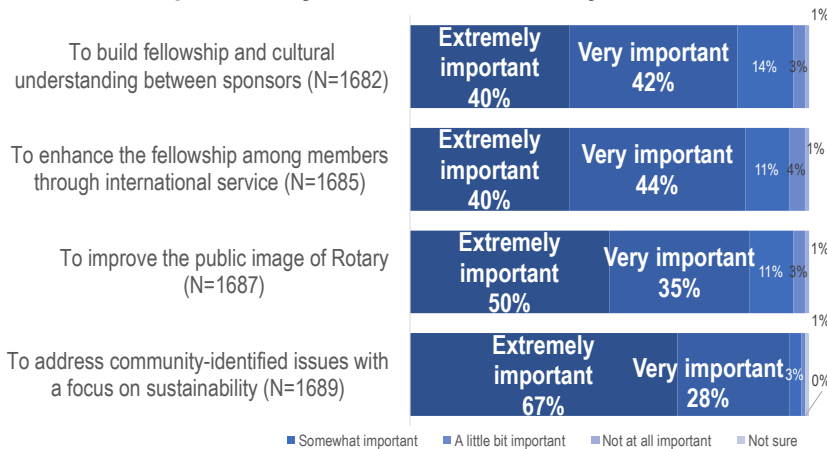| I felt …	Applicants strongly/ somewhat agree	
	Approved grants	Declined grants
Supported throughout the application process	84%	73%
The process to be transparent — I knew what was required and the status of the application	81%	46%
The global grant application process is easy to understand	71%	56%

Source: 2023 Global Grant Applicant Surveys

Even though only half of the declined applicants reported being satisfied with the application process, they understood the process and felt supported.

In the earlier section about participation, we learned that global grant requirements may prohibit clubs from participating in the program. Here, we see that only half of declined grant applicants felt they knew the global grant requirements and the status of their application. This may reflect a need to communicate with and train applicants who have been declined.

Notably, 232 declined applicants, including potential host and international sponsors, were asked to participate in the 2023 Global Grant Applicant Surveys. The response rate for the declined applicants was very low, which could skew the results and make the data less reliable.

MOST PREFER LONG-TERM, SUSTAINABLE GLOBAL GRANT PROJECTS THAT ADDRESS POVERTY AND INEQUITY RATHER THAN EMERGENCY NEEDS

Here are some of the objectives of global grants. How important to you is each of these objectives?

To build fellowship and cultural understanding between sponsors (N=1682): Extremely important 40%, Very important 42%, 14%, 3%, 1%

To enhance the fellowship among members through international service (N=1685): Extremely important 40%, Very important 44%, 11%, 4%, 1%

To improve the public image of Rotary (N=1687): Extremely important 50%, Very important 35%, 11%, 3%, 1%

To address community-identified issues with a focus on sustainability (N=1689): Extremely important 67%, Very important 28%, 3%, 0%, 1%

■ Somewhat important ■ A little bit important ■ Not at all important ■ Not sure

- **75%** prefer to address poverty and inequity rather than an emergency need
- **55%** prefer long-term club involvement in global grant projects
- **46%** prefer to sponsor a global grant project that provides goods or services
- **43%** prefer a project that provides training and/or transfer of knowledge

Source: 2023 Global Grant Sponsor Survey

When asked about global grant objectives:

- 95% of sponsors say the objective to address community-identified issues with a focus on sustainability is extremely (67%) or very important (28%) to them. This objective is more important to them than to improve the public image of Rotary, to build fellowship and cultural understanding between sponsors, or to enhance the fellowship among members through international service.

- 75% of sponsors prefer to sponsor a project that addresses poverty and inequity in a country, whereas 14% prefer one that addresses an emergency need and 11% aren't sure.

- 55% of sponsors prefer long-term club involvement (three years or more) in global grant projects, whereas 34% prefer short-term involvement (less than one year) and 11% aren't sure.

- 46% of sponsors prefer to sponsor a global grant project that provides goods (such as distribution of medical equipment) or services (such as provision of surgery), whereas 43% prefer a project that provides training and/or transfer of knowledge (such as a training for teachers or nurses) and 11% aren't sure.
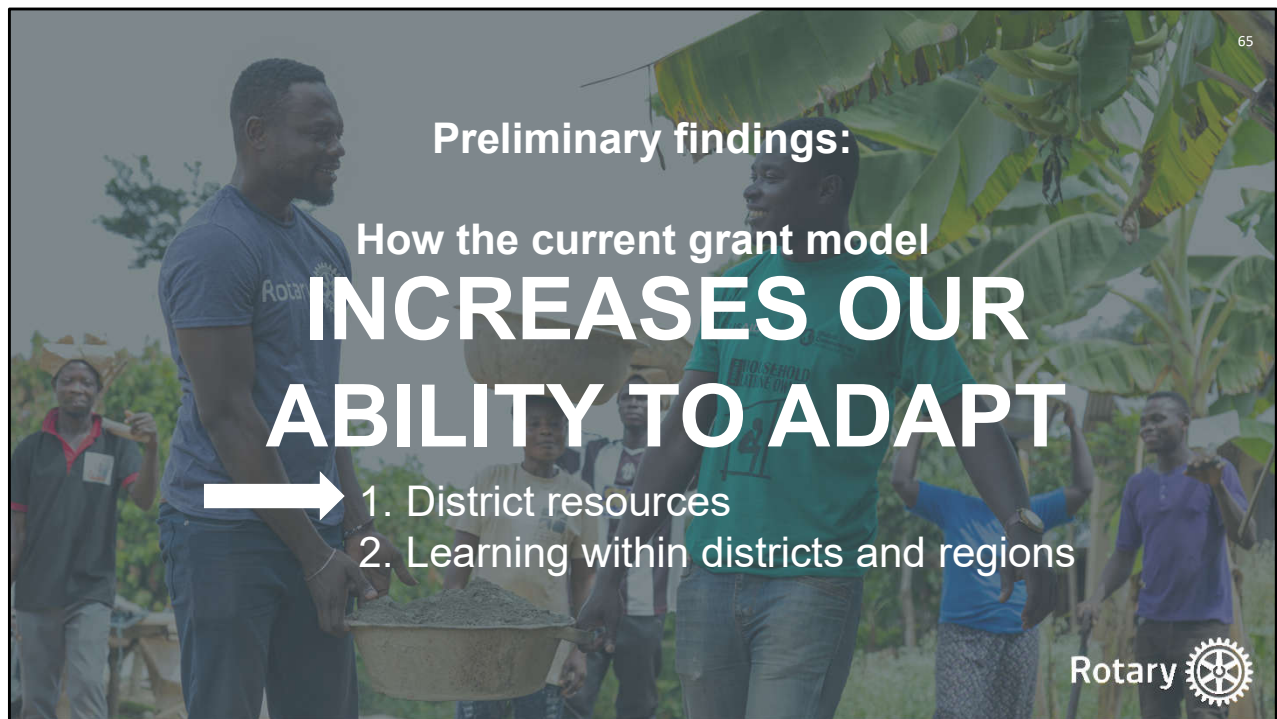
Preliminary findings:

How the current grant model
INCREASES OUR ABILITY TO ADAPT
1. District resources
2. Learning within districts and regions

Rotary
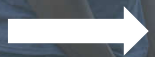
We explored questions related to district engagement in the global grant process:

- What district resources are available to members who want to or are applying for and sponsoring a global grant project?

- Are grant applicants and sponsors working with district chairs to connect with experts for project design, including during the application process and project implementation?

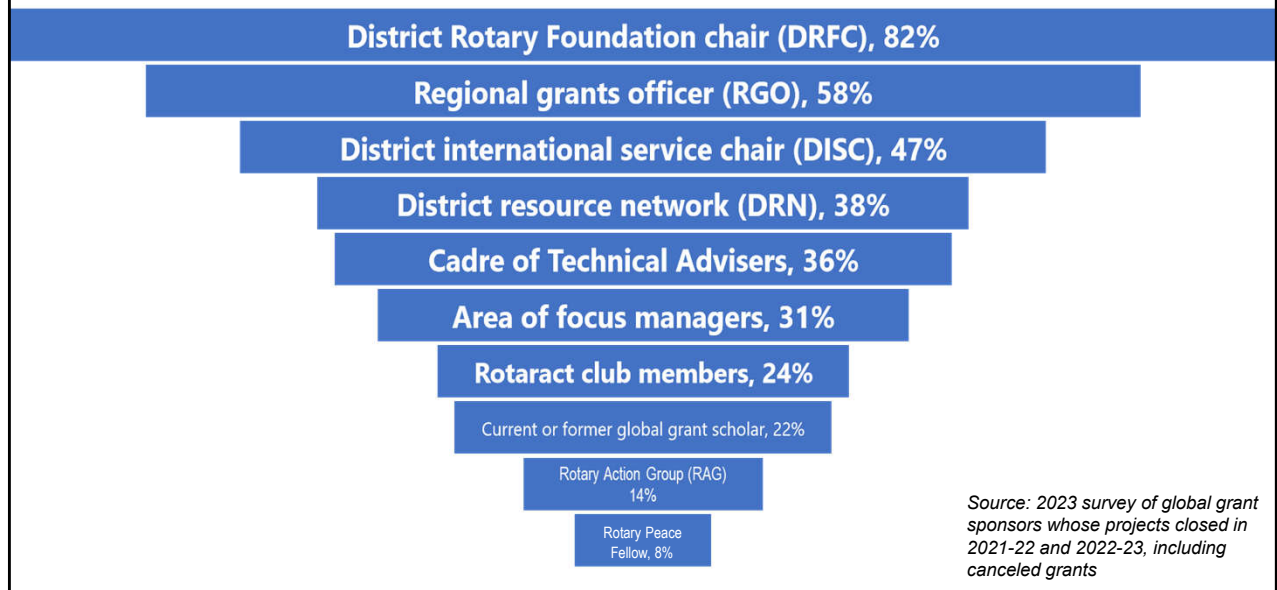- Is the result meeting the intent of the district resource network (DRN)?

SUMMARY OF FINDINGS FOR DISTRICT RESOURCES IN GLOBAL GRANTS

1. **82% of sponsors contacted** their **DRFC, 47%** their **DISC,** and **38%** their **DRN** with questions about their global grant projects mainly during project design and less during implementation (*2023 Global Grant Sponsor Survey*)

2. **43% of applicants collaborated** with their **DRFC on grant applications,** followed by **20% who worked with** their **district international service committee and DRN** (*2023 Applicant Survey — Approved Grants*)

3. **45% of district chairs** report that their **districts have a DRN — a total of 175 districts** (*2023 District Chair Survey*)

4. **>90% of district chairs** report **DRN benefits,** including helping early with project design, improving grant applications through guidance on impact and sustainability, overcoming fear and burdens, and sharing knowledge in the district about projects (*2023 District Chair Survey*)

5. **46% of district chairs** report that their districts **don't have a database** that identifies an existing team of experts; sponsors say that experts' contact information would help make district seminar sessions on finding subject matter experts more useful (*2023 District Chair Survey and 2023 Global Grant Sponsor Survey*)

Did you consult any of the following people or groups during your work on [Field-Grant%20Title]?

- District Rotary Foundation chair (DRFC), 82%
- Regional grants officer (RGO), 58%
- District international service chair (DISC), 47%
- District resource network (DRN), 38%
- Cadre of Technical Advisers, 36%
- Area of focus managers, 31%
- Rotaract club members, 24%
- Current or former global grant scholar, 22%
- Rotary Action Group (RAG) 14%
- Rotary Peace Fellow, 8%

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants
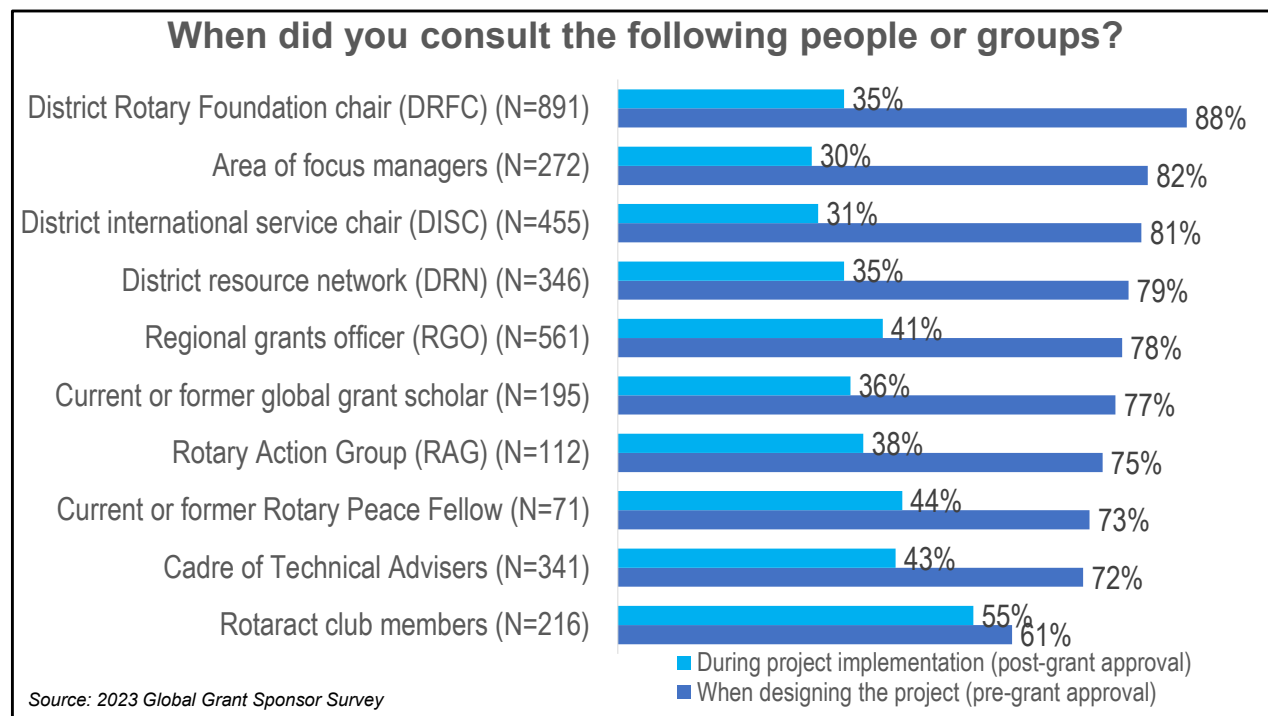
Most sponsors said they sought help during their projects from their district Rotary Foundation chairs (82%). Many also highlighted resources that may not exist in every district. (In 2023, for example, 403 districts, or 76%, had a DISC appointed, and 175 districts, or 33%, reported having a district resource network.) In our 2023 survey of global grant sponsors, 47% of sponsors said they contacted their district international service chair, and 38% contacted their district resource network, for help with global grant projects. These findings are similar to the results of our 2023 survey of applicants of approved grants: 43% of applicants collaborated with their DRFC on grant applications, followed by 20% who worked with their district international service committees and district resource networks. (We received too few responses from applicants of declined grants to draw any conclusions.)

Note that members of the Cadre of Technical Advisers, Rotaract club members, global grant scholars, Rotary Action Group members, and Rotary Peace Fellows may be part of the district resource networks.

In our 2023 survey of district chairs, we asked, "Are the following types of experts included in your district resource network?" Respondents selected "yes" mainly for Rotary members with previous project experience (97%), Cadre members (72%), and Rotary Action Group members (52%). Less than half but more than one-third of district chairs selected "yes" for non-Rotary professionals from the community (48%), alumni (43%), Rotaract members with previous project experience (37%), and intercountry committee members (32%). About a quarter of district chairs reported that Rotary Peace Fellows (27%) and Rotary Community Corps members (25%) are included in their district's team of experts.

We also asked district chairs to identify who in their district is mainly responsible for the global grant review process. Most indicated district Rotary Foundation chairs (87%),

district grants subcommittee chairs (82%), and stewardship subcommittee chairs (59%). Notably, 52% of district chairs said that district international service chairs are not involved; in fact, 10% of districts didn't have anyone appointed to this role, according to our survey. When district international service chairs are involved in the global grant review process, their main responsibilities are to connect clubs with resources to improve international service projects (77%) and serve as the main contact for the district's network of experts, whom clubs can consult to improve projects and grant applications (69%).

When did you consult the following people or groups?

Group	During project implementation (post-grant approval)	When designing the project (pre-grant approval)
District Rotary Foundation chair (DRFC) (N=891)	35%	88%
Area of focus managers (N=272)	30%	82%
District international service chair (DISC) (N=455)	31%	81%
District resource network (DRN) (N=346)	35%	79%
Regional grants officer (RGO) (N=561)	41%	78%
Current or former global grant scholar (N=195)	36%	77%
Rotary Action Group (RAG) (N=112)	38%	75%
Current or former Rotary Peace Fellow (N=71)	44%	73%
Cadre of Technical Advisers (N=341)	43%	72%
Rotaract club members (N=216)	55%	61%

■ During project implementation (post-grant approval)
■ When designing the project (pre-grant approval)

Source: 2023 Global Grant Sponsor Survey

Sponsors said they consult resources mainly during the project design phase rather than during implementation. However, more than half of sponsors reported consulting Rotaract members during project implementation.

SUMMARY OF FINDINGS ABOUT DISTRICT RESOURCE NETWORKS

175 districts have a district resource network, and 36 more districts have plans to establish one

Top benefits of district resource networks:
- Early planning
- Overcoming fear of international projects or global grants
- Grant applications
- Guidance on impact and sustainability
- Knowledge sharing in the district about projects and grants
- Project design
- Speed in grants approval
- Ease of administrative burden
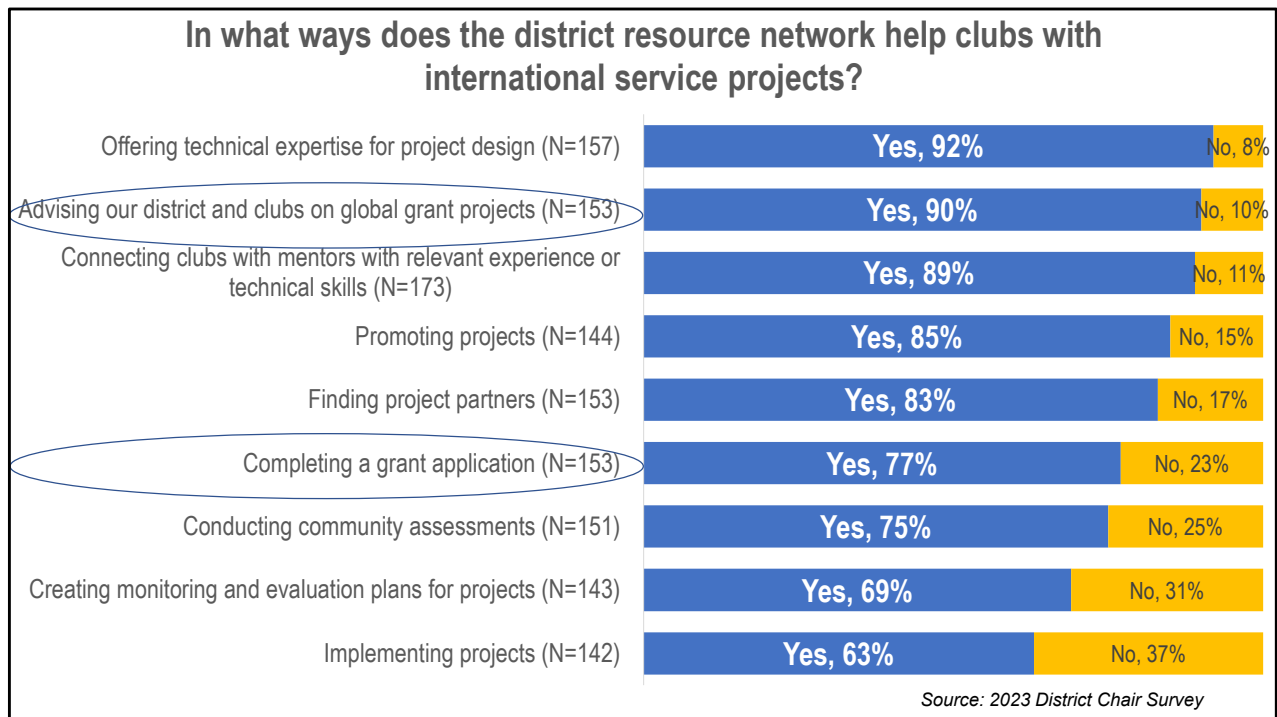
Source: 2023 District Chair Survey

In our 2023 survey of DRFCs and DISCs:

- 45% of chairs selected "yes" when asked if their districts have a district resource network (DRN) — a team of experts who mentor and support clubs with projects of all types, including those funded by the Foundation (global grants), by district grants, and by entities outside of Rotary (other types of clubs and districts, private foundations, or community or business organizations). Counting districts only once, even when both the DRFC and DISC responded "yes," we found that 175 districts have a DRN.

- 31% of chairs reported plans to establish a district resource network. Counting districts only once, even when both the DRFC and DISC responded "yes," we found that 36 additional districts plan to establish a DRN.

What are the benefits of a district resource network? District chairs said the top benefits are:

1. Mentoring clubs early in the planning process (96%) and helping clubs overcome fear of international projects or global grants (96%)
2. Improving grant applications (94%) and providing guidance on impact and sustainability (94%)
3. Making district members feel more connected to what's happening with projects and grants (91%)
4. Improving project design (90%)
5. Increasing the speed with which The Rotary Foundation approves grants (80%)
6. Easing administrative burdens (69%)

We can see how district resource networks can help districts overcome many perceived burdens and barriers to global grants, and increase both participation and impact by helping clubs and districts adapt.

In what ways does the district resource network help clubs with international service projects?

Offering technical expertise for project design (N=157)	Yes, 92%	No, 8%
Advising our district and clubs on global grant projects (N=153)	Yes, 90%	No, 10%
Connecting clubs with mentors with relevant experience or technical skills (N=173)	Yes, 89%	No, 11%
Promoting projects (N=144)	Yes, 85%	No, 15%
Finding project partners (N=153)	Yes, 83%	No, 17%
Completing a grant application (N=153)	Yes, 77%	No, 23%
Conducting community assessments (N=151)	Yes, 75%	No, 25%
Creating monitoring and evaluation plans for projects (N=143)	Yes, 69%	No, 31%
Implementing projects (N=142)	Yes, 63%	No, 37%

Source: 2023 District Chair Survey

Again, we see that district resource networks are used more during project design (92%) than during implementation (63%). As the previous slide shows, the top benefits of DRNs, according to district chairs, are mentoring clubs early in the planning process and helping them overcome a fear of international projects or global grants.

In our 2023 survey of district chairs, 90% of chairs reported that DRNs advise the district and clubs on global grant projects, and 77% said that DRNs help complete grant applications. Notably, in our 2023 survey of applicants of approved grants, 20% of respondents said they worked with their district international service committee and DRN on their grant applications.

District chairs also reported that DRNs help with some global grant requirements: finding project partners (83%), conducting community assessments (75%), and creating monitoring and evaluation plans for projects (69%).

DISTRICT TRAINING IS ESSENTIAL TO PROMOTING DISTRICT RESOURCES TO GLOBAL GRANT APPLICANTS

1. **81%** of sponsors **participated in grant management seminars,** mainly in person

2. **92%** of sponsors received **training at district seminars,** and **42%** through the **Learning Center**

3. **5%** reported that **finding subject matter experts wasn't a topic** covered during their district training, and **17% didn't find this topic useful**

4. **Contact information and hands-on experience** would make district training more useful

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

Overall, 81% of sponsors participated in grant management seminars (89% of host sponsors and 75% of international sponsors). They attended mainly in person (53%).

Of those sponsors who participated in grant training, 92% received training at district seminars and 42% through the Learning Center on My Rotary.

When asked about the usefulness of topics covered during their district training, 5% of sponsors reported that finding subject matter experts wasn't a topic covered, and 17% found this topic to be not at all (8%) or not very useful (9%).

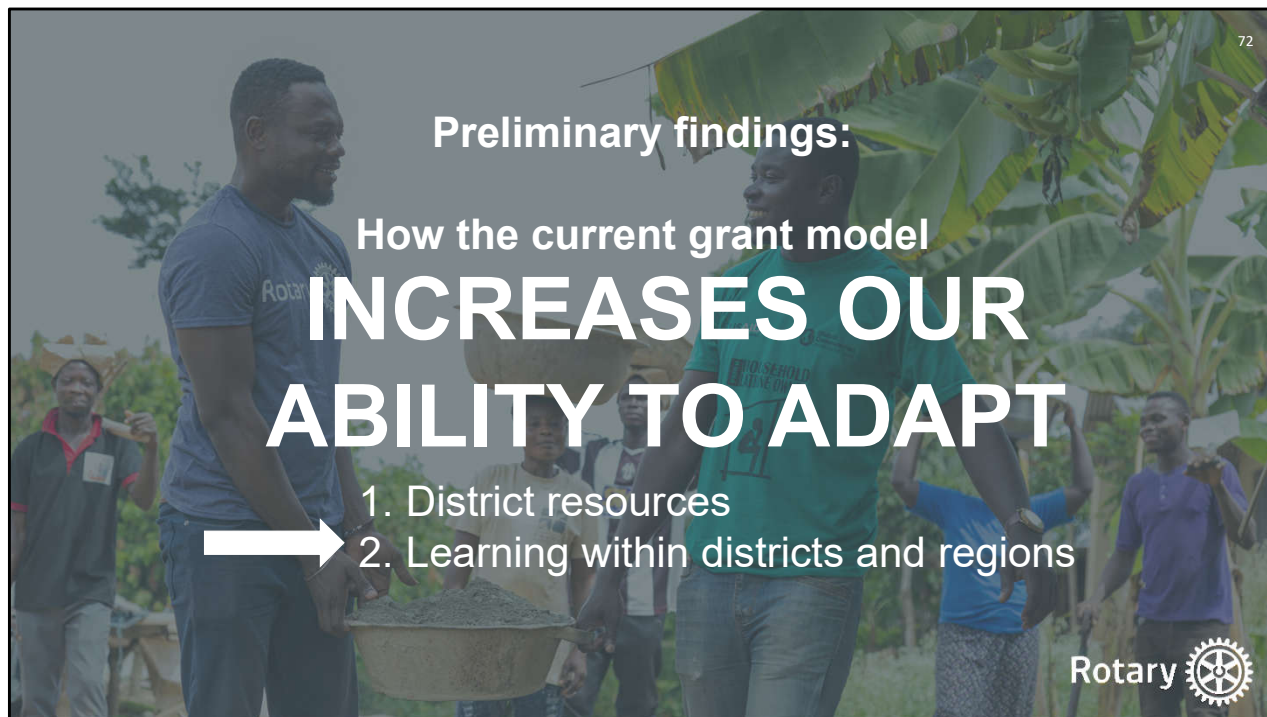The following shows the usefulness of various topics covered during district training:

	Very/somewhat useful	Not at all/not very useful
Preparing the grant application	84%	14%
Meeting sustainability requirements	83%	15%
Evaluating project outcomes	84%	14%
Monitoring project progress	82%	16%
Knowing where to find subject matter experts/resources	78%	17%

What would have made the topic of finding subject matter experts more useful during the district seminar? Here are some responses:

- "Names and contact information. We were given titles and Rotary International as contacts, but I don't believe we were even given the Regional Grant Manager name." — International sponsor, spring 2023

- "The district may do well to use primary contacts of the past grants implemented. These people may talk first-hand [about] their experience and follow [up with a] case study." — Host sponsor, spring 2023

Notably, 46% of district chairs said their district lacks a database of the technical experts within their district resource network. This would be an important adaptation: Districts need to provide a database listing experts' contact information and field of expertise to clubs interested in implementing international service projects and applying for global grants.

Preliminary findings:

How the current grant model
INCREASES OUR ABILITY TO ADAPT
1. District resources
2. Learning within districts and regions

Rotary

How do global grant sponsors prioritize learning and knowledge sharing? We explored how they share the successes and challenges of their projects and build on lessons from each global grant, particularly with respect to project design, project management, and monitoring and evaluation.

Here are the evaluation questions for this section:

- How do members share the successes and challenges they experience during the design and implementation of global grant projects?

- Are there differences between international and host sponsors' needs for learning about design and implementation?

- What lessons do sponsors share about their closed projects?

SUMMARY OF FINDINGS ABOUT
KNOWLEDGE SHARING IN GLOBAL GRANTS

1. **About 80%** of sponsors shared their achievements with other clubs and local communities, mainly through social media and club websites.

2. **About half** of sponsors shared challenges and lessons learned with other clubs and local communities, mainly through social media and club newsletters.

3. **More host sponsors** than international sponsors **focus on sharing knowledge.**

4. **Most sponsors said they learned** that **local buy-in and support are key** to successful projects.

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23, including canceled grants

We see a general interest in transferring knowledge through global grant projects. Many sponsors (43%) indicated a preference for projects that transfer knowledge, and 85% said that improving Rotary's public image is extremely (50%) or very important (35%).

Most sponsors of closed grants reported that they've shared their achievements. Overall, 80% shared them with other clubs, and 79% shared them with their local communities.

More than half of sponsors of closed grants (56%) reported that they've shared challenges and lessons learned with other clubs. But less than half of sponsors of closed grants (46%) said they've shared challenges and lessons learned with their local communities.

Most of the sponsors who share their achievements and challenges do not use channels provided by Rotary International, such as Rotary Showcase or Rotary magazines. Instead, most rely on social media platforms (89%) and club websites (81%) to publicize their project achievements. Most rely on social media (75%) and club newsletters (71%) to publicize challenges and lessons learned.

Host sponsors focus more on transferring knowledge and publicizing successes and lessons learned from their global grant projects than international sponsors.

Across all areas of focus, most sponsors say that local buy-in and support are key to successful and sustainable global grant projects. Gaining local support starts with community assessments and continues through communicating and raising awareness throughout the project lifecycle.

MORE HOST THAN INTERNATIONAL SPONSORS SHARE PROJECT ACHIEVEMENTS WITH COMMUNITIES AND OTHER CLUBS

Did your club or district publicize the achievements of the project you sponsored with …	International (N=562)		Host (N=455)	
	Local community	Other clubs	Local community	Other clubs
Yes	65%	75%	**91%**	**85%**
No	23%	15%	5%	8%
Not sure	12%	10%	4%	6%

Of those who publicized achievements:

More than half used club and district outlets
1. Social media (89%)
2. Club website (81%)
3. Club newsletter (77%)
4. District newsletter (66%)
5. District website (63%)

Less than half used Rotary outlets
6. Rotary Showcase (44%)
7. Rotary magazine (37%)

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23

Overall, 80% of sponsors shared project achievements with other clubs, and 79% publicized them in their local communities. When we look at these results according to type of sponsor, we see that 91% of host sponsors shared achievements with their local communities compared with 65% of international sponsors. Similarly, 85% of host sponsors shared achievements with other Rotary and Rotaract clubs compared with 75% of international sponsors.

Sponsors mainly used social media and club and district channels to publicize their achievements. Less than half used Rotary channels, which are available to all Rotary members. This limits the number of Rotary members who may learn from other global grant projects.

MORE HOST SPONSORS THAN INTERNATIONAL SPONSORS SHARE PROJECT CHALLENGES AND LESSONS LEARNED WITH COMMUNITIES AND OTHER CLUBS

Did your club or district publicize the challenges or the lessons learned from the project you sponsored with …	International (N=562)		Host (N=455)	
	Local community	Other clubs	Local community	Other clubs
Yes	31%	48%	**54%**	**59%**
No	49%	35%	34%	28%
Not sure	20%	17%	12%	13%

Of those who publicized challenges or lessons learned:

More than half used club and district outlets
1. Social media (75%)
2. Club newsletter (71%)
3. Club website (65%)
4. District newsletter (55%)
5. District website (54%)

Less than half used Rotary outlets
6. Rotary magazine (36%)
7. Rotary Showcase (35%)

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23

Overall, 56% of sponsors shared challenges and lessons learned with other clubs, and 46% publicized them in their local communities. When we look at these results according to type of sponsor, we see that 54% of host sponsors shared challenges and lessons learned with local communities compared with 31% of international sponsors. Similarly, 59% of host sponsors shared challenges and lessons learned with other Rotary and Rotaract clubs compared with 48% of international sponsors.

Sponsors mainly used social media and club and district channels to publicize challenges and lessons learned. Less than half used Rotary channels, which are available to all Rotary members. Again, this limits the number of Rotary members who may learn from other global grant projects.

WHAT DID YOU LEARN THROUGHOUT THE PROJECT LIFECYCLE THAT WOULD BE USEFUL TO OTHERS WHO WANT TO DO THIS TYPE OF PROJECT?

Source: 2023 survey of global grant sponsors whose projects closed in 2021-22 and 2022-23

This word cloud summarizes sponsors' answers to the question, "What did you learn throughout the project lifecycle that would be useful to others who want to do this type of project?" The largest words were mentioned most frequently.

The majority of sponsors with closed grants emphasized the importance of partnering with local communities and experts, conducting community assessments, and securing local support from various stakeholders to develop successful, sustainable projects. They also said that training and preparation before designing projects, along with communication, raising awareness, and monitoring progress throughout the project lifecycle, are key. Most of these are requirements or best practices that are already built into the global grant process.

A quote from a host sponsor sums up this section well. The sponsor learned "[t]hat we can improve lives by engaging positively with other Rotarians. It does not take too much to make a lasting difference in a community. There is support out there, and all one needs to do is voice their challenges. Rotary is doing more than Rotarians care to make public. We should work on publicity more so that we become more impactful."

NEXT STEPS IN 2023-24

In 2023-24, we will continue to monitor trends to determine how global grants can increase our impact, engage our members, and increase our ability to adapt. We will summarize our findings in the final report in the five-year evaluation. We'll continue to send annual and quarterly surveys to our members, global grant applicants, sponsors of closed grants, and club and district leaders. We'll also work to identify potential enhancements to the global grant model through additional surveys, interviews, and focus groups. These will allow us to hear from Rotary leaders who are highly engaged in the program, along with leaders of non-participating clubs and clubs that haven't repeated their participation in global grants.