Preparation for Rotary Global Grants

A guide for Rotarians who want to run a Global Grant

TOOLS		
Word / Google Doc	Used to prepare project documents consisting of words	Learn how to use: Styles, Indents, Numbering/Bullets, Tables, Basic formatting, Table of Contents
Excel / Google Sheet	Used to manage your numbers	Basic formulas, use of different sheets, sum, basic formatting, pivot tables
Powerpoint /Google Slides	Used to present your information	NO MORE THAN 6 WORDS per PAGE. Use Pictures, tell stories, put your words in the NOTES
Internet Browser	Windows Explorer, Chrome, Safari	Create a SHORTCUT MENU for your project. Add bookmarks/shortcuts to your CLUB, District5360 and Rotary.org; add shortcuts to your shared folder on Chrome or Office 365.
eMail	Communication	Create GROUPS to address your team(s). Create FOLDERS to store your emails. E.g. GG2435678 with sub folders: BUDGET, SIGNED DOCS, QUESTIONS, MEETINGS
File Storage	Store all your files on your computer	Create FOLDER and SUB FOLDERS E.g. GG2435678 with sub folders: BUDGET, FUNDING, IMAGES, APPLICATION, SIGNED DOCS
File Sharing	Google Drive or Office 365	Create FOLDERS e.g. Finance, Reports, Meetings
OnLine Meeting	Google Meets or ZOOM or SKYPE or Microsoft Teams	Find the right platform for your team
Designer Tool	Canva	It's free and has great templates e.g. Executive Summary
Printer/Scanner	Sign and scan documents	Learn how to use your printer as a scanner!
District 5360 Grants Website	Get "trained"	Getting "trained" means getting access to the site. Know where it is; know how to use it
MyRotary Account	Create account	Find the Grant Centre under The Rotary Foundation. Find all the reference documents

PEOPLE		
Host Club	Club on the ground **where the project is happening**	Find your Champion and 2 other team members. Get to know them. Establish roles and responsibilities
International Club	Club **OUTSIDE the country** where the project is happening	You need a CHAMPION and 2 other club members on your team. Establish roles and responsibilities if needed.
Cooperating Organization	If the Rotary HOST club is not doing all the work, this is the organization that executes the project.	Get to know them. Get their contact information. Know how they do their financial reporting and get a sample.
TRF Country Representative	Find the person who oversees GG in the country you are doing a project	Available download from the Grant Centre (My Rotary | The Rotary Foundation) You will need to communicate with them at some point in the project.

DOCUMENTS		
TRF Guide to Global Grants	1000_guide_to_global_grants.pdf	Great overview of the whole process
TRF Global Grants Terms and Conditions	READ THE WHOLE THING	Available download from the Grant Centre (My Rotary | The Rotary Foundation)
Rotary Grants Staff Contact Sheets	Find your country representative	Downloadable from RI Grants Centre
Area of Focus Policy Statements	READ THE WHOLE THING pertaining to **your area of focus**	The policy statements addresses your specific subject and will be clear about what you can and cannot do. Available download from the Grant Centre (My Rotary | The Rotary Foundation) Stick with 1 Area of Focus; the more you choose the more questions you have to answers and the more you have to report on (activities, beneficiaries etc…)
COMMUNITY ASSESSMENT REPORT	READ THE WHOLE THING	Available download from the Grant Centre (My Rotary | The Rotary Foundation) Work with your Host Club and Coop org. to get all the answers required
6 Steps to Sustainability	READ IT and UNDERSTAND	Available download from the Grant Centre (My Rotary | The Rotary Foundation) Evaluate your project along all 6 aspects of sustainability

MOU for Global Grants	READ IT & ENSURE YOUR CLUB HAS EVERYTHING IN PLACE & SIGN	Available download from the Grant Centre (My Rotary | The Rotary Foundation) Have the Host club sign and the Cooperating organization sign.
MOU with the District	READ IT & SIGN	Make sure you understand what your club is agreeing to in this document. The District conducts audits from time to time to ensure you have all the agreed processes in place and are adhering to the processes. Available download from the District Grants Website. Have your club president ELECT and president NOMINEE sign
Club Approval Document	REQUIRED BY DISTRICT	Have your president sign and indicate the amount you are going to fund; it also requires the Global Grant Number. This gets emailed to d5360grantshelpdesk@gmail.com
Funding Calculator Spreadsheet	D5360_global_grant_calculator_v2	Downloadable from the District Grants Website. This becomes your friend so you can accurately calculate at any time how much money you have towards our project. Keep different version – just rename them: e.g. 2023-04-25 GG2435678 FUNDING. It makes it easier to find the right one and you may have to go back a few versions!
Recommended: Project Plan Template	Will have all the appropriate headings for your project.	You can download the Global Grant template but you'll need more than that to oversee your project. (e.g. Stakeholders, Risks, Work Breakdown Structure, Timeline)
Learning Centre	Videos	The Rotary Foundation > Grant Management Seminar (Grant management overview, Planning for sustainability, Conducting a Community Assessment, Project Planning, Scholarships, Roles & Responsibilities, Financial management, Reporting, Protecting Youth Program Participants, Club Qualification) Grant Management Recertification 2022-2023 (**Areas of Focus**, Youth-guide to service learning)