

District 5360 Rotary Global Grants Guide

The step by step process from ideation to completion of a Rotary Global Grant

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Getting Approval (Yes Yes Yes)

Why are you doing this?

Before you even begin contemplating a Global Grant type of international project, read and familiarize yourself with:

- TRF Grant Terms & Conditions
- Area of Focus Policy Documents
- 1000_Guide_to_Global Grants
- 605_Community_Assessment_Tools

Unless you have read these, DO NOT PROCEED.

In addition, get very, very clear on WHY you are doing this project. Ask WHY at least 4 times. Your “why” is what will sustain you through this lengthy and arduous process. The “WHY” should come from your Community Needs Assessment, a TRF requirement for any global grant, and not what you think is required.

You will need to get approved at 3 levels before any project work (expenditures or commitment of funds) can be done.

Meet Qualification Requirements

Attend the District Grants webinar in October

Your club must have USD50 per capita donation to TRF

Your president elect & nominee must have signed MOU with the District

Your funding clubs must also be qualified

You must be marked as “trained” on the District Grants Website

What are you doing?

Sketch out basic idea and work on a calendar based on April 1st as the opening day for District Designated Funds for Global Grants.

Get a GG Number

Create a new Global Grant in the TRF Grant Centre

Use that number in naming your files:

Examples include

- GG2435678 BUDGET.xlsx
- GG2435678 PLAN.docx
- GG2435678 FUNDING MODEL.xlsx
- GG2435678 MOU.PDF

NOTE: From the moment to get a global grant number assigned to your project, you have 1 year to complete the application and get all approvals and authorizations completed. If you

exceed the 1 year timeframe your project will be cancelled (note this is not rejected but cancelled)

Write it down

Create basic document with:

- Project Name
- Project Location
- Host Club Name & Contact
- Cooperating Organization Name & Contact
- Executive Summary
- Goals/Objectives
- Outcomes
- Community Assessment Results
- Sustainability evaluation
- High Level Budget
- Funding Model
- Bank Account Information for the Host Club designed project account
-

HINT: look at the District Global Grant application questions AND the TRF Global Grant application questions. Answer those in your basic document.

Get Club Approval (Yes No. 1)

Follow approval process for your club. Find out what it is and how long it takes

Example: RC Calgary:

Prior Year: Propose idea and budget

Submit to New Projects Sub Committee

Seek approval at World Community Services Committee

If amount >\$10,000 Canadian seek approval from Board

Find Funders

Reach out to other clubs anywhere in the world for financial support.

Clubs do not have to transfer any funds until the project is approved by TRF.

In District 5360: Get supporting club(s) to fill out the CLUB APPROVAL DOCUMENT available on the District grants website.

Use the D5360_global_grant_calculator_v2 spreadsheet to figure out how your funding works and if you have met your target.

Answer Questions

Be prepared to do more homework and go back to the communities, host club, cooperating organization for more information. The better you prepare at this stage, the easier it will be to write your grant on the TRF Grant Centre.

IMPORTANT: THIS PROJECT IS A PARTNERSHIP. Both clubs are equally accountable for the success of the project. Ensure you know who is responsible for what. Get your HOST CLUB to participate in the project (more than just overseeing the financial aspect). Get them involved in decision making; visits to the site; project launch / close celebration etc...

If you have not already looked at the Global Grant application form on the TRF Grant Centre NOW IS THE TIME TO DO IT! Answer all those questions!

Approval from District (Yes No. 2)

Submit your application online at www.rotary5360.ca/page/grants

Ensure all your funding clubs have sent in their CLUB APPROVAL documents signed by the president.

Once you have received your YES from the District, work with your Host Club and Cooperating Organization to develop the DETAILS of the budget if you have not already done so. This MUST include the CATEGORIZATION, as defined by TRF, of all budget items. You will have to input the budget by category and report on the expenditures by category. Some categories have maximum amounts allowed e.g. Administration cannot be more than 10% of the budget.

Cadre Visit

So your project is >USD\$100,001? The Rotary foundation will send a representative from the Cadre of technical advisors (subject specialist) to visit your Host Club and Cooperating organization to review the project. You may have to change aspects of your project based on their recommendation. TRF handles the logistics of the visit with the HOST club.

Above USD400,001 approval by the Rotary Foundation Board of Trustees is required. The Trustees meet quarterly.

NOTE 1: Recommendations by the Cadre or the Regional Grants Advisor are provided to ensure your project is successful and sustainable, not to turn you down!

NOTE 2: The District is approving or authorizing the use of District Designated Funds (DDF) for your project. It is not approving the project itself. The team review it to make sure all qualifications are met and to offer advice to ensure success from TRF but DOES NOT APPROVE the project just the use of DDF.

Approval from TRF (Yes No. 3)

Now you should have the following:

- 1) Approved budget
- 2) Approved funding model (lead club grant and supporting grants if necessary)
- 3) All questions answered

Fill out the grant application on TRF Grant Centre

You and your host club champion will need to SUBMIT and APPROVE your grant application.

PRESIDENTS (both international and host clubs) will have to AUTHORIZE

DISTRICT FOUNDATION CHAIR (both international and host clubs) will have to AUTHORIZE

DISTRICT GOVERNORS (both international and host districts) will have to APPROVE

WAIT as the Regional Grants Officer reviews your application.

NOTE 1: You may get an email from the TRF Country representative requesting more information. DO NOT WAIT. You have 6 months between the time you clicked SUBMIT and the time the grant is approved. If it is longer than 6 months, the project will be CANCELLED and you'll have to start again. Yes, you'll lose your District Designed Funds and have to wait til the next year to re-apply. Yes, this has happened more than once in our district.

Project Implementation

This is where typically the cooperating organization takes the lead and implements all of the activities described in your project plan/grant application.

Transferring Funds

You never see the District Designated Funds for your Global Grant

You and your supporting clubs have 2 choices:

1. Transfer funds **directly to the designated project bank account** held by your HOST CLUB. You and your Host Club will have to email TRF proof that the funds were both SENT and RECEIVED in the designated bank account before TRF will transfer funds to the account.
2. Transfer funds to **The Rotary Foundation**. NOTE: **YOU HAVE TO ADD 5%** to the amount for administrative costs.

NO PROJECT WORK/EXPENDITURES CAN HAPPEN BEFORE YOU GET THE OFFICIAL EMAIL STATING THE PROJECT IS APPROVED. THIS INCLUDES COMMITTED FUNDS I.E. SIGNED CONTRACTS FOR WORK TO BE DONE.

For larger or longer projects, it is customary not to send all the funds at once. Both TRF and the International club can withhold some of the funding pending the interim report.

NOTE: Once TRF has approved a project and transferred the funds the District's role is by and large over. All reports are submitted to and approved by TRF. The District is responsible for ensuring all the clubs are current on their reporting and offer any support if the club is having a challenge.

Stay in Touch / Monitoring

Once your project begins, stay in touch. The frequency of communication depends on the complexity and length of your project. Determine this in collaboration with the Host club and the Cooperating Organization.

If your cooperating organization sends out newsletters or informational pieces on the progress of your project, share it with your CLUB and your FUNDERS.

Keeping Track of Funds

The basic requirement for tracking funds is that ALL RECEIPTS must be retained and can be requested at any time.

You will want to make sure you can report on the amounts spent by ROTARY CATEGORY (see budget)

In some cases the International Club can hold a bank account for the project. An example would be if there is a purchase of a large medical device and people need to travel to the host country to train others on how to use the device. Funds could be held by the International club to pay for the device & training.

Interim Reporting

Insist on getting regular reports. Communicate clearly what you want to see in the report. Have the HOST CLUB and/or Cooperating Organization take pictures and provide some measurable outcomes on a regular basis.

You are required to submit an interim report if your project is more than 1 year.

Share your Interim report with your CLUB and your FUNDERS.

Once the interim report is approved, the remaining funds will be transferred by TRF and you can do the same with local (to the International Club) funds.

NOTE: If your report is late, you will be holding up all DDF funding for your club's other projects; if it is really really late, funding for the entire District can be suspended, yes, everyone else's projects' funding from the District can be on hold!

Final Report Close Off (Final YES)

Your final report is DUE NO LATER THAN 2 months after your project is completed.

You can return unused funds. The Host club is responsible for that. There are instructions in the TRF Grant Centre for this process.

Share your final report (it may have to be officially filed in your Club's archives) with your CLUB and your FUNDERS.

Once your project final report has been approved by TRF, you will receive an email indicating that the project is now closed.

CONGRATULATIONS!