World Community Service Committee
Rotary Club of Cupertino
Policies

Overall Summary

Cupertino Rotary Club's (CR) World Community Service Committee (WCS) meets monthly. Meetings are led by the WCS Chair, supported by the WCS Co-Chair[1]. Venue and timing of meetings will be determined by the current Rotary Year WCS Chair.

WCS directs the identification and management of effective sustainable projects, upcoming trips to visit project sites and our partners in Rotary around the world. All Cupertino Rotarians are encouraged to participate in monthly WCS committee meetings, project trips and activities, including Global Elegance,[2] and to engage in Rotary's emphasis on World Community Service.

WCS Committee members learn from each other and from the shared experience of taking projects from idea to proposal, to implementation and completion.

I. Primary categories of World Community Service project activity:

CR preferentially targets the use of all District Designated Funds (DDF)[3] in Global Grants, versus District Grants, because they leverage our Club's resources with matching funds from The Rotary Foundation (TRF). Furthermore, International Sponsorships, for which Cupertino Rotary has overall leadership and responsibility, should take precedence over Financial Contributions to other Clubs, especially when there are insufficient funds to cover a full range of projects. Any project proposed to WCS, International Sponsorship or Financial Contribution, must have a Project Champion.

A WCS Project Proposal Form is required to present an International Sponsorship or a

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[1] The WCS Chair serves a one-year term aligned with the Rotary Year, July 1 through June 30, following one year as Co-Chair supporting the previous WCS Chair. The WCS Co-Chair is appointed by the President-Elect, in agreement with the previous year's WCS Chair, the President, and President-Nominee, with input from WCS Advisory Committee. The Chair and Co-Chair will serve on the President's Cabinet.

[2] Global Elegance is a Cupertino Rotary Endowment Fund (CREF)- sanctioned fundraising/celebratory event for Cupertino's international service.

[3] DDF are District Designated Funds. Cupertino Rotary receives its pool of DDF each Rotary Year for funding Global Grants (or District Grants) based on the previous few years of its members' contributions to TRF.

Financial Contribution for a GG opportunity to WCS for consideration. If the proposal is for another Rotary Club's GG, a pdf of the GG should be appended to the submission. Additional information describing the need in the beneficiary community and total project budget would be helpful (see Project Proposal checklist).

I.1 – Global Grant International Sponsor: As a Global Grant (GG) International Sponsor, CR leads the GG and partners with other Rotary Clubs for funding to implement international projects that are approved and overseen by TRF. These GGs must meet TRF requirements that fall within the seven Areas of Focus with measurable and sustainable outcomes. To qualify for International Sponsorship, CR WCS must be recognized by TRF as compliant on the GGs it leads. CR WCS, per TRF rules, can maintain no more than 10 International Sponsorships at any time. International Sponsor GGs must be in compliance and completed in a timely manner to enable other Champions' proposals to be considered for these positions in the WCS Matrix.

I.2 – Global Grant Financial Contributor: CR WCS may also contribute to other Rotary Clubs' Global Grants through cash or DDF. Other Rotary Clubs' international project considerations (e.g., Faces of Hope, Wheelchair Delivery, disaster relief funding) can be considered on a case-by-case basis, depending on the availability of WCS funds. These opportunities must be vetted by the Project Champion and the WCS Chair/Co-Chair prior to presentation to the WCS Steering Committee and WCS.

I.3 – District Grants: District Grants fund projects that address needs in communities worldwide. They also call for partnering with a Rotary Club in a country where the project will take place. CR WCS does not normally sponsor any District grants, but if the CR WCS does support another club's District grant, the support will be provided in the form of cash, not DDF.

II. WCS Advisory Committee

Because GG management can be very complex and a failure can negatively impact CR WCS activities, CR WCS has identified a need for an Advisory Committee to ensure compliance with this WCS Policy and to guide CR WCS in making decisions on international projects and host clubs. The Advisory Committee provides recommendations and guidance to WCS but does not have decision making authority. This Advisory Committee should, at the minimum, consist of WCS leadership, financial and administrative, and experienced GG Champions.

In order to keep to a manageable committee of 8 members, the Advisory Committee should consist of:
- Committee Chair and Co-Chair
- WCS Treasurer
- WCS Secretary
- Past WCS Chairs (at least two, but no more than four)[4]

The WCS Chair or Advisory Committee may appoint additional *Ad hoc* members, as needed for guidance and advice. Ad hoc members might include, for example, the CR Fund Development Officer, the CR President, or other CR member. A quorum consists of at least the WCS Chair/Co-Chair, Treasurer, and at least two past WCS Chairs.

The WCS Advisory Committee will meet at least twice a year (for review of project proposals) and as needed, to address issues that arise in WCS meetings.

III. Rotarian Project Champions

III.1. Proposals for Cupertino Rotary-led International Sponsor GGs

For a proposal to be brought before the WCS, an active WCS member must volunteer to be the Project Champion (also called Champion in this document). Champions are encouraged to invite less-experienced WCS members to participate on their GG committee. An experienced WCS GG mentor will be assigned to support the GG Champion as needed.

Project Champions are required to:
- Avail themselves of GG project training to become familiar with the processes and requirements of project proposal, implementation and completion. WCS will regularly conduct basic GG training (a brief training module will be added to WCS meetings; in addition, GG workshops will be scheduled)

- Regularly participate in monthly WCS committee meetings

- Volunteer, and/or provide financial support to Global Elegance, TRF Campaign, and other WCS fund-raising events and programs

- Access the WCS Project Proposal Form and work with an assigned or invited WCS mentor with specific regional and/or Area of Focus (AOF) experience to vet project

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[4] Each year, the WCS Chair will invite two to four past WCS Chairs to serve on the Advisory Committee for his/her year

ideas for eligibility, sustainability and TRF compliance

- Engage at least two WCS members, who will comprise the Grant Committee for the project proposal. If this is the Champion's first proposal, an experienced GG mentor should be invited to the GG committee

- As a guideline for a funding proposal, Cupertino Rotary's contribution for an International Sponsorship GG can be up to 30% of the total project value, but should not exceed $35,000. Ultimately, WCS will make the final decision based on available funds and other criteria relevant at the time of the decision.

  Beyond this guideline, primary consideration for WCS financial contribution will be looked at through a lens of various factors, including for example: the size of our financial reserves, number of anticipated projects in the pipeline, the time horizon for project implementation, geographic diversity, partner Rotary and other relationships, mix of projects across TRF's areas of focus.

When the application process results in an approved and funded project, the Cupertino Rotary Project Champion is required to attend WCS meetings to report monthly on the status of the project on the WCS Project Matrix and through regular updates at WCS meetings throughout the GG lifetime, from GG submission to TRF acceptance of the final report and the closure of the project.

To create opportunities for more Rotarians to become involved with WCS projects, any one Rotarian is encouraged to be the lead Champion for only one approved new International Sponsorship project per Rotary year. Champions for a GG project are encouraged to focus on only one project, or one open grant at any point in time, when practical. This expectation is intended to increase participation, but also to ensure that Cupertino Rotary stays in compliance with TRF project oversight. Whenever any one project is in "non-compliance," TRF will block the Club from initiating any new projects until the issue is resolved.

WCS recognizes and appreciates that any one Grant Champion may serve on a grant committee for another project for which an experienced member is needed.

To gain experience, new members to the WCS committee are encouraged to participate on grant/project committees to be introduced to the planning, execution and communications regarding a grant/project. They may also volunteer to be Champions for other Rotary Club GGs. These opportunities offer the experience without the full responsibility for an International Sponsor GG.

Grant/project champions may not be a proxy for another CR member who does not participate in WCS. If another member wishes to propose and implement a project, he or she must join WCS as an active member.

III.2. Proposals from other Rotary Clubs for Financial Contribution

WCS will consider funding of other clubs' projects brought by a member of our committee, also called a Project Champion for a Financial Contributor GG. Funding allocations to other clubs' projects will be considered at various meetings throughout the year, as such requests are made and projects presented. WCS prefers to reserve the majority of its cash and DDF for International Sponsor GGs, led by CR WCS.

For a proposal from another Rotary Club to be considered for funding by the WCS, a Cupertino Rotary WCS member must agree to take on the role of Project Champion.

WCS Project Champions for other clubs' projects are advised to:
- Check in with the WCS Chair for initial discussions. The WCS Chair and Co-Chair will be able to identify mentors, if needed, for the champion to help vet the project for eligibility and sustainability and assist in preparing for a WCS presentation.

- Complete the WCS Project Proposal Form, utilizing WCS mentor(s). Provide a copy of the proposal to the WCS chair, as well as other project documents (e.g., Needs Assessment, GG application, Intl Sponsor contribution amount) at least ten days prior to the meeting in which project proposals will be considered.

- The GG mentor(s) should be able to assist with evaluation of project viability as well as financials and appropriate project value requests of WCS.

- As a guideline for a funding proposal, Cupertino Rotary's contribution should not exceed that of the International Sponsor Club, nor should it be greater than 6% of project value, nor in excess of $10,000. Ultimately, WCS will make the final decision based on available funds and other criteria relevant at the time of the decision.

WCS Champions for other clubs' projects are required to report the status of the project at significant milestones defined in the GG through the WCS project matrix (e.g. GG submission and approval, start of activities, attainment of project milestones, completion

and submission of progress reports and the final report, acceptance of the final report, and closure of the project). They are expected to represent the project at WCS meetings, and on the Matrix, until final report and closure.

IV. Global Grants

IV.1. International Sponsored project proposal objectives and timeline

During any Rotary year, the WCS will seek to consider only one new initiation of an International Sponsorship GG project with the same partner Rotary Host Club or cooperating organization. The objective is to support careful project management and full compliance with TRF requirements through acceptance of the final report; to encourage champion opportunities for numerous members. Project ideas are ideally developed and evaluated for WCS decision-making in the fall and spring timeframe.

WCS should normally hold up to two meetings (fall and spring) to hear project proposals and financing plans, while maintaining the flexibility to review proposals in the interim should this action be warranted. The intent is to hear competing proposals at one place and time, to enable the committee to best decide which proposals to support with the limited resources available to the club. At this meeting, committee members who regularly attend WCS meetings will be asked to use a proposal assessment sheet to anonymously express opinions on the proposals being considered.

IV.2. Fundraising expectations: As there are usually more worthy projects than the club can fund in one Rotary year, project champions are required to engage in fundraising to support their project. The WCS Committee encourages champions to take advantage of all the following funding resources and others which may become available, such as:

- Seeking funding from other Rotary Clubs and Districts
- Partnering with cooperating organizations
- Seeking funding from outside organizations/corporations/individuals
- Publishing the project on matchinggrants.org/global
- Publishing the project on Rotary Ideas (subject to availability)

V. Proposal Review and Selection Process

WCS meetings are the primary forums for discussing new Cupertino Rotary World Community Service projects. Members are encouraged to present project concepts and travel reports to WCS throughout the year.

V.1. International Sponsor GG Proposals: WCS members interested in championing a GG

are requested to present concepts for possible projects to WCS Chair and/or an experienced mentor on an ongoing basis, throughout the year.

When the Champion is prepared to present a proposal to WCS, the following process should be followed:

- A WCS Proposal Form should be submitted to the WCS Chair for initial review

- The WCS Chair will submit WCS proposals to the WCS Advisory Committee for initial review and discussion prior to the fall or spring WCS review sessions

- Eligible GG proposals will then be presented to the full WCS for consideration

V.2. Financial Contributor GG Proposals: WCS members interested in championing other Rotary Clubs' GGs will also follow the above process. This process can be at any point throughout the year because timelines will vary for other Clubs and their GGs.

V.3 Financing Decisions and the Role of the WCS Treasurer: The WCS Committee will decide and vote on the CR WCS contribution for all proposals by its member Champions. A range of suggested contribution amounts may be offered by the Advisory Committee; however, the WCS Committee will make the final decision. The contribution amount shall be proposed in 'total project value' or the desired dollar-equivalent amount to be offered. The WCS Treasurer shall use their best judgment, including guidance from the Advisory Committee, as to the use of District Designated Funds (including the option of direct DDF or Max-the-Match purchase of DDF) or Cash, depending on the availability of these options to CR WCS. Any cash contribution will include the transaction fee such that the entire agreed-upon amount is offered to support the GG as decided by WCS. The Treasurer will communicate the final decision for support type to the GG Champion and in the Financial Report to the WCS.

VI. WCS Approved Projects:

Following WCS approval, one year is allowed to complete project financing and submit a final project proposal to The Rotary Foundation, District 5170, or CR's WCS. If the GG submission cannot be accomplished (financing and submission to TRF) within a 1-year timeframe from WCS decision, the GG Champion will be asked to explain delay and discuss plans with WCS for possible extension.

Document Revision History

Date	Document Changes	Responsible
2014, 7/2016	Initial Document defining process	Peter Troop, WCS Chair and Steering Committee
2022	Revisions to include process for preparing proposals for WCS	Jagi Shahani, incoming WCS Chair, RY2022-23
12/18/2024	Clarification of policies and proposal process, revision of proposal review process with Advisory Committee oversight, streamlining policies and removing detailed process descriptions to other external documents	Bob Pruitt, Mauri Okamoto-Kearney, WCS Co-chairs RY 2023-24, Revised RY2024-25 for WCS final approval in 12/18/2024 meeting.