

## **Rotary Club of Cupertino World Community Service Committee World Community Service Project Proposals**

### **Project Categories/Champions/Process/Selection**

Cupertino Rotary's World Community Service Committee meets monthly on the fourth Tuesday at 7 PM. Contact either co-chair Jagi Shahani or Bob Pruitt for meeting details and Zoom logins when meetings are virtual.

The committee discusses the process and requirements for effective projects, projects underway, projects to be proposed and completed, upcoming trips to visit project sites and our partners in Rotary around the world.

- Every Rotarian is encouraged to participate in monthly WCS committee meetings, project trips and activities including Global Elegance,
- Attend, learn and engage Rotary's emphasis on World Community Service,
- Committee members learn from each other and from the shared experience of taking projects from idea, to proposal, to implementation and completion.

### **I. Three primary categories of World Community Service project activity:**

#### **1 – Global Grants**

Most CR WCS projects are conducted as Global Grants that leverage our Club resources through matching funds from The Rotary Foundation. Through Global Grants, CR partners with other Rotary Clubs to implement international projects that are approved and overseen by TRF and meet TRF requirements that fall within six Areas of Focus with measurable and sustainable outcomes.

A WCS Mentor Project Questionnaire form, downloadable from the WCS page on the CR Web site, is used to begin the process of developing a Global Grant proposal to bring to WCS committee for consideration.

#### **2 – Participating contributions**

Participating contributions have CR contributing to the financial requirements of another Rotary Club's Global or District Grant project. Decisions to participate in projects led by other clubs typically arise from the review of the project materials, discussion and assessment by the WCS.

### **3 – District Grants**

District Grants fund smaller, short-term activities that address needs in communities world-wide. They also call for partnering with a Rotary Club in a country where the project will take place. These projects are not overseen by TRF, are all cash and lack the leverage of matching funds.

A [District 5170 application for international projects](#) is used to develop a District Grant project proposal and bring it to WCS.

## **II. Rotarian Project Champions**

### **1. Proposals for Cupertino Rotary-led projects**

For a proposal to be brought before the WCS a Cupertino Rotarian needs to act as Project Champion.

Project Champions:

- Avail themselves of Global and District Grant project training to become familiar with the processes and requirements of project proposal, implementation and completion;
- Regularly participate in monthly WCS committee meetings;
- Volunteer, and or, provide financial support to Global Elegance and other WCS fund raising events and programs;
- Complete the WCS mentor Project Questionnaire; schedule (thru the WCS chair) a Cupertino Rotary mentor meeting to vet project ideas for eligibility, sustainability and TRF compliance;
- Engage two additional Cupertino Rotarians, who with you comprise the Grant Committee for your project proposal.
- If this is your first proposal, enlist a Cupertino Rotarian with previous project experience to serve on the grant committee for your project proposal;

When the application process results in an approved and funded project the Cupertino Rotary Project Champion is required attend WCS meetings (at least 50%) to report monthly the status of the project on the WCS project matrix and by regular updates at WCS meetings - through TRF acceptance of the final report for the project.

To create opportunities for more Rotarians to become involved with World Community Service projects, any one Rotarian can be the lead Champion for one approved new project per Rotary year.

Champions for Global and District Grant projects are encouraged to focus on one project, or one open grant at any point in time, where practical. This 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 blocks the Club from initiating new projects.

The committee recognizes and appreciates that one Grant Champion may serve on a grant committee for a second project where an experienced champion 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.

Grant/project champions may not be a proxy for another CR member who does not participate in the WCS committee. If another member wishes to propose and implement a project, he or she must actively participate in WCS activities as described in the above paragraphs.

When at the end of the Rotary year, not all of the available CR WCS funds have been committed, current Champions are allowed to propose additional projects.

## **2. Proposals from other Rotary Clubs**

The committee will consider funding of other clubs’ projects brought by a member of our committee by a CR champion. Distributions to other clubs’ projects will be considered at various meetings throughout the year, as such projects are presented. The WCS reserves the majority of its cash and DDF for projects initiated within our club, there is no promise of the availability of funds for projects in which CR is not the International, or Host partner.

For a proposal from another Rotary Club to be brought before the WCS, a Cupertino Rotarian needs to act as Project Champion.

Project Champions for other clubs' projects:

- Complete the WCS Mentor project questionnaire and schedule a WCS mentor meeting, by contacting the WCS chair, to vet the project for eligibility and sustainability.
- Will provide a copy of the proposal to the WCS chair at least ten days prior to the meeting in which project proposals will be considered.

In no case will Cupertino Rotary's contribution exceed that of the club sponsoring the project.

Champions for other clubs' projects are required to report monthly the status of the project, through the WCS project matrix and by regular updates at the WCS meetings, through TRF acceptance of the final report for the project.

### **III. Global Grants**

#### **Project proposal timeline and process**

Project ideas are ideally developed and tested in the fall and winter time frame. 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 committee encourages champions to take advantage of all the following funding resources and others which may become available:

- Avenues of Service, Cabinet meeting and other District 5170 events
- Publishing the project on [matchinggrants.org/global](https://matchinggrants.org/global)
- Publishing the project on Rotary Ideas (subject to availability)
- Crowd sourcing venues such as Indie-go-go, etc.\*
- Seeking funding from other Rotary Clubs and Districts
- Seeking funding from outside organizations/corporations

During any Rotary year, the WCS committee will seek to hold to only one new project to be initiated with any one partner Rotary Club or cooperating organization. The objective is to support careful project management and full compliance with TRF requirements through acceptance of final report; to maintain CR in full compliance with TRF requirements; to encourage champion opportunities for numerous members.

Typically in late spring, the WCS committee holds a special meeting to hear project proposal and financing plans. 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.

Following this project proposal meeting, the WCS steering committee will meet to consider the sentiment of the committee, prioritize cash and DDF allocations and recommend a set of project choices to the committee at a follow-on meeting.

The steering committee is comprised of the WCS Committee Co-Chairs, Chair elect, Treasurer, Secretary, club Fund Development Officer, club President-Elect, current club President and two past club Presidents.

#### **IV. Proposal Review and Selection**

WCS meetings to consider and assess new projects are typically held in the spring. They are the primary forums for considering new Cupertino Rotary World Community Service projects.

- a) 10 days before the meeting: the Champion submits to the WCS chair a draft proposal, (if for a Global Grant, include a draft Monitoring and Evaluation plan), preferred and minimum financing plans to be included in the upcoming meeting to assess new project proposals.
- b) Within 5 days of the meeting: Submitted proposal materials are circulated to the committee membership for review.

#### **At the WCS proposal assessment meeting:**

- Champions will attend to present their proposals.
- 10 minutes is allocated for each proposal presentation, including time for questions.
- After all proposals are heard, regular WCS members will have an opportunity to summarize their assessment of the various proposals on a proposal review sheet.
- Suggested factors for WCS members to consider in assessing proposals include:
  - Anticipated impact on the communities being served and the degree to which these benefits are sustainable;

- Importance to Cupertino Rotary of any cooperating organization or Rotary relationships associated with the proposal;
  - Maintain geographic diversity within the mix of existing projects and new proposals, ideally selecting only one proposal for any one country in the current funding cycle;
  - Project manageability – what is the risk that the project could expose CR to TRF non-compliance status.
- The proposal review sheets are akin to a secret ballot. They ask members to consider whether they view the project as sustainable. Overall, on a scale of one to five, how do they feel about the projects, where 1 is “would recommend against” and 5 is “highly recommend”. Additional comments are welcomed.
- The proposal review sheets will be distributed five days before the WCS meeting, at the time that the pending projects are circulated for consideration. Absentee WCS members may participate in the scoring of a proposal by reviewing the submitted proposal materials, completing the project review sheet and returning it to the committee co-chairs.

#### **Following the WCS proposal assessment meeting:**

Before the next scheduled WCS meeting, the WCS steering committee will meet to compile the project review sheets and proposal rankings provided by the WCS committee members. The steering committee will weigh the relative strength of proposals and their alignment with the criteria of The Rotary Foundation. The steering committee will develop a proposal to allocate available cash and DDF to the projects being considered.

At the next monthly WCS meeting, the steering committee reports its recommendations for full committee consideration and endorsement.

#### **V. Approved Projects:**

Projects must adhere to requirements as set by The Rotary Foundation District 5170 and CR. The Rotary Club of Cupertino does not generally have all the funds necessary to fund every project proposal presented in a given Rotary year.

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.

**Checklist for developing project proposals to bring to the World Community Service Committee for consideration:**

<p><b>1.</b> Regularly attend (at least 50%) monthly WCS committee meetings and support WCS events and programs.</p>
<p><b>2.</b> Attend Global and District Grant project training. Become familiar with the processes and requirements of project proposals, implementation and completion.</p>
<p><b>3.</b> Identify Host Rotary Club partners and potential cooperating organization partners to develop project ideas and conduct community needs assessments.</p>
<p><b>4.</b> Complete the WCS Mentor project proposal questionnaire; schedule a mentor meeting thru the WCS chair to vet the project for eligibility and sustainability.</p>
<p><b>5.</b> If this is your first project proposal, enlist an experienced Cupertino Rotarian as a member of the three-person grant committee.</p>
<p><b>6.</b> Create a draft proposal using TRF's Global Grant Portal (or if a District International Grant use the District 5170 application form). If a Global Grant proposal, draft a Monitoring and Evaluation plan using the TRF guidelines and M &amp; E template.</p>
<p><b>7.</b> Request WCS Committee approval to develop and implement a financing plan that combines Cupertino Rotary financing and financing from other Rotary Clubs. Create and present two financing plans for WCS to consider (these can be one and the same):</p> <ul style="list-style-type: none"><li>- Preferred CR financing</li><li>- Minimum CR financing needed to allow the project to go forward.</li></ul> <p>Submit a complete proposal package to the WCS chair <u>10 days before the WCS project review meeting</u>: 1) draft Global Grant application PDF; 2) Monitoring and Evaluation plan; 3) Financing plans.</p>
<p><b>8.</b> During the WCS project review meeting present your project, and allow for questions - within a 10 minute time limit. WCS committee members rank projects.</p>
<p><b>9.</b> The WCS steering committee meets to review proposal rankings, recommend projects for approval and propose funding. At the next monthly WCS meeting, the SC reports its recommendations for committee consideration and endorsement.</p>

**10.** With a WCS endorsed project, work to finalize and complete project financing: post project to [matchinggrants.org](http://matchinggrants.org); share your proposed project at District 5170 project fair opportunities. Post project to “Rotary Ideas” or similar, on the TRF web site (subject to maximum posting limitations on the site)

**Timeline for developing WCS project proposals:**

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1 - 2	Be an active participant in the WCS committee, attend monthly meetings, learn from TRF global grant resources and training on the Web; attend District and club project trainings.
3	Develop relationships with other Rotarians and clubs to identify community needs and project opportunities; develop relationships with non-government organizations who could be a cooperating organization in a project proposal.
4 Feb thru April	Complete the Mentor Project Questionnaire; schedule (thru WCS chair) Cupertino Rotary WCS mentor meeting to vet your project for eligibility and sustainability.
5 - 6	Choose your grant committee members; draft a project proposal using TRF's online tools, or the District Grant application form; draft a Monitoring and Evaluation plan
7 - 8 May	Present project proposal and supporting documentation at special WCS project assessment meeting
9 June	Steering Committee report with recommended projects and proposed CR funding presented to full WCS committee for consideration and endorsement.
10 July / Jan	<b>Finalize finance plan and project application; submit final to WCS chair(s) for final CR review;</b> submit to TRF (non-global grant District Grant proposals: submit final proposal to WCS.)

**Cupertino Rotary Financial Participation in Projects led by Other Clubs:**

June / Aug	The ideal time for WCS to entertain proposals for financial-only CR participation in projects led by other clubs is following approved funding of CR projects.
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