

Global Grants A Primer

PART I

I. What is a Global Grant

Global grants support large international activities with sustainable, measurable outcomes in Rotary's areas of focus.

A Global Grant project involves Rotary clubs from two or more countries uniting to serve one of their communities.

World Community Service is the Rotary program by which a club or district in one country provides humanitarian assistance to a club in another country.

The aid goes to a developing community where the Rotary project will help raise the standard of living and the quality of life.

The ultimate object of WCS is to build goodwill and understanding among the peoples of the world.

Essential Requirements:

- Must fit into one of RI's Areas of Focus
- Must have a well-researched, well-defined community need assessment
- Must have community (beneficiaries) buy-in
- Must have a Host Club in the area where the project will be executed
- Must be sustainable (what happens when Rotary leaves?)

Minimum Project value of \$30,000 – the higher the better

Maximum Project value of \$400,000

NOTE:

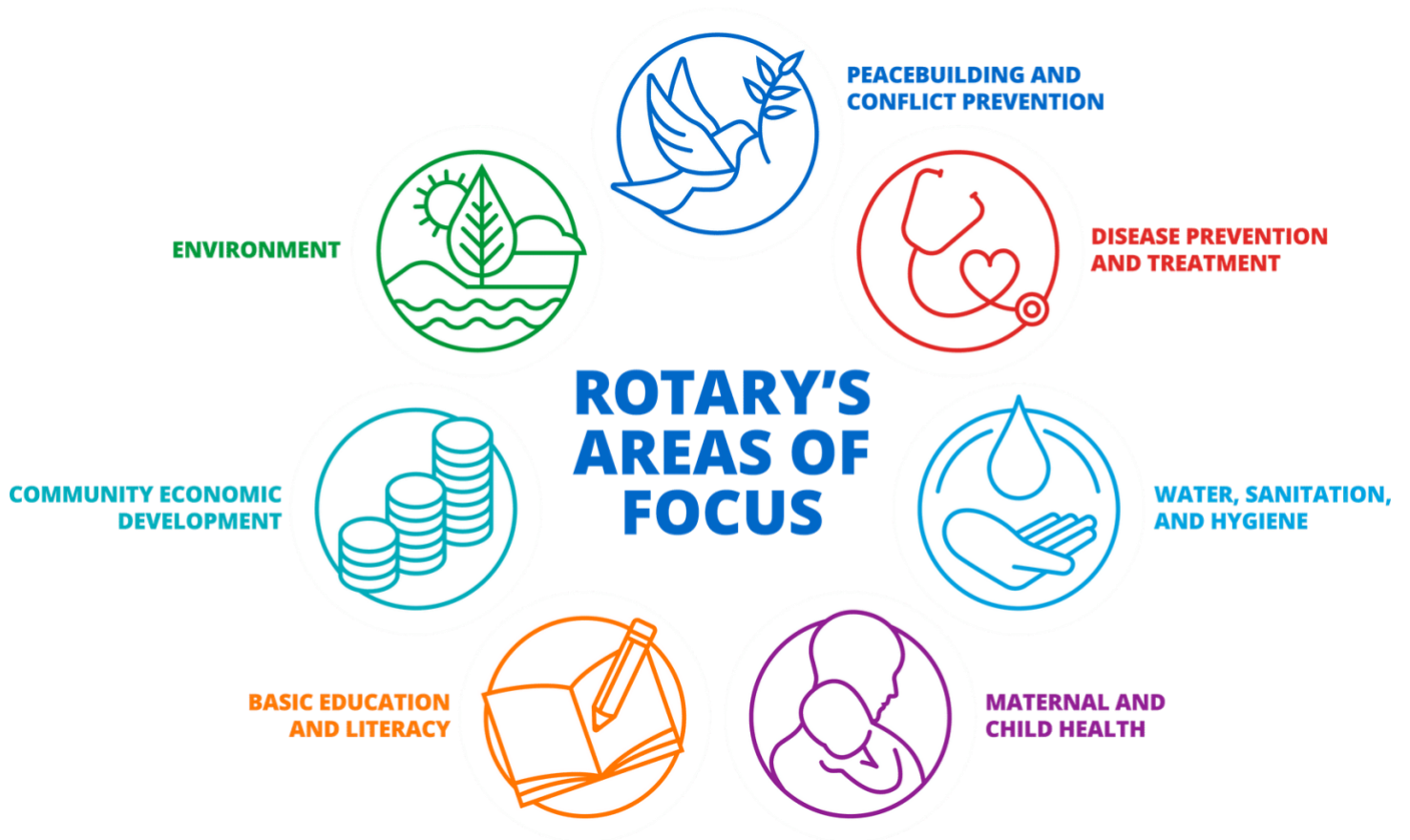
If you are proposing a Global Grant Project for the first time, you must do the following:

1. Have an experienced member as your mentor and a member of your Project Committee
2. Complete the Grants Management online courses, the relevant modules at:

<https://tinyurl.com/p7w99n3h>

(note: you will need to first sign in. Your login & password are the same as ClubRunner)

II. Rotary's Seven Areas of Focus



III. Jargon & Terminology

Project Value

Global Grant Project value is expressed in US dollar amounts and may be 'funded' in a variety of manners. To avoid ambiguity, GG proposals should always be expressed in "project value" amounts.

DDF

District Designated Funds are the 50% portion of total contributions made to the Annual Programs Fund by Rotarians, clubs and others in our district in the Rotary year *three* years prior to the current year.

District 5170 allocates the DDF it receives every year to the Clubs proportionate to what they have contributed to the Annual Fund. Not every district does it this way.

Cupertino Rotary receives their pool of DDF to use on Global Grants (or District Grants) based on the previous three years of contributions to TRF. **Cupertino Rotary prefers to use all of its DDF for Global Grants because TRF will match it 1:0.8 for Global Grant project value funding.**

Not all clubs do.

Want to know who gets how much? District 5170 DDF Allocations:

<https://tinyurl.com/nsxeh984>

Allocated DDF must be used each Rotary year, although exceptions may be granted. Starting in 2019-20, DDF may be carried over into the future with the permission of the Grants Chair or District Foundation Chair. While not advisable for WCS, this change in policy allows a Rotary Club to 'save up' DDF to fund a large project.

TRF

The Rotary Foundation (a charitable fund).

The Rotary Foundation's Annual Fund includes SHARE, the World Fund, and our areas of focus funds. The [Every Rotarian, Every Year](#) initiative asks all members to donate to the Annual Fund each year and take part in at least one Foundation project or program each year.



Donation to Annual Fund **SHARE**

Donation is invested for 3 years; growth supports Foundation operations.



SPENDING DECISIONS SHARED

World Fund
(Trustee discretion)



GLOBAL GRANTS AND PROGRAMS*

District Designated Funds (DDF)
(District discretion)



DISTRICT GRANTS GLOBAL GRANTS

*Includes PolioPlus, Rotary Peace Centers, other districts, and the Endowment Fund (areas of focus)

Max the Match (MtM)

District 5170 administers a pool of Global DDF available for purchase through a program called Max the Match (MtM). It allows purchase of Global DDF at a rate of \$1.25: 1 DDF. Those Global DDFs are in turn matched by the World Fund at 1:0.8 for Global Grants.

In effect, WCS is able to achieve \$1.80 of project value for each \$1.25 spent to purchase Global DDF.

So where does this DDF come from? Many smaller clubs in our district do not use their DDF allocation but make it available for purchase.

CAVEAT: Currently, we are permitted to buy a maximum of 10,000 DDF per Rotary Year

CREF

The Cupertino Rotary Endowment Foundation. A 501 c 3 entity.

Donors (Rotarians and non-Rotarians) may make tax-deductible cash donations to Global Grants by writing checks to CREF. They can either designate their donation for a specific GG or designate the donation as “unrestricted” for use as WCS sees fit.

Cash donations can be directly applied to Global Grants (with CREF essentially writing a check to forward the funds to TRF upon grant approval), however, there is an opportunity to use the donation for a Max the Match

District 5170 Foundation

Tax-deductible donations can be made to the district foundation and designated to specific Global Grants within D5170.

HOWEVER, because Cupertino Rotary has its own Foundation, we do not use the District Foundation account. This foundation exists in part for the benefit of other D5170 Rotary Clubs who do not have their own foundation, allowing donors to make tax-deductible donations.

AOF

Areas Of Focus

IV. Areas of Focus – Key definition



PEACEBUILDING AND CONFLICT PREVENTION

Training, education, and practices related to peacebuilding and conflict prevention through initiatives that help transform conflict in our communities and around the world.



DISEASE PREVENTION AND TREATMENT

Activities that reduce the causes and effects of disease. Projects strengthen the health care system by improving access to and expanding medical services, providing medical equipment, or training health care personnel.



WATER, SANITATION, AND HYGIENE

Activities that encourage the management and protection of freshwater resources and provide universal and equitable access to safe drinking water, sanitation, and hygiene. To empower governments, institutions, and communities to manage their water, sanitation, and hygiene services through environmentally sound, measurable, and sustainable interventions.



MATERNAL AND CHILD HEALTH

Activities and training to improve maternal health and reduce mortality for children under five. Projects strengthen the health care system by improving access to and expanding medical services, providing medical equipment, and training health care personnel.



**BASIC EDUCATION
AND LITERACY**

Activities and training to improve education for all children, and literacy for children and adults.



**COMMUNITY ECONOMIC
DEVELOPMENT**

Investments in people and communities to alleviate poverty, creating measurable and enduring economic improvements in poor and underserved areas.



ENVIRONMENT

Activities that strengthen the conservation and protection of natural resources, advance environmental sustainability, and foster harmony between people and the environment.

Note: Detail AOF Policies can be found here <https://tinyurl.com/4wxmmvx6>

- V. A handy checklist
 - a. Prequalification
 - b. Prerequisites
 - c. Sustainability
 - d. Fund-raising

Preliminary Qualification Checklist for any GG Project Request or Proposal

Qualification	Yes	No	More Info Req'd
Does the project qualify for a GG? (Above \$30K value & significant impact?)			
Does it map well into the guidelines defined within the policies of a particular Area of Focus?			
Prerequisites:			
Has a Community Needs Assessment been done? (<i>On the ground with or by the Host Club</i>)			
Has a Host partner club been identified and qualified? (<i>Check with that District's Grants Coordinator</i>)			
Are the beneficiaries engaged & willing to take ownership?			
Has the Community Needs Assessment Results been published on TRF's form?			
Has Sustainability been adequately addressed?			
Has a preliminary proposal request for WCS consideration been completed? (CR form)			
What is the Fund-raising plan?			
Total Project Value			
Funds raised			
Balance Needed			

Grant Staff Contact Sheet can be downloaded from here: <https://my-cms.rotary.org/en/document/rotary-grants-staff-contact-sheet>