WCS Global Grant Champion Process/Timeline/Forms

1. Regularly attend (at least 50%) monthly WCS committee meetings and support WCS events and programs.

2. Attend Global and District Grant project training. Become familiar with the processes and requirements of project proposals, implementation and completion. Global grant training is available online at: My Rotary "Learning Center": https://learn.rotary.org/members/learn/lp/101/Grant%2520Management%2520Seminar

3. Identify Host Rotary Club partners and potential cooperating organization partners to develop project ideas and conduct community needs assessments.

4. Complete the *Preliminary Proposal for WCS project sponsorship* form; schedule a mentor meeting thru the WCS chair to vet the project for eligibility and sustainability.

5. If this is your first project proposal, enlist an experienced Cupertino Rotarian as a member of the three-person grant committee.

6. Create a draft proposal using TRF's *Global Grant Portal* (or if a District Grant* use the District 5170 application form). If a Global Grant proposal, draft a *Monitoring and Evaluation plan* using the TRF guidelines and *M & E template*s.
*Note: Cupertino Rotary tends to use DDF for Global Grants (vs. District Grants)

7. Request WCS Committee approval to develop and implement a financing plan that combines Cupertino Rotary financing and financing from other Rotary Clubs and sponsors*.
Create and present the minimum CR financing needed to allow the project to go forward. Optional financing plans may be submitted for consideration (such as versions reflecting larger scoped versions of the project.)
Submit a complete proposal package to the WCS chair NLT 10 days before the WCS project review meeting: 1) draft *Global Grant application* PDF; 2) *Monitoring and Evaluation plan*; 3) *Financing plan(s)*.
*Notes: WCS's rule of thumb is contribution of ~30% of the total project value by Host Rotary Club, ~30-50% by Cupertino Rotary. WCS generally contributes smaller amounts when participating only as a GG financial contributor.

8. WCS reviews potential projects at the April meeting. If Cupertino Rotary is under the maximum number of 10 active Global Grants following the project review process, an additional proposal review may be conducted at the

September meeting. By exception, WCS may accept GG proposals any time of the year when under the maximum of 10 active Global Grants.

9. During the WCS project review meeting, present your project, and allow for questions - within a 10 minute time limit. WCS committee members rank projects.

10. The WCS steering committee (SC) meets to review proposal rankings, recommend projects for approval and propose funding. At the following monthly WCS meeting, the SC reports its recommendations for committee consideration and endorsement.

11. With a WCS-endorsed project, work to finalize and complete project financing. Ideas: post project to *matchinggrants.org*, share your proposed project at District 5170 project fair opportunities, post project to "Rotary Ideas" or similar, post on the TRF web site (subject to maximum posting limitations on the site). Consider creating a brochure for use in promoting your project.
As soon as project financing is identified, depending on the determined method(s) for funding the GG, contact a) the WCS-CREF POC to prepare *Form 1,* and b) the WCS Chair to prepare the *DDF Transfer* and or *MtM* form(s).

12. Once TRF communicates approval of the GG (Approval notification comes via email to Champion), complete any paperwork needed to complete funding of the GG. Inform sponsors/donors that unpaid pledges are due, work with the WCS-CREF POC to complete *Form 3 Check Request* to forward donations to TRF and or to D5170 for MtM purchase, as required.

13. Champion monitors GG Progress to completion**.**
Complete the *GG News Form* describing your project, and suggest appropriate milestones for publicizing the project.
Provide updated status for the master WCS 'GG Matrix', report updates at WCS monthly meetings.
Take note of when reports are due and communicate with your Grant Committee to ensure all deadlines are met. Written progress reports are due each year, and a final report is due when the project is completed.
Consider preparing a short presentation on your project to share with others.
Consider organizing a trip to visit the project during its dedication/execution.
Inform the WCS Chair and Co-Chair when the project has completed.