

GLOBAL GRANTS FROM THE BEGINNING: PART 2

Preamble: This is “Part 2” of a response to requests for a step-by-step outline on the planning and implementation of an international service project and Rotary Foundation Global Grant.

Note: Eligible activities for Global Grants include Humanitarian Projects, Vocational Training Teams, and Scholarships. This paper addresses Humanitarian Projects.

*Note: Entries highlighted in **BLUE** are items of importance to the review committee (staff) or suggestions from the writer.*

*Definitions: The **HOST CLUB** is located in the country where the project takes place. The **INTERNATIONAL CLUB** is not located in the country where the project takes place and is usually the lead club to provide financing and support. Global Grants are funded through The Rotary Foundation which will be referred to here as TRF.*

APPLICATION

- At the end of “Global Grants – From the Beginning: Part 1” your application received authorization from all the required club and district officials, then was forwarded to TRF. If the application arrives at TRF complete, approval should be received in approximately 4 weeks.
- TRF staff will review the application and ask for any missing information and for clarifications. The appropriate club official needs to respond in a timely manner.
- A secondary review may be required by TRF.
- After reviews and clarifications are complete, the sponsors will receive notification from TRF.

APPROVAL & PAYMENT

- If your application is approved, all committed funds from clubs, partners, and districts will need to be forwarded to TRF. TRF will then include funding from TRF World Fund and forward the funds to the project’s bank account. Larger projects are usually paid in instalments based on the spending plan in your application.
- You will have to provide bank account information to TRF. This is usually be provided by the Host Club, the club handling the funds.
 - The Rotary Foundation recommends that grant funds be managed by the host sponsor club, unless there is a reasonable business purpose for managing the funds internationally. The sponsor club should maintain a club-controlled bank account that is used solely for receiving and disbursing Foundation grant funds. Each open grant should have its own account. Grants are not intended to produce interest income for clubs, so keep grant funds in a low-interest or non-interest-bearing account. All grant payments will be made directly from this account. A checking account allows for flexibility in making the multiple disbursements that may be needed for grant transactions and ensures that bank statements will be available. The name on the account should identify the club, and two Rotary member signatories (payees) should be required for all transactions. Be sure the signatories on the account do not have any conflicts of interest. Have a succession plan for transferring control of the project bank account in case a signatory becomes unable to perform his or her duties. If account signatories change, be sure to notify your grants officer.

IMPLEMENTATION & REPORTING

- The Host Club will do the “on the ground” work to implement the project plan. You need to keep in touch with the Host Club and ensure that they are reviewing the project plan with their project committee and team. Zoom meetings are useful to accomplish this communication.
- The application will identify targets and measurements. The Host Club should regularly check in with club partners, cooperating organizations, and the community to identify and resolve issues before they threaten the success of your project. Get updates from the Host Club and provide regular updates to your fellow club members.
- Be prepared to assist the Host Club with issues that arise and that may impact the budget or project plan. The Host Club may wish to have you communicate with TRF. Issues may include price changes, inflation, change in supplier, or an extension to the completion date.
- It is important to TRF that you implement the program according to your project plan. However, TRF staff understand that challenges will arise and amendment to the plan may be required. If an amendment is required, communicate this with all those involved and send a request for the amendment to your TRF regional grants officer.
- It's best to have an email list containing the following: all grant sponsors, cooperating organizations, involved community members, club members, and other interested parties. Keep everyone informed of progress, challenges, and solutions throughout the life of your project.
- According to TRF, the host and international sponsors must:
 - Communicate with each other and the benefiting community regularly about the grant-funded project.
 - Contact their regional grants officer as soon as questions arise.
 - Get pre-approval from each other and TRF for any changes to the project's scope or budget.
 - Report to the Foundation every 12 months (for grants paid to clubs and districts in India, sponsors are required to report by each 31 May on all grant activities they carried out through 31 March of that year).
- Monitoring and evaluation on-site will be done by or through the Host Club. Monitoring is the continual process of collecting specific data, and it uses the measures and benchmarks you outlined in your grant application to track the progress of your project. TRF staff will assess your success based on how well the project is achieving its objectives.
- The Host Club, or whoever is controlling the project bank account, should keep the following:
 - All grant correspondence, including:
 - Important email documentation.
 - The community assessment.
 - Any cooperating organization memoranda of understanding.
 - Any additional agreements with beneficiary institutions or groups or implementing partners such as local municipalities or government agencies.
 - Vendor documentation including quotes and contracts.
 - Grant-related documentation.
 - Receipts and invoices.
 - Bank statements and other financial documents.
 - Inventory.
 - Photos.
- All documents required by the club's MOU should be retained in a location that is known and accessible to more than one person.
- POINT TO REMEMBER - Rotary asks for grant reports to ensure good stewardship, but also so that we can show others how we change communities for the better. Submit your reports

every 12 months while the grant is open, and the final report within two months after your project is complete. Include detailed information on your activities, progress, achievements, and outcomes. Submit all reports through the Grant Center.

- POINT TO REMEMBER – Your clubs and districts must remain qualified throughout the grant process. This means having members complete grant qualification or re-qualification courses through the online Rotary Learning Institute and annually having the required members sign MOU and FMP documents.
- If there are funds unspent at the end of the project, the Primary Contacts should deal with the Regional Grants Officer regarding the return of unspent grant funds or permission to spend the funds on additional objectives related to the project.

Good luck with your projects. You are doing valuable international work. If you have questions please contact me at reidbfamily@gmail.com.

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Photo: Rice paddy and the prime source of cooking/cleaning water prior to a Global Grant WASH project.