

Rotary District 5240 Global Grant Policy for Rotary Year 2020-2021

Global Grants are generally governed by the Terms and Conditions prescribed by The Rotary Foundation (TRF) and "A Guide to Global Grants", publication 1000-EN—(319). However; it is necessary to review the provisions of this policy to insure District 5240 compliance prior to submittal and approval for your Global Grant application.

- 1) Prior to making a decision at the Club level to pursue an application for a global grant, and to help facilitate a smooth review process; it is important to contact the District's Global Grant Committee Chair and provide basic information, such as the name of the grant, the partners, and the intended amount of District Designated Funds (DDF) that will be requested. The District Global Grant Committee is responsible to insure that DDF is allocated properly to grants that have a reasonable probability for success.

The Global Grant Committee Chair for 2020-2021 is Chas Wilson (Simi Sunrise); email: cwilson3169@yahoo.com

- 2) It must be noted that global grant applications will not be authorized and submitted to TRF for approval until the Global Grants Committee reviews and approves the request, and is signed off by the DRFC Grants Chair. The DRFC Grants Chair for 2020-2021 is Dave Gore (Goleta Noon); email: davcgor@gmail.com

The District Rotary Foundation Chair will authorize the grant, and along with the District Governor will sign off on the DDF allocation once these checks are met.

- 3) Clubs may submit Global Grant applications only if the club is qualified and certified for the 2020-21 year.
 - a) Clubs become qualified when the 2020-21 club president and one other member in good standing attend a D5240 grant qualification seminar/webinar in 2019-2020 or 2020-21.
 - b) Clubs become certified by submitting the TRF MOU, signed by the current club president, and the current club president-elect. Additionally, incorporated clubs must also submit a club resolution agreeing to the terms of the MOU.

These signed MOU documents must be submitted to DRFC Grants Chair for 2020-2021 Dave Gore (Goleta Noon); email: davcgor@gmail.com

- c) Non-certified clubs may participate in global grants, but they will not be able to submit or be the project sponsoring club.

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4) DDF Allocations

- a) Clubs may request up to **\$20,000** in District Designated Funds (DDF) for a Global Grant.
 - b) Total DDF allocation limits may be modified at the discretion of the DRFCC to meet the needs of the overall D5240 Grants program
 - c) For purposes of a Global Grant Application, DDF will primarily be allocated to District 5240 Clubs that are an International Partner or Project Host for a Global Grant.
 - d) Special DDF allocations must be approved by mutual concurrence with the District Governor and the District Rotary Foundation Chair, and should generally be limited to allocations for Polio Plus, Peace Centers, Vocational Training Teams, and formal Sister District agreements in South Korea and Mexico.
 - e) Smaller DDF allocations may be approved on a dollar for dollar basis with matching cash contributions from D5240 clubs and may be made available solely at the discretion of the District Rotary Foundation Chair. These types of allocations should generally be limited to requests in the 2nd half of the Rotary year, with priority given to those Districts that have supported a Global Grant within District 5240 in the past, but does not limit other requests. Such allocations should be based on the supply of available DDF, with attention given to the amount of activity in the pipeline for larger Global Grants.
 - f) As with larger Global Grants, the District Rotary Foundation Chair and the District Governor will sign off on the DDF allocation once the application checks are met.
- 5) Global grants are defined as having a minimum budget of **\$30,000** and a maximum World Fund award of **\$400,000**. This means that applicants can use a combination of District Designated Funds (DDF), cash, and/or directed gifts and endowment earnings to fund a global grant. The Foundation will provide a 100 percent World Fund match for all DDF contributions.
- 6) A Global Grant Application from District 5240 clubs consists of a combination of Cash, DDF, and World Fund. A minimum cash contribution of **\$10,000** is required from District 5240 clubs and sources from within the District (exceptions in 4d & 4e above).

Clubs may obtain cash from other sources and/or DDF contributions from other Rotary districts. No matter which district contributes DDF, all DDF will be matched by the World Fund, dollar for dollar. Clubs may obtain cash contributions from sources other than Rotarians or Rotary Clubs. These cash funds will not be matched by World Fund or D5240 DDF.

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7) The following (5) scenarios are EXAMPLES of Global Grant Funding. Contact your Global Grants Committee if you need any assistance with figuring out what your club is able to do in terms of funding:

a) Minimum Global Grant (example 1):

	<u>Cash</u>	<u>DDF</u>	<u>Total</u>
D5240 Club(s) and D5240 DDF	\$10,000	\$10,000	\$20,000
TRF Contribution (World Fund)		\$10,000	\$10,000
Total Minimum Grant			\$30,000

b). Global Grant optimizing D5240 DDF (example 2):

	<u>Cash</u>	<u>DDF</u>	<u>Total</u>
D5240 Club(s) and D5240 DDF	\$20,000	\$20,000	\$40,000
TRF Contribution (World Fund)		\$20,000	\$20,000
Total Grant Amount			\$60,000

c) Global Grant for \$100,000 optimizing D5240 DDF (example 3):

	<u>Cash</u>	<u>DDF</u>	<u>Total</u>
D5240 Club(s) and D5240 DDF	\$20,000	\$20,000	\$40,000
CASH Outside of the District			
DDF Outside of the District		\$20,000	\$20,000
TRF Contribution (World Fund)		\$40,000	\$40,000
Total Grant Amount			\$100,000

d) Global Grant for \$100,000 optimizing D5240 DDF (example 4):

	<u>Cash</u>	<u>DDF</u>	<u>Total</u>
D5240 Club(s) and D5240 DDF	\$20,000	\$20,000	\$40,000
CASH Outside of the District	\$40,000		\$40,000
DDF Outside of the District			
TRF Contribution (World Fund)		\$20,000	\$20,000
Total Grant Amount			\$100,000

e) Global Grant for \$100,000 optimizing D5240 DDF (example 5):

	<u>Cash</u>	<u>DDF</u>	<u>Total</u>
D5240 Club(s) and D5240 DDF	\$20,000	\$20,000	\$40,000
CASH Outside of the District	\$15,000		\$15,000
DDF Outside of the District		\$12,500	\$12,500
TRF Contribution (World Fund)		\$32,500	\$32,500
Total Grant Amount			\$100,000

8) Project sponsors must contribute an additional 5% for cash contributions made to The Rotary Foundation, to offset processing and administrative costs. Paul Harris Fellow recognition points will be awarded for the cash contribution, and charitable tax receipts also will reflect that amount.

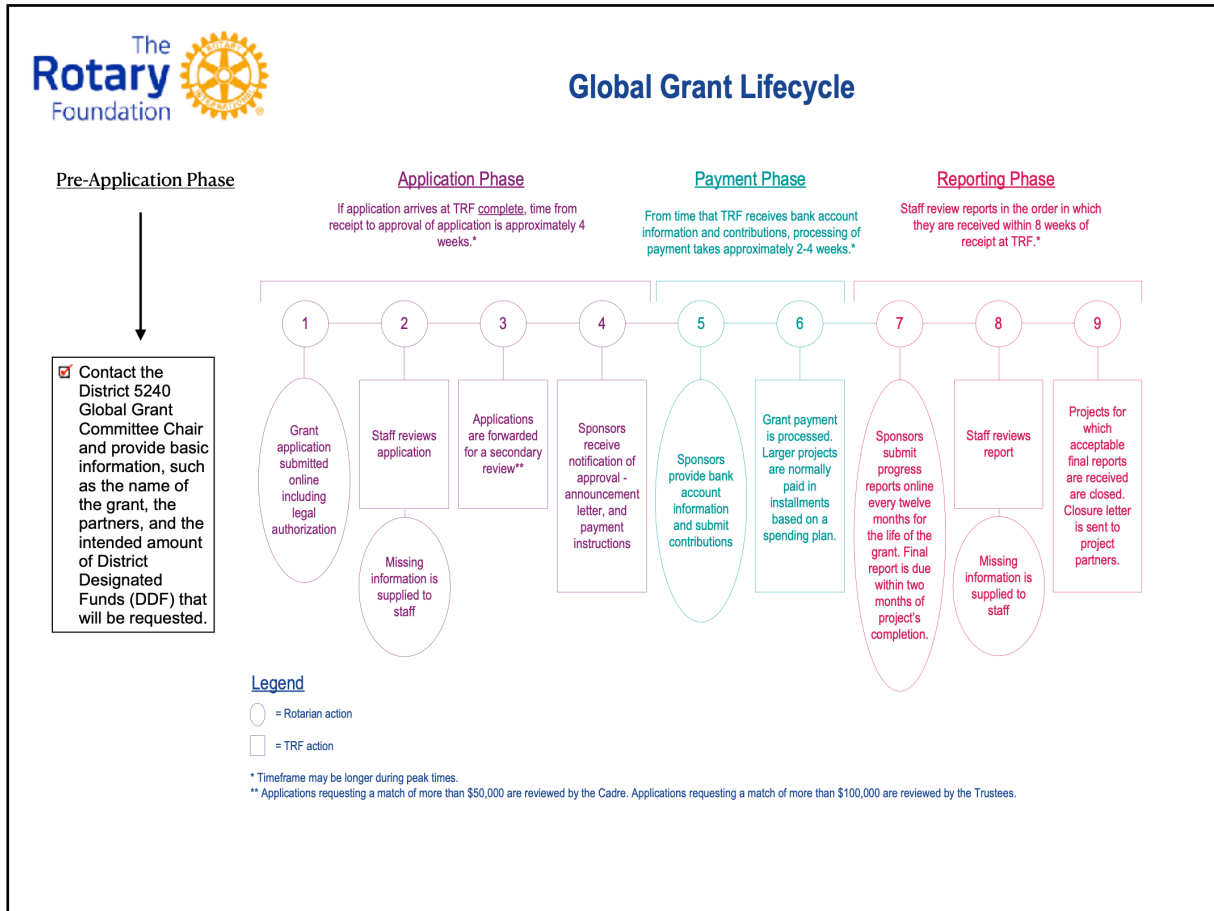
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Cash contributions beyond the DDF matching funds, sent directly to a project's bank account, will not require the 5% processing cost; however such contributions will not generate Paul Harris Fellow recognition points, nor will the Foundation issue tax receipts.

- 9) Global grant cash contribution forms shall be completed & authorized by D5240 Rotary clubs (aside from the host or international club) that pledge cash toward a global grant project. ([Link to Cash Contribution Form](#))
- 10) The District will review and approve Global Grants on an ongoing basis in Rotary Year 2020-21. A Club may "SUBMIT" one Global Grant application in each half of the Rotary year. Granting exceptions to this policy (e.g., allowing a single club to submit more than two global grant applications in a single Rotary year), is authority that may be exercised only by the DRFCC (District Rotary Foundation Committee Chair), and only if there is appropriate DDF available for use. If there is competition for DDF, preference will be given to clubs that have not received DDF for a Rotary Year 2020-21 Global Grant.
- 11) For the 2020-2021 Rotary Year, District 5240 estimates that approximately **\$65,000** of DDF will be available each semiannual period. Any DDF not expended in one period will be rolled to the next.
- 12) The Global Grants Committee will begin reviewing grants as requested, with a goal of completing the review process within 2 weeks. This review process must occur before the grant application is electronically locked and 'SUBMITTED' to TRF for their review and approval. TRF is the final authority for Global Grant Application approval.
- 13) Global grant applications received late in the Rotary year may not be approved by year end. The submitting club is responsible for ensuring that commitments for cash and DDF will still be available should the grant application not be approved until the following Rotary year.
- 14) Global Grants are more complicated than District Grants and require more preparation. In addition, Global Grants may span multiple years and the club needs to ensure that its commitments are reflected in its planning, budgeting and sustainability processes. The Global Grants Committee's function is to assist the Clubs in the District by evaluating Global Grant applications for conformance to TRF requirements. Clubs are encouraged to consult with the Global Grants committee with questions or concerns as the grant is being planned, prior to completing their grant applications.

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- 15) Clubs must obtain approval of the Global Grant Application by the District Global Grants Committee prior to submitting it via the online process to TRF. The process is as follows:
- a) A Global Grant has a host partner and an international partner. A club in District 5240 can be either the host partner or the international partner, depending on the project's location. Either the host partner or the international partner can start the online application. The District 5240 club is responsible for advising its partner club of the District 5240 Global Grant policies and requesting that the grant application not be submitted until it has been approved in accordance with these policies.
 - b) Once the online application is completed or near completion, a copy of the application must be submitted to the District Global Grant Committee. Follow the guidelines on the grant application to create a PDF.
 - c) The Global Grants Committee will support the clubs to ensure that the application, including signed Global Grant cash contribution forms from other clubs is complete and meets both TRF and District requirements. If the Committee has questions regarding the Grant Application, they will be reviewed with the club, which will then have an opportunity to make modifications. The grant application should not be submitted by either club until it has been approved by the District 5240 Global Grants committee.
 - d) The Global Grants Committee will advise the District Grants Subcommittee Chair and the DRFCC that the grant has been recommended for submission to TRF. The DRFCC and District Governor will use that information to determine whether to approve the application and authorize DDF usage.
 - e) If the RI Grant Coordinators have questions regarding the Global Grant, they will direct them to the grant sponsors. During this phase, the D5240 Global Grants Committee only needs to be consulted if there is a change in requested DDF from the District, however, the Committee would appreciate knowledge of any changes requested by TRF, for future reference.
 - f) When the grant is submitted, the club is responsible for ensuring that any changes to the grant are forwarded to the District Grants Subcommittee Chair for incorporation in the D5240 Document Retention system.
- 16) Additional information about Global Grants can be found on the District 5240 website at <https://rotarydistrict5240.org/sitepage/grants-sub-committee>



District 5240 Global Grants Committee, 2020-2021

Global Grants Committee Chair Chas Wilson, Simi Sunrise: cwilson3169@yahoo.com

Anselmo Moreno, Bakersfield Twilight: myrotary1@gmail.com

Gerry Porter, Cambria: gporter909@gmail.com

VACANT POSITION:

Ex-Officio Members

DRFC Grants Subcommittee Chair Dave Gore, Goleta Noontime: davcgor@gmail.com

District Rotary Foundation Committee Chair Frank Ortiz, Santa Maria Breakfast: frankortizdg1213@yahoo.com

2020-21 District Governor Deborah Linden, San Luis Obispo: rotarylinden@gmail.com