**District 5580 World Community Service (WCS) Matching Grant Application Instructions 2020-21**

**What is a Matching Grant?**

Matching Grants support international humanitarian service projects. Rotary clubs or districts from two countries work collaboratively to implement a project.

**Who can apply (Eligibility)?**

Rotary clubs from District 5580 may apply. The Rotary clubs or districts must be in good standing with District 5580 and TRF (The Rotary Foundation). This includes the following:

* being current on the payment of district dues, and
* being current on reporting for previous grants.

In addition, club member support of the Rotary Foundation will be considered in the approval process for grant application.

**Rotaract participation:**

A Rotaract club is eligible to apply as a co-sponsor of a grant request with an eligible Rotary club.  A co- sponsor Rotary club member needs to be one of the three applicants listed as a primary or project contact. A Rotaract Club in the host country could co-host with a Rotary Club or NGO from the host country or the host organization could be a Rotary Club or NGO. Rotaract members traveling to a WCS project site in a host country are required to be accompanied by at least one Rotarian and preferably more. Projects involving Rotaract Clubs as co-sponsors will still require that bank accounts and fund transfers be handled by the co-sponsor Rotary Club. All other WCS requirements remain in place and the Rotary Club co-sponsoring the project is ultimately responsible for ensuring that all requirements (final reporting, submission of receipts, etc.) are adequately fulfilled, although these tasks can be accomplished by the Rotaract Club with the review and approval of the Rotary Club co-sponsor.

**For purposes of completing the application, references to Rotary Club may be substituted with a Rotaract Club if a Rotaract Club is a co-sponsor of the grant request, except as noted above.**

**What are the requirements of a WCS Matching Grant?**

WCS Matching Grants must involve a (host) Rotary Club or Rotary District or established NGO (Non-Governmental Organization) in the project country (host) and a Rotary club (and possibly a partnering Rotaract Club) in District 5580 implementing a humanitarian project. Partners are expected to:

• Maintain communication for the life of the project including semi-annual interim reporting

and a final report. Failure to do so will result in the club(s) returning ALL WCS funds to D5580!

* Establish a committee of at least three Rotarians to oversee the project
* Treat grant funds as a sacred trust
* Maintain clear and accurate accounting

***All projects must*** ***have active Rotarian participation and oversight.***

***Active participation can include:***

* Managing project funds
* Visiting the project site on an as-needed basis
* The international and host partners sharing information via correspondence
* The partners sharing expertise
* Purchasing, shipping, or distributing items purchased
* Publicizing the project to local media and the district

What are the funding limits? (all funds must be in US dollars)

Rotary International District 5580 Rotary clubs may request

* minimum match request is $500, and maximum is $5,000 for a single club
* if partnering with one other D-5580 Rotary club, you may request a match of up to $5000 of each of the individual club contributions, but not exceeding $10,000 total per project.
* if partnering with two **or more** D5580 Rotary Clubs, you may request a match up to $5000 of each of the individual club contributions, but not exceeding $15,000 total per project.

Sponsors may request US$ from The District 5580 WCS Fund. WCS matches $1 for every $1 of a cash contribution from Rotary Clubs or Rotaract Clubs of District 5580, including contributions submitted by Rotary Clubs received from individual supporters / contributors for the proposed project. Each year the WCS collects approximately $40,000 from District members based on an annual member assessment of $15/year. Unused funds roll forward year to year and are available until the WCS funds are depleted.

**What projects are eligible for a WCS Matching Grant?**

Matching Grants fund humanitarian projects that benefit a community in need. Many projects fall within this broad scope; however, certain items/activities are not funded through the program. The chart below gives a general eligibility outline. Because WCS funds are District 5580 funds only, construction projects are allowed. This is about the only variable from Matching Grants of The Rotary Foundation. If you are unsure of the eligibility of your project, please contact the District 5580 Grants Subcommittee Chair. *See grid on following page of examples of projects that are not eligible and eligible.*

|  |  |
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| **Projects that are NOT eligible include:** | **Projects that ARE eligible include:** |
| Establishment of a foundation, permanent  trust, or long-term interest-bearing account | Revolving loans/microcredit  Short-term rent or lease of buildings  Purchase of land or buildings. |
| Salaries for individuals working for  another organization Administrative  expenses for project activities  Operating or administrative expenses  of another organization | *Construction of infrastructure such as service roads, wells, reservoirs, dams, bridges, latrines, toilet blocks, water supplies, and other similar structures.*  *Construction or renovation of any structure in which individuals live, containers, mobile homes, or structures where individuals carry out any type of activity such as manufacturing, processing, maintenance, or storage, including*  *provision of new services or upgrade of facilities*  *Purchase of equipment or appliances*  *Provision of plumbing or electrification inside buildings \*\*\** |
| Domestic travel, International travel |
| Land mine removal |
| Transportation of vaccines or immunizations by hand over national borders |
| Projects already undertaken and in  progress, existing projects, activities  primarily sponsored by a non-Rotary  organization, or projects already completed |
| Purchase and distribution of birth control  devices and ultrasound equipment for use  in sex determination | Short-term and/or contracted labor for project implementation |
| Primary and secondary education, tuition and transportation. |
| Unspecified or cash donations to  beneficiaries or cooperating  organizations | Detailed, itemized expenses Contingencies, miscellaneous expenses |
| Assistance to land mine victims |
| Fundraising activities or expenses  related to Rotary events such as  District conferences, anniversary  celebrations, or entertainment activities  that do not include a humanitarian aspect | Publicity expenses such as newspaper fees, or printing of posters, brochures, or fliers to inform the community of an available service |
| Rotary signage exceeding $500. |
| Projects that support purely religious  functions at churches and other places  of worship | Vaccines and immunizations, if the project is consistent with the criteria, procedures, and policies of the Polio Plus program and World Health Organization |
|  | New Rotary-sponsored projects not already in progress or completed |
| Maternal and prenatal health and education |
| Budgeted and itemized humanitarian goods |
| Humanitarian or service activities benefiting a community in need |
| Secular, nonreligious activities that benefit a community in need |

\*\*\* Projects that include building and/or repairing schools, clinics and other structures are

projects that can be specifically funded by the District 5580 **World Community Service** (***WCS***)

Fund. This is the difference between TRF grants and the WCS grants. The World Community Service fund is meant to be used mainly for structures that would not be funded by TRF grants.

# How to apply

The first step is to contact the District Grants Subcommittee Chair, Tim LeClair at [tleclair@eidebailly.com](mailto:tleclair@eidebailly.com) , to get a mentor assigned. The mentor is to assist with all phases of the project application and reporting. They can help assure the best chance of project approval, successful completion, and proper reporting. Sponsors must complete and submit a District 5580 **World Community Service *Matching Grant Application***. Applications are accepted throughout the year and acted on quarterly by the Grants subcommittee.

**How to submit the application:**

Completed applications **MUST** **be submitted electronically** (and **in English**) to the DGS Chair, ***Tim LeClair*** [***tleclair@eidebailly.com***](mailto:tleclair@eidebailly.com)and the District Secretary, ***Gloria Mink*** [***gloriad5580@outlook.com***](mailto:gloriad5580@outlook.com)

Applications should be submitted single-sided, unbound, and should be typed, not handwritten.

***Additional inclusions needed with the application are:***

1. Letter of Request from the Host Club or NGO
2. A detailed map or GPS coordinates
3. An itemized budget for the project
4. Floor plans or blueprint (if building is involved).
5. Explanation of Land Ownership (if there is a question here).

# District 5580 Grants Subcommittee

The Mentor should be the submitting club’s primary contact for assistance and answering questions. The DGS Chair and Grants Subcommittee is also available to answer questions and to assist with the Grant application and reporting process as needed.

**What are the reporting requirements?**

**Interim** reports are required at least every 6 months for the life of the project. A **Final** report is due within two months of the completion of the project. Project partners must be up to date on all reporting for previous projects, as failure to do so will result in all new applications being returned.

The District 5580 Rotary Club must be in charge of the project from a timing perspective.

From the time the grant is approved, the project must be completed within two years and a final report turned in within two months. Failure to report will result in the club(s) returning All WCS funds to D5580! Any changes in scope must have the written approval of the Grant Committee Chair.

**District 5580 World Community Service (WCS)**

**Matching Grant Application**

***FOR DISTRICT 5580 USE ONLY (once Grant is approved)***

***District Grant No. WCS -***Click here to enter text. ***Date Approved:*** Click here to enter a date.

***District Grant Subcommittee Chair Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

***District Rotary Foundation Chair Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

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**IMPORTANT**: ***A project already started will not be eligible for World Community Service funds.***

**Explanation**: Matching grants support the humanitarian service projects of Rotary Clubs and Districts. In this section, describe in detail the humanitarian need your project will address, the intent of the project including info on the beneficiaries (how the project will benefit the community in need), how the project will be implemented, and how Rotarians (and/or Rotaract members) will be directly involved in the project (involvement is required by both the Host Club and International Partnering Club).

Click here to enter text.

Please provide the name of the project site, the city or village, state or province, and country. Provide a detailed map of the area or provide GPS (Global Positioning Site) coordinates.

List multiple locations, if applicable.

Project Site: Click here to enter text.

City/Village: Click here to enter text.

State/Province: Click here to enter text.

Country: Click here to enter text.

GPS coordinates (if no map is provided): Click here to enter text.

Provide name of ownership of property that structure on which structure is to be built.

Click here to enter text.

Provide a blueprint/detailed drawing of the proposed structure as an attachment.

Provide the estimated length of time needed to complete the project.

Click here to enter text.

Describe how the benefiting community will maintain this structure or project (financing of maintenance, etc.) after grant funding has been fully expended and who will be responsible for sustainability of the structure.

Click here to enter text.

Describe specific activities of the Host and International Partners in implementing the project.

Click here to enter text.

What will the Rotarians who are members of the partner clubs do during the project? Please note that financial support is not considered active involvement. (Refer to ***Matching Grant Application Instructions*** for suggestions.) Click here to enter text.

**Explanation**: The **Host Partner** is the **Rotary Club, Rotary District or NGO in the project country**. A committee of at least **three (3) members of the host Partner** must be established to oversee the project. The primary project contact must be a member of the primary Host Partner identified below.

Note: There may be a partnering Rotaract Club in the host country to work on project planning, project coordination and to provide project labor, but the responsibilities for fulfilling all requirements of the WCS grant rest with the host Rotary Club or NGO.

The committee members must be committed for the duration of the grant process. Please provide the primary address for all committee members, as all D5580 information will be sent to this address. It is **required** that the primary contact (who receives all information from D5580) have an email address to expedite communication.

**Primary Rotary Club, Rotary District or NGO**:

Club: Name and Number and/or NGO: Click here to enter text.

District: Click here to enter text. Country: Click here to enter text.

**Primary Contact**:

Name: Click here to enter text.

Member ID (if known): Click here to enter text.

Club Name: Click here to enter text.

Position: Click here to enter text.

Street Address: Click here to enter text.

City/State or Province/Postal Code: Click here to enter text.

Phone: Click here to enter text. Email Address (**Required):** Click here to enter text.

**Project Contact #2:**

Name: Click here to enter text.

Member ID (if known): Click here to enter text.

Club Name: Click here to enter text.

Position: Click here to enter text.

Street Address: Click here to enter text.

City/State or Province/Postal Code: Click here to enter text.

Phone: Click here to enter text. Email Address (**Required):** Click here to enter text.

**Project Contact #3**:

Name: Click here to enter text.

Member ID (if known): Click here to enter text.

Club Name: Click here to enter text.

Position: Click here to enter text.

Street Address: Click here to enter text.

City/State or Province/Postal Code: Click here to enter text.

Phone: Click here to enter text. Email Address (**Required):** Click here to enter text.

**Explanation**: The **International Partner** is the Club or District outside the project country. In this case, **the International Partner would be a Rotary Club in District 5580**. A committee of at least three (3) Rotarians must be established to oversee the project. The primary contact must be a member of the primary Club identified below. The project committee must be composed of members of the sponsoring Rotary Club(s) for Club-sponsored projects or District-sponsored projects. A Rotaract Club may be an International co-partner to work on project planning, project coordination and to provide project labor, but the responsibilities for fulfilling all requirements of the WCS grant rest with the designated International Partner (District 5580 Rotary Club).

The committee members must be committed for the duration of the grant process. Please provide the primary address for all committee members, as all D5580 information will be sent to this address. It is **required** that the primary contact (who receives all information from D5580) have an email address to expedite communication.

**Primary Club/District**:

Club or District Name: Click here to enter text. Club ID Number: Click here to enter text.

District #: 5580 Country: USA CAN

**Primary Contact**:

Name: Click here to enter text.

Member ID (if known): Click here to enter text.

Club Name: Click here to enter text.

Position: Click here to enter text.

Street Address: Click here to enter text.

City/State or Province/Postal Code: Click here to enter text.

Phone: Click here to enter text. Email Address (**Required):** Click here to enter text.

**Project Contact #2:**

Name: Click here to enter text.

Member ID (if known): Click here to enter text.

Club Name: Click here to enter text.

Position: Click here to enter text.

Street Address: Click here to enter text.

City/State or Province/Postal Code: Click here to enter text.

Phone: Click here to enter text. Email Address (**Required):** Click here to enter text.

**Project Contact #3**:

Name: Click here to enter text.

Member ID (if known): Click here to enter text.

Club Name: Click here to enter text.

Position: Click here to enter text.

Street Address: Click here to enter text.

City/State or Province/Postal Code: Click here to enter text.

Phone: Click here to enter text. Email Address (**Required):** Click here to enter text.

**Explanation**: Official Exchange Rates can be found at: [www.rotary.org/newsroom/downloadcenter/support/rates.html](http://www.rotary.org/newsroom/downloadcenter/support/rates.html). Please use the most recent rate.

NOTE: The host club/district contributions are NOT matched by D5580.

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| SECTION 2: PROJECT BUDGET |
| **Explanation:** For detailed information on what TRF will fund, please see *The Guide to Matching Grants* (144-EN). Official RI exchange rates can be found at [www.rotary.org/en/AboutUs/SiteTools/DownloadLibrary/Pages/ridefault.aspx](http://www.rotary.org/en/AboutUs/SiteTools/DownloadLibrary/Pages/ridefault.aspx) . Please use the most recent rate. Your estimated costs below must include quotes from a bona-fide vendor if costs for items exceed $100. |

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| Budget Item | Name of Supplier | | Amount |
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|  | | Subtotal |  |
|  | | Exchange rate used | **US $1=** |
|  | | Total in U.S. dollars |  |

You must substantiate your project with actual receipts, invoices, and cancelled checks and bank statements when completing the Final Report, or the Report will be returned as incomplete.

* Interim Reports are due every 6 months until completion of the project. The Final Report is due within two months of project completion. Failure to report will result in the club(s) returning ALL WCS funds to D5580!

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| SECTION 3: PROJECT PLANNING |

**Explanation:** Before an application is submitted to D5580, project partners should discuss various planning details. The questions and statements below are a guide to aid project planning. Note that a Rotary Club/District or Rotarian or Rotaract member may not own anything purchased with grant funds.

* Identify who will own equipment and maintain, operate and secure items purchased with grant funds.
* Will training in use and maintenance of technical equipment be provided? If so, who will provide such training?
* Is software necessary to operate any items? If so, has software been provided?
* Indicate what arrangements have been made for customs clearance if items will be purchased and shipped from outside the project country.
* Provision of plumbing and electrification to structures where people live or work may be funded with WCS funds. Have plumbing or electrification for equipment and appliances in existing buildings (hospitals, schools, libraries, orphanages, etc.) been considered and funded?

**Explanation**: Authorizations ensure that both partners are aware of, and interested in, pursuing the described project. By signing below, the current Club Presidents for Club-sponsored projects, and current District Grants Subcommittee Chair for District-sponsored projects, as well as the committee members, agree to the criteria listed and affirm their support of the projects.

All Rotary Clubs, Districts and Rotarians involved in this project are responsible to D5580 for the conduct of the project and its subsequent reporting. The signatures of all involved parties confirm that they understand and accept responsibility for the project. Parties may either sign this page or submit a separate letter of commitment.

**By signing below, we agree to the following**:

* All information contained in this Application is, to the best of our knowledge, true and accurate, and we intend to implement the project as presented in this Application.
* The Club/District agrees to undertake this project as an activity of the Club/District.
* We ensure all cash contributions (as detailed in Project Financing) will be forwarded to the proper bank account after approval of the grant.
* District 5580 may use information contained in this Application to promote the project by various means, such as the D5580 Website, the District Newsletter and other publications of the District.
* The partners agree to share information on the best practices when asked, and D5580 may provide partners’ contact information to other Rotarians who may wish advice on implementing similar projects.
* To the best of my knowledge and believe, except as disclosed herewith, neither I nor any person with whom I have or have had a personal or business relationship, is engaged or intends to engage in benefiting from D5580 grant funds, or has any interest that may represent a potential competing or conflicting interest.
* A conflict of interest is defined as a situation in which a Rotarian, in relationship to an outside organization, is in a position to influence the spending of D5580 grant funds, or influence decisions in ways that could lead directly or indirectly to financial gain for the Rotarian, a business colleague, or his or her family, or give improper advantage to others to the detriment of D5580. (**NOTE**: Any and all exceptions must be explained in an attached statement.)

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| SECTION 4: PROJECT FINANCING |
| **Explanation:** Clearly list all financing in U.S. dollars noting which funds will be contributed in cash and which will be contributed from World Community Service funds (WCS)). The District Rotary Foundation Committee Chair must authorize use of World Community Service Funds.  Project finances must match projected project budget.  **NOTE:** No funds should be spent, and no work should be started on this specific project prior to official Rotary International District 5580 Grants Committee approval. Upon approval, a notice will be sent to the sponsors informing them of approval and providing detailed instructions on how and where to submit their contributions and reports. |

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| **RI District 5580 Rotary clubs or Rotaract Clubs** | **Cash (US$)** | **WCS match (US$)** | **DRFC Chair D-5580** | **DRFC Chair Authorization** | **Dist. Governor D-5580** | **Dist. Governor Authorization** |
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| **Total D-5580 Club & WCS Match Funds** |  |  | **Herb Schmidt** |  | **Bob McLean** |  |
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| **Subtotals, Cash and WCS** |  |  |  |  |  |  |
| **TOTAL Rotary** |  | |  |  |  |  |
| **Additional outside funding** (non-Rotary Club) (not matched by or forwarded to RI District 5580) |  | |  |  |  |  |
| **Total project financing**  **(Must equal Project Budget page Total)** |  | |  |  |  |  |

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| SECTION 5: AUTHORIZATIONS |

**Explanation:**

A ***cooperating organization*** (for example, an NGO) is an organization that is directly involved in the implementation of the project, offering technical expertise and project coordination.

A ***benefiting entity*** is the recipient of goods or services and is not considered a cooperation organization.

If this project involves a cooperating organization (neither a Rotary Club nor the beneficiary of the project), provide the following:

**Name of Organization:** Click here to enter text.

**Street Address:** Click here to enter text.

**City, State/Province, Postal Code, Country:** Click here to enter text.

**Office Phone:** Click here to enter text.

**Email Address:** Click here to enter text.

**Web Address:** Click here to enter text.

**Also, have the project contact provide the Project Contact information as listed above.**

**In addition to the above, the following must be attached**:

* Letter of participation from ***cooperating organization*** that specifically states:
* Its responsibilities and how it will interact with Rotarians.
* The organization’s agreement to cooperate in any financial review of the project.

**Explanation**: Although both partners are responsible for completing the Interim and Final reports, ***D5580 requires that one (1) partner take primary responsibility for submitting the Final Report to D5580. It is recommended that the primary project Club in D5580 takes this responsibility***.

* Interim Reports are due every 6 months until completion of the project. The Final Report is due within two months of project completion. The project is expected to be completed within 2 years from the release of the WCS funds from the District Treasurer to the club. Failure to report will result in the club(s) returning ALL WCS funds to D5580!

**By signing below, our Club accepts Primary Reporting responsibility.**

***Print Name***: Click here to enter text.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Rotary Club Name: Click here to enter text.

District 5580

***Mentor’s Printed Name***: Click here to enter text.

Mentor’s Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***By signing below, we agree to the following:***

* ***All information contained in this application is, to the best of our knowledge, true and accurate, and we intend to implement the project as presented in this application. Any alterations or changes in scope must have the expressed approval of the D5580 Grants Committee Chair.***
* ***The club/district agrees to undertake this project as an activity of the club/district.***
* ***We ensure all cash contributions (as detailed in Project Financing) will be forwarded directly to the project account after RI D-5580 Grants Committee approval of the grant.***
* ***RI D-5580, RI and TRF may use information contained in this application to promote the project by various means such as district publications, The Rotarian, the RI international convention***
* ***The partners agree to share information on best practices when asked, and RI D-5580 and TRF may provide partners’ contact information to other Rotarians who may wish advice on implementing similar projects.***
* ***To the best of my knowledge and belief, except as disclosed herewith, neither I nor any person with whom I have or had a personal or business relationship is engaged, or intends to engage, in benefiting from TRF grant funds or has any interest that may represent a potential competing or conflicting interest. A conflict of interest is defined as a situation in which a Rotarian, in relationship to an outside organization, is in a position to influence the spending of TRF grant funds, or influence decisions in ways that could lead directly or indirectly to financial gain for the Rotarian, a business colleague, or his or her family, or give improper advantage to others to the detriment of TRF. (NOTE: Any and all exceptions must be explained in an attached statement.)***

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| **Primary Contact (Host Partner Outside RI D-5580)** | | **Primary Contact (RI District 5580)** | |
| Name |  | Name |  |
| Signature |  | Signature |  |
| Date |  | Date |  |
| **Project Contact #2** | | **Project Contact #2** | |
| Name |  | Name |  |
| Signature |  | Signature |  |
| Date |  | Date |  |
| **Project Contact #3** | | **Project Contact #3** | |
| Name |  | Name |  |
| Signature |  | Signature |  |
| Date |  | Date |  |

***NOTE: To select a box, double click on it. Then, from the sub-menu select checked or not checked then click on Okay.***

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| **Host Partner (Outside RI District 5580)** | | | **Rotary International Partner (District 5580)** | | |
|  | Club president 2020-21 (club-sponsored)  District grants subcommittee chair (district-sponsored) | |  | Club president 2020-21 (club-sponsored)  District grants subcommittee chair (district-sponsored) | |
| Name | |  | Name | |  |
| Title | |  | Title | |  |
| Rotary Club | |  | Rotary Club | |  |
| District # | |  | District # | | **5580** |
| Signature | |  | Signature | |  |
| Date | |  | Date | |  |

***Before submitting your WCS Matching Grant Application, please take a moment to review this checklist.***

Does the project meet all grant policies and guidelines?

Does the project description clearly state how the project will assist those in need?

Are the activities of the host and international partners clearly explained?

Rotarians will be actively involved in the project?

Have both the host and international partners created committees to oversee the project?

Are the project contacts correctly listed on the Application with their complete contact information?

Is a detailed, itemized budget included in the Application?

Is ownership of the property on which the structure will be located clearly stated?

Is a blueprint/detailed drawing of the structure included?

Are all partner contributions listed in the application, noting which are from the WCS fund?

Have the Club Presidents from the host and international partners provided authorizing signatures?

Has the assigned D5580 Mentor signed off with their approval?

Do you understand the financial, interim, and Final reporting requirements?

**If a cooperating organization is involved, please make sure the following letter is included with the Application:**

* Letter from the organization specifically stating its responsibilities, how it will interact with Rotarians, and agreeing to cooperate in any financial review of the project.

**\*\*\* Has the D5580 Grants Subcommittee assigned Mentor certified that the Application is complete and eligible?**

**\*\*\* Have the partners made copies of all documents for their files prior to submitting them to D5580?**

**\*\*\* Completed Applications should be emailed to both of the following:**

* District 5580 Executive Secretary: ***Gloria Mink*** [***gloriad5580@outlook.com***](mailto:gloriad5580@outlook.com)
* District Grants Subcommittee Chair: ***Tim LeClair*** [***TLeclair@eidebailly.com***](mailto:TLeclair@eidebailly.com)