



# Global Grant Essentials

## District 5440



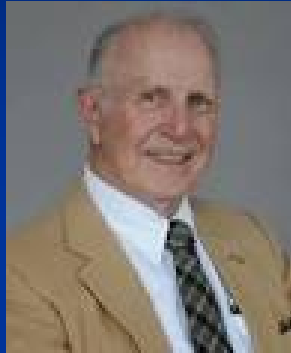
Be a gift to the world

# Introductions



Jim  
Epstein

Fort Collins  
Rotary Club



Alan  
Ashbaugh

Fort Collins  
Rotary Club



John Trone

Fort Collins  
Rotary Club  
Satellite

# Purpose of this training

To share experiences with global grants that will save you time and help your projects be more successful.



# Global Grant Musts

- Must be for one of the six areas of focus
- Must proceed through the application process within the time limits specified
- Must have experience with a reliable partners in the host country
- Must have a bigger purpose than supplying materials and it must meet an identified community need
- Must have goals that have measureable impact
- Must have funding partners and ask for at least \$15,000 from the Foundation
- Must set up separate bank account and keep adequate financial records
- Must be sustainable

# Six areas of focus

Even if your project covers more than one area of focus, only select one or you will have to track and report on all areas of focus selected.

## AREAS OF FOCUS

Projects that receive Global Grant funds from The Rotary Foundation should fall under at least one of the following:



Peace and conflict prevention/resolution



Disease prevention and treatment



Water and sanitation



Maternal and child health



Basic education and literacy



Economic and community development

# Requesting district funds

The screenshot shows a web browser window with the address bar displaying [www.matchinggrants.org](http://www.matchinggrants.org). The page features the Rotary International logo and a banner with the text "Developed by District 5340 for use by the entire Rotary world". Below the banner is a navigation menu with links: Global Grants | District Grants | Legacy Matching Grants | Help | About This Site | Contact Us. A large blue banner reads "Welcome to the Rotary Grants Website!". Underneath, a yellow box says "Select one of the Website Sections". Two large buttons are shown: "Global Grants" with a globe icon and "District Grants" with a house icon. Both buttons have a red "Enter" label and a hand cursor icon. A green double-headed arrow connects the two buttons. The Windows taskbar at the bottom shows the date and time as 12:30 PM on 2/16/2016.

Rotary Grants Website

Developed by District 5340  
for use by the entire Rotary world

Global Grants | District Grants | Legacy Matching Grants | Help | About This Site | Contact Us

Welcome to the Rotary Grants Website!

Select one of the Website Sections

**Global Grants**

**District Grants**

Enter

Global Grants

District Grants

To request district fund for your global grant, go to the [matchinggrants.org](http://matchinggrants.org) web site and click on Global Grants

# Requesting district funds

Rotary Global Grants

www.matchinggrants.org/global/edit.cgi

Cancel Reset Save

### Submit a New Project

Project Title

Rotary Year

Region  Country  Location

Areas of Focus (Check all that apply)

☐ Peace and conflict prevention/resolution ☐ Disease prevention and treatment

☐ Water and sanitation ☐ Maternal and child health

☐ Basic education and literacy ☐ Economic and community development

Project Description: You should include what needs have been identified, how the project will meet those needs, and the timeline for your project. Please specify what the project funds will be used for and how club members will be involved.

### Primary Host Partner

District Number  Rotary Club of

Contact Name  Email

Amount contributed by Club in Project Country (if any)

Amount contributed by District in Project Country (if any)

### Primary International Partner

This section is optional. Fill this section only if you have an International Partner (fully pledged or partially pledged). Leave blank otherwise.

District Number  Rotary Club of

Contact Name  Email

Amount contributed by International Club (if any)

After you click on Submit Project, you will see this screen to fill in the information on your project.



# Requesting district funds

Rotary Global Grants

www.matchinggrants.org/global/admin.cgi?project=1097

Developed by District 5340 for use by the entire Rotary world

My Account | Search | Contact Us

Main List | Submit Project | Pledge Support | Help | About This Site | District Grants | Matching Grants

G-1097 Test Global Grant Back to Project

Description Financing Documents Photos History Logs

**Update Project Information**

Click the button on the right to make changes to the basic project information. [Edit Project Page](#)

Print Online Proposal Form

We recommend that you use the online application form on this website to prepare for the approval process with The Rotary Foundation and to provide detailed information to the District leadership for DDF approval. Click on the "Fill Online Form" orange icon on the right to fill the proposal information.

**Fill Online Form**

For official information about the project status, please contact the staff at The Rotary Foundation. The official application process takes place on the TRF website. It is possible that this website might not display the latest project information.

**Project Status Information**

Your project is "Proposed". Your project needs to be reviewed by the website administrator to validate its content. You will be notified by email when your project is published. In the meantime you can use these administrative pages to add some content for your project description.

**Administrator:** Please review the project and click the "Publish" button on the right to release the project on the website main list. [\[Publish\]](#)

In addition to the basic project information, click on Fill Online Form to submit the detailed information on your project.



# Reliable Partners

- For a global grant you need to have a Rotary club partner in the host country but this is not enough
- You need partners that understands the beneficiaries and can manage the project
  - Host Rotary club members
  - Cooperating organization
  - Rotary Community Corps
- If you don't have experience with this host Rotary club do a district grant with them first
- Members of your club should visit the project site

# Bigger Purpose & Community Need

Global grants must have a bigger purpose than just providing materials and equipment, they must be driven by a real community need understood by Rotarians and others doing a community assessment.

For example, instead of focusing on supplying equipment to a school, focus on producing better educated children by including teacher training along with school supplies.

# Goals and Measureable Impact

- Specific goals must be identified such as:
  - To train 25 teachers
  - To increase the number of students attending school
- The number of direct beneficiaries must be identified
- A method of collection of information must be put in place
- You can hire an external agency to collect and analyze the data and include this in the budget.
- An evaluation of the results must be conducted

# Funding partners

- A global grant must ask for at least \$15,000 from the foundation. Typical for district 5440 this is:
  - At least \$10,000 from participating Rotary clubs
  - At least \$10,000 from participating Rotary districts
- Finding Rotary club partners
  - The district will help you find clubs within the district that want to partner on global grants
  - You can use [matchinggrants.org](http://matchinggrants.org) to find clubs outside of the district to partner with.
- At least 30% of the funds coming from Rotary clubs must come from the international clubs.

# Bank account and financial records

- A separate bank account must be set up to receive the funds from the Foundation
  - This can be in the host country if you have confidence and experience that they will follow the Rotary guidelines
  - If you do not have experience with the host club, set this bank account up in your bank and send them the funding one step at a time.
- Financial records
  - Keep bank transaction records
  - Keep receipts of all purchases or invoices and copies of the checks used to pay the invoices

# Sustainability

- Built local capacity by
  - Training local people
- Establish long lasting effects by
  - Establishing groups that will continue on after the project is completed to monitor results and make improvements.
- Maintain strong community support by
  - Involving the local Rotary club and community members during the entire project in both planning, execution and follow up.



# Summary

- If you have not done a global grant before, become a committee member on another club's global grant to learn the process
- Get help throughout the process
  - District 5440 grants committee representative
  - Rotary Foundation Regional Coordinator
- Communicate frequently with your partners during the project
- Maintain good financial records



# Next steps

## global grant training

- After watching this video, watch the three other videos on how to fill out a global grant application online.
- For further questions, contact your district 5440 grants committee representative. You can find out who your grants committee representative is at [www.rotary5440.org](http://www.rotary5440.org) under Grants/Scholarships by clicking on Grant Committee Members Contact Info

# Resources

Visit the Rotary International site at:

<https://www.rotary.org/myrotary/en/take-action/apply-grants/global-grants>

Read the Terms and Conditions for Rotary Grants available at [www.rotary5440.org](http://www.rotary5440.org) under Grants/Scholarships