

Rotary District 5870 Global Grant Policy

Rotary Year 2018-19

1. District 5870 is eligible to receive Global Grant funds for Rotary Year 2018-19 in the amount of **\$117,685**. The planned allocation of these funds will provide:
 - a. Humanitarian Global Grant Projects = **\$101,685** (86.4%)
 - b. 1 x \$15,000 Global Grant Scholarships = **\$15,000** (12.7%)
 - c. Global Grant in honor of Sam F. Oworu = **\$1,000** (0.9%)
2. The Rotary Foundation (TRF) humanitarian Global Grants are intended to support large international projects that have high-impact outcomes in one or more of the six Areas of Focus (AOF) and have a long-term impact.
3. In addition:
 - a. Projects must be sustainable and their outcomes measurable.
 - b. Activities should stem from real community needs. **Community needs assessment tools** are available from TRF to help identify community needs.
 - c. Global grants must be sponsored by two Rotary clubs or districts: a **primary host partner** in the country where the activity takes place, and a **primary international partner** outside the country. If you are proposing a project that will take place outside the United States, your club is the primary international partner.
 - d. Both the primary host partner and the primary international partner must be actively involved in the planning and implementing of all global grants. This includes maintaining communication and developing plans for the shared responsibilities in all of the grant's stages.
4. Under the TRF Global Grant policy, the minimum grant request for any project is **\$15,000**. This means that the combined contribution from the partner clubs and their Districts must be such as to generate a minimum of \$15,000 from TRF keeping in mind that:
 - a. **District Designated Funds** (DDF) are matched **100%** by TRF.
 - b. **Cash** contributions are matched **50%** by TRF.
 - c. A 5% administration fee will be assessed by TRF on all cash contributions paid to TRF. However, clubs can avoid paying this fee by contributing directly to the project account.
5. DDF for club-sponsored Global Grant projects will be allocated by the District's **Global Grant Selection Committee** (the "Committee") based upon (1) the merits of the grant proposal **and** (2) the Annual Fund per capita giving history of the partner clubs. At its discretion, the Committee

may fund the entire request, a part of the request, or decline to provide any funding. Grant proposals **must** be flexible enough accommodate less than full funding.

6. To receive DDF funding for a Global Grant project, your club **must be qualified**. For a club to be qualified:

- a. Two members of the club – one of whom is the Club President for 2018-19, and the other is the President-elect who will be Club President in 2019-20 – must sign the Club MOU.
- b. Two members (one of whom is the Club President for 2018-19 must have attended a **Grant Management Training Seminar** (GMTS).

Note: GMTS is an annual requirement. Members who attended a training session in calendar year 2017 are eligible to attend a 1-hour refresher session this year. All others must attend the full 3-hour training.

- 1) A 3-hour GMTS will be provided to Presidents-elect on Sunday, **March 4, 2018** at Lone Star P.E.T.S.
- 2) Additional GMTS sessions will be held on **March 24, 2018** (in Georgetown), **April 28, 2018** (in Temple), and **May 26, 2018** (in Georgetown). These will have both 3-hour and 1-hour refresher training.
- 3) An additional 1-hour GMTS refresher training session will be held at the 2018 District Assembly on **April 14, 2018**.

- c. The club must be current on all RI and District Dues.
- d. The club must demonstrate fiscal responsibility by presenting proof that they filed the appropriate Form 990 as required by the U.S. Internal Revenue Service.
- e. The club must be current on all TRF grant reporting.

7. Clubs may submit more than one Global Grant proposal for funding consideration. However, one of these proposals **must** be designated as the **primary** (or number one) proposal.

8. The Committee will consider funding grants in the following order:

- a. Primary (or number one) proposals from clubs who will be serving as a Primary Partner (either Host or International).
- b. Secondary proposals from clubs who will be serving as a Primary Partner (either Host or International).
- c. Proposals from clubs who will be serving as a Contributing Partner.

NOTE: Funding for proposals in this category will be restricted to a maximum of **\$5,000** per proposal, and will require that the proposing club pledge make a cash contribution **in an amount equal to not less than 50%** of the requested DDF.

9. Clubs submitting a Global Grant proposal for funding consideration **must**:
- a. Expand the impact of their humanitarian project by partnering with a minimum of **four** other **District 5870** clubs in a single, joint project that will be larger, have a broader and more lasting impact than the grants done prior to the New Grants Model. The intent of this to ensure that a large number of District Rotarians participate in Global Grants.
NOTE: This requirement does not pertain to Vocational Training Team grants.
 - 1) One of these clubs will be designated as the primary partner, the other four as contributing partners. The primary partner will be responsible for the conduct of the grant, from developing the proposal through submission of the final report.
 - 2) Clubs are also encouraged to partner with outside, third-party (cooperating) organizations to expand the impact of the projects with the expressed understanding that all projects funded by a Global Grant must be proposed, managed and directed by Rotarians.
 - b. Have a solid understanding of the Global Grant process, their club's responsibilities, and have club members who are willing and able to take responsibility for monitoring the grant over its entire lifecycle which could extend several years and involve multiple club boards.
 - c. Ensure that project meets the funding guidelines and retractions outlined in The Rotary Foundation Areas of Focus Policy Statements. This document is available on the district website and on MyRotary.org.
10. Clubs applying for a Global Grant are strongly encouraged to confirm that their international partner club is both (1) in compliance with all TRF reporting obligations on existing grants, **and** (2) has been qualified by their district to participate in New Grant Model grants. In the past, clubs have spent considerable time and effort working on Grant proposals only to find that their proposed partner club is under suspension by TRF. A simple email to the TRF staff member responsible for the project country will answer that question; alternately, you can contact the District Grants Subcommittee chair for confirmation.
11. To be considered for funding in Rotary Year 2018-19, clubs **must** upload their grant proposal(s) into the **TRF Grants Application Tool** not later than **September 30, 2018**. This tool is accessed via MyRotary on the Rotary International website by clicking on The Rotary Foundation link. ***Grants that have not been input by this date will not be considered for funding this year.***

NOTE: While we understand that you may not have all the i's dotted and t's crossed by September 30, it's important to understand that all grants operate on a two-year cycle – a preparation year and an execution year. If you are looking for District funding in 2018-19, you're should be in the execution year and we expect that your planning should be very close to finished. Therefore, funds will be allocated by the

Committee with the expectation that the grant is in “Submit” status not later than **June 30, 2019**. After this date, the funding for your grant will be withdrawn, and you will be required to present the grant again at the next allocation meeting.

12. Clubs will be expected to brief their grant proposal(s) to the Committee on **October 13, 2018** for consideration. ***There is no alternate date for this briefing.***

- a. Clubs are free to structure this presentation as they see fit. In the past, some clubs have shown videos, while others have chosen to use PowerPoint presentations and/or handouts. Regardless of the method chosen, however, the committee is expecting to hear a clear articulation concerning:
 - 1) What the project is intended to do
 - 2) Where the project going to be done
 - 3) Why the project is important
 - 4) How much the project will cost in total
 - 5) How much DDF funding you’re asking the district to provide
 - 6) How many partner clubs have you recruited to support the project
- b. In addressing these points, clubs should include the following:
 - 1) **Description**. Discuss what the project is intended to do, where it will be done, show that the project addresses real needs that have been identified by the host community, and identify the primary host partner club.
 - 2) **Scalability**. Show how the project can be either scaled up or down depending on the availability of funding.
 - 3) **Sustainability**. Show how the project will continue after the grant funding has been expended.
 - 4) **Measurability**. Show what measures of effectiveness will be used to determine whether the project has achieved its goal).
 - 5) **Participation**. Discuss how each partner club will participate in the grant project.
 - 6) **Funding**. Provide a pro forma project budget that substantiates the funding request.

13. The Committee will be comprised of the District Governor, District Rotary Foundation Committee Chair, District Grants Subcommittee Chair, District Stewardship Subcommittee Chair, and the District Governor-elect. The District Governor-nominee may sit-in as a non-voting member.

14. Clubs that receive District funding for a Global Grant will be required to submit copies of their (1) **Financial Management Plan**, (2) **Banking Succession Plan**, and (3) **set up a dedicated bank**

account for project funds (if they are going to directly manage these funds) **before** the grant will be submitted to TRF for final approval.

Please feel free to contact District Grants Subcommittee Chair Abbey Tootle (atootle@austincrc.org) with any questions you might have with respect to Global Grants.