

Rotary District 5870 Global Grant Policy

Rotary Year 2024-25

1. District 5870 is eligible to receive Global Grant funds for Rotary Year 20 24-25 in the amount of **\$161,785**. The planned allocation of these funds will provide:
 - a. Global Grant Humanitarian Projects = **\$91,784** (56.7%)
 - b. Global Grant Scholarships (3 x \$16,667) = **\$50,001** (30.9%)
 - c. PolioPlus = **\$20,000** (12.4%)
 2. To receive DDF funding for a Global Grant humanitarian project or a Global Grant Scholarship, your club **must be qualified**. For a club to be qualified:
 - a. Submit the Memorandum of Understanding: Two members of the club (one of whom is the incoming president) must sign the MOU.
 - b. Attend Grant Management Training:
 - (1) Two members (one of whom is the incoming president) must attend a Grant Management Training Seminar (GMTS).
 - (2) The following GMTS sessions have been scheduled:
 - (a) **January 13, 2024 (Virtual via Zoom) – both sessions (1-hour and 3-hour)**
 - (b) **February 3, 2024 (Virtual via Zoom) – both sessions**
 - (c) **March 3, 2024 (at Lone Star P.E.T.S.) – GMTS full session only**
 - (d) **April 6, 2024 (at District Assembly) – GMTS Renewal (1 hour session) only**
 - (e) **April 20, 2024 (Virtual via Zoom) – both sessions**
- Note:** *Grant Management Training is an annual requirement. If a member attended training in the calendar year 2023, he or she is eligible to attend the 1-hour refresher class in 2024. If not, that person must attend the full 3-hour class.*
- c. Pay both RI and District Dues: The club must be current on all RI and District Dues at the time the funds are disbursed.
 - d. Submit their IRS Form 990: The club must demonstrate fiscal responsibility by presenting proof that they filed an income tax return for the Rotary Year ending **June 30, 2023** as required by the U.S. Internal Revenue Service.
 - e. Be Current on Grant Reporting: The club must be current on all TRF grant reporting, and must have closed any open DAP Grants it has received before it is eligible to apply for another district grant. Timely reporting and good stewardship of previous grants will be considered in determining your club's DAP Grant award.
 - f. Set fundraising Goals for both the Annual Fund and PolioPlus: The club must establish realistic yet challenging Annual Fund and PolioPlus goals and enter them into Rotary Club Central.

3. Global Grant Humanitarian Projects:

a. The Rotary Foundation (TRF) humanitarian Global Grants are intended to support large international projects that have high-impact, long-term outcomes in one or more of the seven Areas of Focus (AOF).

b. In addition:

(1) Projects must be sustainable and their outcomes measurable.

(2) Activities should stem from real community needs. **Community needs assessment tools** are available from TRF to help identify community needs and is mandatory for global grants.

(3) Global grants must be sponsored by two Rotary clubs or districts: a **primary host partner** in the country where the grant 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.

(4) 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.

c. Global Grant Financing:

(1) The minimum budget size of a Global Grant is **\$30,000**. As of July 1, 2020, there is no longer a minimum World Fund match required for global grants. This means that the combined contribution from the partner clubs and their Districts, plus whatever World Fund match is requested, must meet the \$30,000 minimum requirement.

Note: *As of July 1, 2021, the maximum World Fund match of DDF was reduced from 100% to 80% and the match for cash contributions was eliminated.*

(2) In computing the funding for your grant, please keep in mind that:

(a) **District Designated Funds** (DDF) are matched **80%** (i.e., 1:0.8) by TRF.

(b) **Cash** contributions are no longer matched 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.

(d) The international partner(s) must contribute a minimum of **15%** of the grants funding. The 15% foreign financing calculation is based on both the cash and DDF being contributed toward the grant. The World Fund match is not factored in.

(3) TRF is encouraging grant sponsors to finance their global grants without a World Fund match. Sponsors can use DDF, cash, directed gifts, or endowment earnings to make up the minimum \$30,000 budget that they need for their grant activity.

For example, under the revised policy, grant financing might look like this:

\$10,000 DDF + \$8,000 World Fund + \$12,000 cash contributions = \$30,000 global grant

or

\$10,000 DDF + \$0 World Fund + \$20,000 cash contributions = \$30,000 global grant

- d. DDF for club-sponsored Global Grant projects will be allocated by the District's **Global Grant Review and 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 to accommodate less than full funding.
- e. 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.
- f. The Committee will consider funding grants in the following order:
 - (1) **Primary** (or number one) proposals from clubs who will be serving as a **Primary Partner** (either Host or International).
 - (2) **Secondary** proposals from clubs who will be serving as a **Primary Partner** (either Host or International).
 - (3) Proposals from clubs who will be serving as a **Contributing Partner**.

NOTE: *Funding for proposals from clubs who will be serving as a Contributing Partner only will be restricted to a maximum of **\$5,000** DDF per proposal, and the proposing club will be required to pledge a cash contribution **in an amount equal to not less than 50%** of the requested DDF.*

Clubs submitting a Global Grant proposal for funding consideration **must**:

- (1) 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 is to ensure that a large number of District Rotarians participate in Global Grants.

NOTE: *This requirement does not pertain to Vocational Training Team grants.*

- (a) 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.
- (b) 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.

- (2) 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.
- (3) Ensure that the project meets the funding guidelines and restrictions outlined in The Rotary Foundation Areas of Focus Policy Statements. This document is available on the district website and on MyRotary.org.

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 Global 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.

To be considered for funding in Rotary Year 2024-25, clubs **must** upload their grant proposal(s) into the **Rotary Grant Center** not later than **September 30, 2024**. The Rotary Grant Center is accessed via My Rotary 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 2024-25, you 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 “Submitted” status not later than **June 30, 2025**. 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.*

Clubs will be expected to brief their grant proposal(s) to the Committee on **October 12, 2024** for consideration. **There is no alternate date for this briefing.**

- (1) 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.
- (2) Regardless of the method chosen, the committee is expecting to hear a clear articulation concerning:
 - (a) What is the project intended to do?
 - (b) Where is the project going to be done?
 - (c) Why is the project important?

- (d) How much will the project cost in total?
 - (e) How much DDF funding are you asking the district to provide?
 - (f) How many partner clubs have you recruited to support the project?
- (3) In addressing these points, clubs should include the following:
- (a) **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.
 - (b) **Scalability.** Show how the project can be either scaled up or down depending on the availability of funding.
 - (c) **Sustainability.** Show how the project will continue after the grant funding has been expended.
 - (d) **Measurability.** Show what measures of effectiveness will be used to determine whether the project has achieved its goal).
 - (e) **Participation.** Discuss how each partner club will participate in the grant project.
 - (f) **Funding.** Provide a pro forma project budget that substantiates the funding request.

The Committee is comprised of the:

- (1) District Governor,
- (2) District Rotary Foundation Committee Chair,
- (3) District Grants Subcommittee Chair,
- (4) District Global Grant Coordinator,
- (5) District Governor-elect.

The District Governor-nominee may sit-in as a non-voting member.

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 PDG Ellison Crider ellisoncrider@gmail.com or Global Grant Coordinator Jeff Matera jmatera@zfhlc.com with any questions you might have with respect to Global Grants.

4. **Global Grant Scholarships:**

- a. Global Grant Scholarships fund **graduate-level education** for career-minded professionals in countries outside the United States. Programs of study must be in a discipline related to one or more of Rotary's Seven Areas of Focus. They can be no less than one academic year but not longer than four

years, thereby enabling clubs to fund an entire degree program. The objective of the Global Grant Scholarship program is to forge a link between Rotary and future skilled professionals.

- b. Each Global Grant scholarship is at least **\$30,000**, funded entirely by District Designated Funds (DDF) and the World Fund, and can be used to cover airfare, living expenses and tuition.
- c. The Scholar may not be:
 - (1) A Rotarian
 - (2) An employee of a club, district, or other Rotary entity, or of Rotary International
 - (3) The spouse, a lineal descendant (child or grandchild by blood or stepchild legally adopted or not), the spouse of a lineal descendant, or an ancestor (parent or grandparent by blood) of any person in the foregoing two categories.
- d. Global Grant Scholars are expected to participate in Rotary activities, and their sponsoring Rotary Clubs (international and host) should provide opportunities for them to do so. To reinforce this requirement, District 5870 has retained the Ambassadorial nature of the scholarship program.
- e. The district has published a District **Global Grant Scholarship Handbook** that contains detailed information about how to submit a scholarship application. A copy can be downloaded from the District website. www.rotarydistrict5870.org
- f. The sponsoring Rotary Club is responsible for all scholarship management. Rotary International will send the scholarship funding to your club and it will be your responsibility to disburse them in accordance with the **Terms and Conditions for Rotary Foundation Global Grants**.
- g. Clubs sponsoring a Global Grant Scholarship candidate are required to identify one Rotarian who will serve as **Scholar Counselor** to provide oversight and management of scholarship funds, and who will serve as a contact for District 5870. **Scholar Counselor must be current with Grant Management Training.**
- h. The **Global Grant Scholarship Application Form** must be submitted to the District Global Grant Scholarship Coordinator not later than **November 4, 2024**. A copy can be downloaded from the District website www.rotarydistrict5870.org. Applications received after this date may be returned without action.
- i. The District Global Grant Scholarship Committee will interview scholarship applicants on **December 14, 2024**. **There is no alternate date for this interview, and candidates are required to attend this meeting which will be held over electronic media, such as Zoom.** Sponsoring Rotary Club's Scholar Counselors are highly encouraged to accompany their candidates.
- j. Successful Global Grant Scholarship candidates must have their TRF scholarship application in "Submitted" status not later than **June 30, 2025**.

Contact District Global Grant Scholarship Coordinator Tom Anderson Tander6854@sbcglobal.net. or District Grants Subcommittee Chair PDG Ellison Crider ellisoncrider@gmail.com with any questions you might have with respect to Global Grant Scholarships.

5. **Reporting Requirements:**

- a. Sponsoring Rotary Clubs are required to submit either a **Progress Report** or **Final Report** to The Rotary Foundation not later than 12 months from the time the grant funds were received. If a **Progress Report** is submitted, another report is required every 12 months thereafter until the **Final Report** is complete.

NOTE: *Please ensure that you save all receipts and/or invoices (and that these are clearly marked paid) as they **must be** filed with both the **Progress Report** and the **Final Report** to cover all the expenses*

- b. Failure to meet these report deadlines may seriously jeopardize your club's standing to request future grants, and may result in your club being disqualified to receive any further TRF funding.

NOTE: *Timely reporting and good stewardship of previous scholarships **will be** a consideration in determining a club's future scholarship award.*