COMMUNITY ECONOMIC DEVELOPMENT GUIDELINES GLOBAL GRANT FUNDING

These comprehensive guidelines are for Rotary members who want to apply for a global grant from The Rotary Foundation to support community economic development activities. You can use the links below to go directly to the section you're most interested in, but we encourage you to read the whole document for a full understanding of the guidelines before you apply for a grant.

WHAT ARE THE ROTARY FOUNDATION'S GOALS FOR COMMUNITY ECONOMIC DEVELOPMENT?

HOW DO I CONDUCT A COMMUNITY ASSESSMENT FOR COMMUNITY ECONOMIC DEVELOPMENT?

HOW DO I MAKE MY PROJECT IN COMMUNITY ECONOMIC DEVELOPMENT SUSTAINABLE?

WHAT TYPES OF PROJECTS AND ACTIVITIES ARE ELIGIBLE FOR GLOBAL GRANT FUNDING?

- **Vocational training**

- **Social enterprises or startups**

- **Microcredit**

- **Agriculture**

- **Renewable energy for economic growth**

- **Community-based adaptations**

- **Empowering marginalized communities**

- **Emergency preparedness**

- **Adopt-a-village**

WHAT TYPES OF PROJECTS AND ACTIVITIES AREN'T ELIGIBLE FOR GLOBAL GRANT FUNDING?

HOW DO I MONITOR AND EVALUATE A PROJECT IN COMMUNITY ECONOMIC DEVELOPMENT?

HOW DO I SUPPORT A SCHOLAR IN COMMUNITY ECONOMIC DEVELOPMENT?

WHERE CAN I FIND MORE INFORMATION?

WHAT ARE THE ROTARY FOUNDATION'S GOALS FOR COMMUNITY ECONOMIC DEVELOPMENT?

Rotary supports investments in people and communities toward alleviating poverty by creating measurable and enduring economic improvements in poor and underserved areas. We enable members to do this by:

- Building the capacity of local leaders, organizations, and networks to support economic development in poor communities

- Developing opportunities for productive work and improving access to sustainable livelihoods

- Empowering marginalized communities by providing access to economic opportunities and services

- Building the capacity of entrepreneurs, social businesses, and locally supported business innovators

- Addressing gender or class disparities that prevent populations from obtaining productive work and accessing markets and financial services

- Increasing access to renewable energy and energy-efficiency measures to create more sustainable and economically resilient communities

- Empowering communities to develop environmental and natural resource conservation skills for economic gain

- Strengthening communities' economic resilience and adaptive capacity in response to environmental and climate-related hazards and natural disasters

- Developing and supporting community-based basic emergency preparedness services to improve economic resilience

- Funding graduate scholarships for career-minded professionals related to community economic development

HOW DO I CONDUCT A COMMUNITY ASSESSMENT FOR COMMUNITY ECONOMIC DEVELOPMENT?

Community assessments identify where our support is needed most and the role Rotary members can have in making a difference. An assessment will illustrate a community's strengths and weaknesses and help you work with local residents on solutions. Project sponsors (often in conjunction with a cooperating organization) need to conduct a community assessment before applying for a grant. If an assessment has already been done, use the relevant data to design your project. **The Foundation will not consider projects without a community assessment.**

Use the community assessment to:

- Gather perspectives from a broad cross-section of the community, including women, young people, and professionals

- Allow community members to identify the needs that they perceive as the most critical

- Ask community participants how they can be involved in the proposed project

- Work with community members to identify long-term goals and expected project outcomes

- Gather baseline data before the project so you can measure your results

The community assessment results need to be incorporated into your project plan. The results should describe:

- How the project will meet the needs identified by the community

- The long-term goals or outcomes and how they'll be met (for example, through training and public awareness campaigns)

- How the community's resources will be used to implement project activities

- How the community will sustain the project after the grant project is complete

When you conduct a community economic development assessment, it's important to:

- Understand how the community's needs and assets are connected to the project's solutions.

- Create an opportunity for stakeholders to discuss what's appropriate and relevant for the project and how those factors come together.

- Discuss with key members of the community how to engage marginalized and underserved people to voice their opinions in front of local leaders, senior government officials, or prominent guests.

- Find ways to meet privately with trusted members of the community to elicit more honest and robust responses than you'd get from using outside consultants to conduct a public focus group.

- Ask community members what they think is the best way to meet their needs and how they can be involved — don't assume your solution is the only one.

HOW DO I MAKE MY PROJECT IN COMMUNITY ECONOMIC DEVELOPMENT SUSTAINABLE?

For Rotary, sustainability means providing long-term solutions to community needs that local residents can maintain after the grant funding ends. These solutions need to be relevant to the community and sensitive to cultural and environmental factors. Pay careful attention to the following items to ensure your project's long-term sustainability. **The Foundation won't consider projects without a clear plan for sustainability.**

Materials and technology

Involve community members when you select technology or equipment, and train them to operate, maintain, and repair it on their own. Involve all stakeholders — not just the local elite, but the actual users or people who'll benefit — in all aspects of the project implementation, including site selection, training, and maintenance. Purchase equipment and new technology from local sources when possible, and make

sure that replacement parts are readily available.

The grant application should:

- Describe the equipment being purchased or donated and the plans for training people to operate and maintain it.

- Explain why for any equipment that's not being purchased locally, and provide plans for training, operation, and maintenance in the community, including how replacement parts will be obtained.

- Describe the physical environment where the equipment or technology will be kept, identify who owns it, and provide security protocols.

- Explain how this equipment or technology is essential or related to the project's objectives.

- Include an official document that identifies the community as the owner of the materials and technology.

Financial planning

Ensure that your project will have sustainable funding from local organizations, the community, or the government to integrate the project into the community and supports its long-term success. Confirm that local funding sources are available to pay for long-term operational costs, maintenance, training, replacement equipment, or updated technology. Compensate project participants appropriately for their work to ensure continued service.

The grant application should:

- Describe the fundraising activities that government agencies, nongovernmental organizations, or private entities have planned to generate future funding. (The Rotary Foundation and clubs cannot provide indefinite support.)

- Document the available support for the project, if applicable, from the relevant government ministry or authority, including funding for current or recurring costs, advocacy, policy implementation, training, education, allocation of personnel, or materials.

- List foundation or private-sector partners that support, or may support, the project and will continue to do so after the global grant is complete.

- Describe any fee-for-service, insurance, or revolving funds that may provide sustained revenue for the project.

- Describe a two- to four-year plan for how the community will replenish funds after the global grant is complete.

Training and education

Training should make the most of local resources, people, skills, and expertise to ensure sustainable

change to local economies. It shouldn't be a standalone course or one-time intervention. It's an opportunity to:

- Provide training, education, and community outreach to the people who will benefit from the project, as well as to service providers and technicians.

- Work with local governments, private and public agencies, and other organizations to supply expertise, as needed.

The grant application should:

- List the training curriculum and schedule.

- Describe the training for service providers and technical project workers. Give an overview of the curriculum, schedule, and performance indicators. Include the trainers' activities. Indicate whether training is in the project budget or funded externally.

- Describe who will benefit from the training and identify the trainers. List the materials and other resources you need or have secured, as well as the training goals. Indicate whether the materials and other resources are in the project budget or funded externally.

- Describe public education campaigns to teach local residents about project-specific prevention and intervention strategies. Give a timeline, a target population, an overview of the training materials, and collaboration details. Indicate whether these awareness campaigns are in the project budget or funded externally.

- Explain how the training need has been assessed.

- Include a community plan for continuing education activities after the project is complete.

- Describe on-the-job training, mentoring, or coaching activities.

- Describe how the training will provide new skills in response to specific needs, including incentives to apply the new skills.

- Describe how the training will empower and enable people to train others in using new technology, methods, or skills.

- Describe how the training will empower the community's members and leaders who are capable of serving as trainers or influencers, in either formal or informal roles.

- Identify who will provide the training, their qualifications, and the duration of the training program.

- Explain whether this is a new training that will start as a result of the grant.

- Describe how you're ensuring that all relevant stakeholders, particularly women, are identified and receive training.

WHAT TYPES OF PROJECTS AND ACTIVITIES ARE ELIGIBLE FOR GLOBAL GRANT FUNDING?

The Foundation considers the following activities to be within the scope of community economic development:

- Providing poor communities with access to financial services, including microcredit, mobile banking, savings, and insurance

- Offering training related to community economic development, including entrepreneurship, community leadership, vocational skills, and financial literacy

- Developing community members' economic and employment potential through leadership training and empowerment, especially initiatives for women, refugees, and young adults

- Supporting the development of small businesses, cooperatives, or social enterprises as well as income-generating activities for poor communities, such as area-wide businesses that provide employment

- Furthering agricultural development for subsistence and small farmers, including building their capacity and facilitating access to financial markets and capital

- Organizing comprehensive and holistic development activities specific to one community

- Supporting equal and effective economic opportunities for women, refugees, and other marginalized people

- Providing access to renewable, clean, and efficient energy through sustainable, locally purchased, and innovative technology, and providing access to training that's directly connected to economic outcomes

- Improving the ability of communities to adapt to environmental and climatic changes by building capacity and developing sustainable economic activities

- Providing training and resources to support basic emergency preparedness initiatives, such as fire prevention and natural disaster readiness, that strengthen communities' economic resilience

Global grants commonly fund the following types of community economic development projects, and for each type the outcomes need to be quantifiable. Please pay close attention to the eligibility requirements and the information that needs to be submitted with your application.

The Foundation assesses each project individually. If your project type isn't among those described below but is clearly linked to the outcomes listed above, contact your regional grants officer, a member of the Cadre of Technical Advisers who specializes in community economic development, the Rotary Action Group for Community Economic Development, or your district international service chair early during your planning for help designing the project and applying for a grant.

Vocational training

Vocational training refers to instructional programs or courses that focus on the skills required for a

particular job function or trade. It prepares people for specific careers through participatory, job-specific instruction. Vocational training is key to making people employable and allowing them to obtain decent work. For a vocational training project, address job market issues that local people face. Involve local resources, people, skills, and expertise in order to bring sustainable change to the local economy.

For your project to be eligible, you need to provide:

- The community assessment: List the skill challenges and opportunities in the community and describe the local economic activities and the assets available. Sometimes, regional and national data will provide more insight. Your assessment will also include entrepreneurial opportunities, job market options, and any skill gaps. It should specify what vocational training the project is planning to offer and why you chose it. Say whether you have talked to industry professionals about what skills are available and lacking for their industries. Explain why this training would be an opportunity for local workers.

- An explanation of how the project will help people get jobs, generate income, or improve their livelihoods. For any education at the secondary school level, make sure that the age of those involved in the program complies with national law. Consider offering internships and job placement assistance.

- For an existing program, a description of the training and how your project will improve either the quality or quantity of it to better address the lack of skills and opportunities. Simply improving the physical facility or replacing existing equipment doesn't meet the requirements for a global grant.

- A sustainability plan: Project sponsors should develop this plan with stakeholders to show how the project will continue after the grant funding ends. When possible, include a written acknowledgement from the institution that will maintain the project. Projects cannot rely on Rotary, either through Foundation grants or club funding, for their continuing operational costs. Rotary strongly recommends providing regular observation and follow-up training for all stakeholders. Any purchase of large equipment requires a three- to five-year financial plan with clear sources of funding for maintenance and operations.

- A monitoring and evaluation plan: This is the specific plan to track, measure, and learn from the project. The desired outcomes need to be realistic for the project's time frame, and key performance indicators should inform how the project is implemented and evaluated. You can measure the number of people trained, jobs created, internships obtained, or entrepreneurs coached and mentored; the improvement in incomes or wages after the training; the support for participants afterward through job placement or microbusiness opportunities; and a description of what it means to graduate from such a program.

- A plan for entrepreneurship training, networking, and peer-to-peer knowledge sharing, if possible.

Social enterprises or startups

Nobel Peace Prize laureate Muhammad Yunus defines a social enterprise as one that solves a community problem and has its dividends put back into the business. A revenue-generating business with primarily social objectives, where surpluses are reinvested for those objectives (rather than to deliver profits to shareholders and owners), can also be considered a social enterprise. Note that projects involving a financially self-sustaining activity run by a nonprofit organization to use for ongoing programming are not eligible for global grants.

For your social enterprise project to be eligible, you need to provide:

- A community assessment: Describe the product or services offered by the social enterprise and specify who the customers would be, what your market potential is, and what you could do that would make people buy your products instead of another. Explain any restrictions that would impede production and how you plan to overcome them. List any distribution restrictions. Explain how the financial structure of the business (startup expenses, cash flow projections, and financial sustainability) will be stable.

- An explanation of the target community: Describe who will mainly benefit from this project, what percentage of the community that represents, and how the larger community will benefit from it. Explain whether gender is a factor in this.

- A description of the ownership structure: Explain who owns the social business and whether that is a legal entity. Say whether any of the owners are from a poor or disadvantaged community and whether they'll directly gain financially from their involvement.

- An explanation of the business product or service that you believe will solve a social problem, a description of its direct social impact, and a business plan. This business plan needs to address legalities, financial matters, and sustainability. A typical plan could include a description of the business and its products and services, a summary of the business strategy and implementation plan, a timeline, a description of the management structure, confirmation of legal registration, and the financial structure of the business.

- A sustainability plan: Project sponsors should develop this plan with stakeholders to show how the project will continue after the grant funding ends. When possible, include a written acknowledgement from the institution that will maintain the project. Sales and revenues are expected to break even with fixed and variable expenses.

- A monitoring and evaluation plan: This is the specific plan to track, measure, and learn from the project. The desired outcomes need to be realistic for the project's time frame, and key performance indicators should inform how the project is implemented and evaluated. For social enterprises, you can measure the progress toward financial targets and sustainability as well as toward the social targets to make the community impact you envisioned. Other factors to measure include the number of jobs created and the services provided to marginalized community members.

A startup is a business at the early stage of its lifecycle, when the entrepreneur moves from having an idea to securing financing, developing the basic structure of the business, and initiating operations. Startups need business skills development, networking, funding, and peer-to-peer reviews. It's crucial that all startups set clear and realistic goals and pay special attention to a thorough business plan.

For your startup project to be eligible, you need to provide:

- The community assessment: This should include the same factors as an assessment for a social enterprise, but with a more detailed analysis to understand the business market — especially the competitors for this startup.

- An explanation of the project's components: This includes designing, developing, and monitoring a business plan with clear communication of the projected strategies, vision, and financial forecasting that will be done to reach the goals. Include a five-year financial projection using cash analysis (revenue, expenses, profits or losses, and amortization of loans) for larger equipment if this is part of the project. The training needs to be followed by a mentorship, networking, or peer-to-peer support plan.

- A sustainability plan: Project sponsors should develop this plan with stakeholders to show how the project will continue after the grant funding ends. Rotary strongly recommends providing regular observation and follow-up training for all stakeholders. Any purchase of large equipment requires a three- to five-year financial plan with clear sources of funding for maintenance and operations. The plan should also address the entrepreneurs' abilities to sustain or scale up their businesses.

- A monitoring and evaluation plan: This is the specific plan to track, measure, and learn from the project. The desired outcomes need to be realistic for the project's time frame, and key performance indicators should inform how the project is implemented and evaluated. For a startup project, you can measure the number of jobs created and the number of entrepreneurs trained, mentored, and coached. A larger analysis can examine the number or percentage of the target population that are employed or self-employed in sustainable livelihood activities and specify how much people's incomes improved or their wages increased after the project.

Microcredit

Small and medium-sized enterprises play a major role in most economies, particularly in developing countries. They account for the majority of businesses worldwide and are important contributors to job creation and global economic development. Rural and underserved communities rely on small and medium-sized enterprises and family businesses to create or maintain jobs and improve people's livelihoods. However, access to finance is a key constraint to growth for these enterprises. We support using microloans as a tool to help small and medium-sized enterprises, family-based businesses, and local entrepreneurs.

For your project to be eligible, you need to provide:

- The community assessment: Describe the local economic activity, especially the activities that will be supported by the loan program. Highlight the household income sources, livestock ownership, saving capacity, social support networks, any existing microfinance system, the economic challenges and opportunities, interest rates, and local microfinance stakeholders. Describe who will benefit from the microloans, why the loan is important for them, their business models, the activity period of the target beneficiaries, and their past loan performance.

- A description of how the project will implement training, develop capacity, and establish mentorship, networking, and knowledge-sharing between the people who benefit, both within the specific business network and the larger world. Depending on the results of the community assessment, include training in the technical aspects of microcredit but also in skills like leadership, communication, and financial literacy.

- A microcredit application supplement that includes the memorandum of understanding between Rotary members and the microfinance institution involved. Include documentation such as an audited financial statement and annual report from the microfinance institution.

- A sustainability plan: Project sponsors should develop this plan with stakeholders to show how the project will continue after the grant funding ends. Discuss with the microfinance institution involved how to increase the loan pool using a lower and competitive interest rate. As part of the sustainability plan, the microfinance institution and Rotary members should create a gradual exit plan for each person receiving a loan.

- A monitoring and evaluation plan: This is the specific plan to track, measure, and learn from the project. The desired outcomes need to be realistic for the project's time frame, and key performance indicators should inform how the project is implemented and evaluated. For microloans, you can measure how many people received loans, have functional businesses, paid back their loans, mastered business skills, or received training and networking support. You can track how many people expanded their business because of the project, hired more people, or increased their business revenue (and by how much). You should also measure how many people have exited the loan system.

Note that all microloan projects require an area of focus secondary review, regardless of the size of the grant you applied for. No agreement about returning funds to the grant sponsors should be accepted without a discussion involving the Foundation. If a loan isn't being used for the purpose it was designed for, sponsors are required to return it.

Agriculture

(May be eligible under both community economic development and environment, and irrigation projects may be eligible under water, sanitation, and hygiene)

In most developing and emerging economies, farmers in both rural and urban areas are among the most

food-insecure members of society. Farm yields are constrained by the availability and affordability of quality seeds and fertilizers. Climate change has made weather patterns unpredictable, which affects planting and harvesting seasons, as well as the availability of fodder for animal herds. We support projects that help small-scale farmers increase their incomes and profitability and diversify their livelihoods. Community economic development agriculture projects are expected to strengthen small-scale institutions, improve agricultural production and marketing, and build the capacity for employment and enterprise development.

For your project to be eligible, you need to provide:

- The community assessment: Describe the local economic activities, explain agriculture inputs and outputs (including an analysis of the agriculture sector to highlight where farmers need more help) and highlight the current farming practices and production. Explain the gaps in skills, knowledge, and resources, and explain why the project improves the existing system. Analyze the local market and involve farmers in designing the project. For irrigation projects, explain how the proposed design of irrigation structures would incorporate farmers' traditional knowledge and experience.

- A description of how the project will increase farmers' capacity (through technical training), improve agricultural investment (in seeds, equipment, and local infrastructure), increase water collection for irrigation, establish or expand cooperative activities, and use more effective seed varieties or fertilizers (that won't hurt the soil, humans, or animals). Agricultural projects can also include the adoption of new technology and cultivation methods and techniques to lower the cost of seeds and fertilizers, improve the selling prices of agricultural products through better market or storage systems and output processing, and the establishment of production systems that reduce risk. Animal husbandry is also considered an important component to support small-scale famers. For irrigation projects, explain the clear connection between the implementation of an irrigation system and an increase in farmers' incomes or production.

- Documentation of land use to make sure that all land issues are accounted for. All land use documents should define ownership and be signed. Specify whether an irrigation system will be used individually or in groups. Identify who will own the materials and the structure that will be established to sustain it.

- A hydrogeological survey if underground water will be used. Find ways to encourage periodic training in irrigation technology, water management, operation and maintenance, and service delivery. A financial management plan is important, especially for maintenance and operation costs.

- A sustainability plan: Project sponsors should develop this plan with stakeholders to show how the project will continue after the grant funding ends. This is especially important when the project includes equipment related to its activities. For example, post-harvest and irrigation equipment will require a financial analysis that takes maintenance and operation costs into account.

- A monitoring and evaluation plan: This is the specific plan to track, measure, and learn from the project. The desired outcomes need to be realistic for the project's time frame, and key

performance indicators should inform how the project is implemented and evaluated. For agriculture projects, you can measure farmers' income or harvest data before and after the project, as well as how many farmers used the training, increased their yield and amount of land harvested, and gained access to better storage systems. You can also track the average revenue growth since the project and the number of people who have reduced their production losses (and by how much) because of their new practices (and specify which ones).

- A summary of the discussion you had about water, animal health, and food with the people who'll benefit before proceeding with any animal production project (such as animal husbandry, dairy farming, or poultry).

- A plan, if the community assessment suggests it, to train the people who'll benefit from the project about basic animal food, health, water, and reproduction issues.

Renewable energy for economic growth

(May be eligible under both community economic development and environment)

Improving people's access to safe, sustainable, reliable, and affordable energy can significantly improve their livelihoods in poor and underserved communities. Opportunities for people to be involved in activities linked to providing energy services and technologies can increase their incomes and build resilience. We support renewable energy projects designed to improve people's livelihoods in poor and underserved communities. Solar panels and other renewable energy equipment that's used to save money aren't eligible for community economic development global grants.

For your project to be eligible, you need to provide:

- The community assessment: List the needs and the assets in the community related to renewable energy. Describe the demographics of the community, how long it has been without electrical power, and the location of the closest grid. Explain the market of energy, meaning the number of people willing to pay multiplied by the amount they are willing to pay. Describe the economic and social benefits to the community, specify who will own the equipment, how the energy will be distributed, and whether anyone in the community has experience managing similar technology.

- A description of the benefits that the project will bring to the community. These may include creating jobs and generating or increasing people's incomes.

- A sustainability plan: Project sponsors should develop this plan with stakeholders to show how the project will continue after the grant funding ends. This includes analyzing economic and technical factors such as investment costs, operation and maintenance costs, how long any assets will be useful for, the payback period (the cost of the project divided by the annual cash inflow) and the potential use of energy for economic activities. Larger equipment would need a financial plan specifying the source of funding for operation, maintenance, and upgrade costs. You should also assess the energy production capacity, how long the technology will last, its reliability, the safety of the technology for the people using it, how to keep the technology from being stolen, and

any environmental consequences.

- A monitoring and evaluation plan: This is the specific plan to track, measure, and learn from the project. The desired outcomes need to be realistic for the project's time frame, and key performance indicators should inform how the project is implemented and evaluated. For energy projects, you can measure how many people created small enterprises due to the renewable energy, how many people expanded their work time, how many jobs have been created, how many people have increased their incomes, and what percentage of the community has greater access to electrical power.

Community-based adaptations

(May be eligible under both community economic development and environment)

Community-based adaptation projects focus on reducing people's exposure or sensitivity to the impact of climate change, which usually involves building adaptive capacity — particularly of the most vulnerable people. It uses a community's priorities, needs, knowledge, and capacities to empower it to plan for and cope with climate change by preserving, protecting, and sustainably using resources.

For your project to be eligible, you need to provide:

- The community assessment: Gather information about the climate-related issues facing the community and how they might affect people's livelihoods. Include any physical context, environmental features, climate hazards, and economic assets that are being lost because of climate events. Identify which people and activities are relevant to the change. Explain the community's situation and how it has changed, who's being affected by the change and what portion of the population they represent, what economic losses are possible due to the change, and what solutions have already been designed and implemented.

- A description of the factors that affect the capacity of people, households, and communities to adapt, including their access to and control over natural, human, social, physical, and financial resources. Consider factors such as the knowledge of climate risks, conservation agriculture skills, women's savings and loans groups, farmer-based organizations, other social support institutions, any irrigation infrastructure, seed and grain storage facilities, reliable water sources, the amount of productive land, vegetation and tree cover, the availability of microinsurance, and the diversity of income sources.

- A sustainability plan: Project sponsors should develop this plan with stakeholders to show how the project will continue after the grant funding ends. This includes analyzing a community's current exposure to climate shocks and stresses as well as a context-based analysis of future climate effects. Because people sharing their knowledge is expected to be the main factor in sustainability, the involvement of the community is critical.

- A monitoring and evaluation plan: This is the specific plan to track, measure, and learn from the project. The desired outcomes need to be realistic for the project's time frame, and key

performance indicators should inform how the project is implemented and evaluated. For community-based adaptations, you can measure how many people changed their agricultural practices, used new agricultural skills or diversified their crop system, changed their jobs, increased their incomes because of new adaptations, and what percentage of the community changed production systems.

Empowering marginalized communities

We believe that empowering marginalized communities through access to economic opportunities is a collective action to reduce societal inequities and secure more equitable access to labor, land, and financial markets for the most vulnerable people.

For your project to be eligible, you need to provide:

- The community assessment: Gather information from all community stakeholders, with a special emphasis on marginalized people. Make sure marginalized voices are heard and get local leaders to specify how they'll support the participation of marginalized people. List the different groups of people who historically have been excluded from economic activities (such as migrants, Indigenous peoples, or people with disabilities) and say how and why they have been marginalized. Explain what causes the exclusion (the social, economic, political, or environmental factors), what else you know about these groups, and how the project takes into account their aspirations, fears, and apprehensions.

- A description of how the project will empower marginalized communities, such as by building capacity or providing training that will help people earn money. Income-generating activity should be part of the project, and the community assessment results need to indicate how any humanitarian goods being distributed will stimulate household economic activity. The distribution of goods such as wheelchairs or sewing machines should be a small part of a project's budget, so explain how the specific item or brand solves the problem and describe how community members participated in choosing the items.

- An explanation of how you'll involve and engage representatives of marginalized populations in implementing and managing the project, including how you'll use culturally appropriate communication. Consider adding a support system for participants, such as a mentorship, networking, or leadership development program.

- A written commitment in the memorandum of understanding from the entity that will provide training or capacity building, if those aren't funded by the grant.

- A sustainability plan: Project sponsors should develop this plan with stakeholders to show how the project will continue after the grant funding ends. This is especially important if the project includes equipment related to its activities. For example, the plan should say how equipment maintenance and operational costs will be funded after the grant ends.

- A monitoring and evaluation plan: This is the specific plan to track, measure, and learn from the project. For these projects, you can measure how many people raised their incomes, used new

skills to earn more money, or changed their jobs. You can also track the number or percentage of the target households that have enough food or income to meet their survival threshold, that have strengthened their existing economic activities, or that are no longer in a marginalized situation.

Note that projects that are initiated and driven by suppliers who want to use Rotary grants to sell and distribute their products are **not eligible** for global grant funding.

Emergency preparedness

Disasters triggered by natural hazards can wreak devastating consequences on people, infrastructure, assets, and economies. We support projects that help local governments prepare for and mitigate the impact of events such as floods, droughts, cyclones, earthquakes, and tsunamis. This preparedness encompasses all of the activities that need to be in place for a community to effectively coordinate a response during a natural disaster or other emergency.

For your project to be eligible, you need to provide:

- The community assessment: Describe what types of emergencies have occurred in the area in the past three to five years, how the local or central government responded, which segments of the population have been disproportionately affected and why, and what the past and projected economic losses to the community are because of natural disasters. List the key people involved in preparedness, such as government officials, local authorities, community leaders, volunteer or paid disaster response specialists, or public works officials. Explain the current preparedness plan, including training, recruitment, sustainability, communication, public awareness, education, and outreach. Say how the plan has changed in the past three to five years.

- A description of how the project fits into the community's current preparedness plan, including an endorsement from appropriate local or national authorities. Explain how it will be integrated into existing municipal systems. Describe a training plan for emergency responders and community members, a plan for recurring training, and the names and backgrounds of the trainers.

- A public education and outreach campaign for the community or groups that will be affected by the proposed plan. It should explain how the project will lessen environmental and infrastructure risks that make the community vulnerable to natural disasters.

- A sustainability plan: Project sponsors should develop this plan with stakeholders to show how the project will continue after the grant funding ends. This should include a clear statement about which government entity or nonprofit organization will own and operate any equipment that's purchased, a certification that any equipment or vehicles purchased with grant funds are in working condition, and a written financial sustainability agreement with the relevant local authority. That should address the plan to pay for the operation, maintenance, and replacement or upgrade of larger equipment and for continuous training, scheduled drills, etc.

- A monitoring and evaluation plan: This is the specific plan to track, measure, and learn from the

project. For this type of project, you can measure how many training events were organized, the number of people trained, the percentage of the community participating in the drills, the number of drills organized, and the percentage of the population that will benefit from the emergency preparedness. You can also track the perception of the project by staff and volunteers and the government's assessment of the community's level of preparedness.

Adopt-a-village

With meaningful information, guidelines, and technical and financial support, poor communities can organize to identify community priorities and address local problems. By working in partnership with local governments and other institutions, they can design a collaborative project aimed at eradicating endemic poverty at a community level. These projects should be designed as a unique solution for a single community — a holistic approach to a complex problem such as extreme poverty or conflict — not a combination of disparate, unsustainable, unconnected, and small activities in one grant request.

For your project to be eligible, you need to provide:

- The community assessment: Describe why this type of project is the best solution to the issues facing members of the target community. Say how they've participated in designing the project, such as by identifying the assets and needs they perceive as critical. Explain how you used a community assembly or other means to gather perspectives from a broad cross-section of the community. Describe how you identified the project's long-term goals and asked people how they can be involved. The community's active involvement is key, so local leaders should determine how the project should be implemented.

- A description of how the project will use a coordinated approach to help community members develop leadership skills and carry out the multifaceted strategy. Because projects of this type include components from various areas of focus, explain clearly how those elements work together to help the target community. Training or building capacity needs to be available throughout the project. Focus on leadership skills for the whole community, not just the current leaders, and use training, mentorship, or the establishment of governance structure or a Rotary Community Corps to help the community feel ownership of the project. Describe your discussions of the plan with local and central governments and how you established a clear communication plan for all stakeholders, including community members.

- A sustainability plan: Project sponsors should develop this plan with stakeholders to show how the project will continue after the grant funding ends. For these types of projects, community leadership and a feeling of ownership are key, which is why the training and capacity building should be broadly based. Include a clear financial plan that specifies who will pay for any maintenance and operational costs, based on a discussion with the community and its leaders.

- A monitoring and evaluation plan: This is the specific plan to track, measure, and learn from the project. For this type of project, you can measure the number or percentage of the target population that improved their productive assets, how much they improved their production by, the number or percentage that are employed or self-employed in sustainable livelihood activities

(specify if necessary), and the percentage of people whose health, education, or environment has improved.

WHAT TYPES OF PROJECTS AND ACTIVITIES AREN'T ELIGIBLE FOR GLOBAL GRANT FUNDING?

The Foundation considers these activities to be outside the scope of the community economic development area of focus, and therefore **not eligible** for global grant funding:

- Projects that only seek to donate equipment

- Projects involving a financially self-sustaining activity run by a nonprofit organization to use for ongoing programming

- Solar panels or other renewable energy equipment that is used to save money

- Community infrastructure or equipment projects without direct economic results, or without operational and maintenance plans

- Community beautification projects such as parks and playgrounds

- Projects initiated and driven by suppliers who want to use Rotary grants to sell and distribute their products

- Disparate, unsustainable, unconnected, and small activities combined into one grant request

- Projects to rehabilitate community centers

HOW DO I MONITOR AND EVALUATE A PROJECT IN COMMUNITY ECONOMIC DEVELOPMENT?

Your community assessment, which contains baseline data about the local needs and capacity, will be the foundation of how you measure and evaluate your project. Develop clear and measurable objectives and decide how you'll collect the data. Include in your measurements only the people who'll receive an immediate benefit from the project activities. Select at least one standard measure and explain whether you have baseline data and how you'll use it to compare the results. Describe the data collection plan and who will collect and compile the information.

Gather data based on your objectives and your specific project type to inform how the project is implemented and evaluated. Include these indicators:

- How many jobs were created

- The expected increase in people's income

- The number or percentage of the target population that have improved their livelihood activities

- How many skilled service providers or technicians were trained

- The number or percentage of target households that have enough food or income to meet their survival threshold

- The number or percentage of the target population that can replace or increase their productive

assets

- How much you collaborated with other cooperating organizations, ministries, or universities (e.g., by tracking how many hours of work you've done together)

- The number or percentage of the target population that have reduced their production losses and by how much because of new practices (and specify which ones)

- The incomes of project participants before and after the grant

- A cost-benefit analysis that examines training in the local economic context

- Measurements showing how the trainings will increase opportunities or incomes

How you gather this data can vary. It can be collected by Rotary members, cooperating organizations, or other stakeholders.

Evaluating a project is important so you can understand if the implementation is going well, if you need to make any changes, if the project is ready to expand or be replicated, and more. Work with your cooperating organization and other stakeholders to develop an evaluation.

HOW DO I SUPPORT A SCHOLAR IN COMMUNITY ECONOMIC DEVELOPMENT?

Global grants support graduate-level scholarships for professionals who want to pursue careers in community economic development. Applicants should demonstrate how their work has contributed to the economic well-being of poor, low-income, or underserved communities at the local, regional, or national level.

The Foundation considers these factors for global grant scholarship applications:

- The person's previous experience in community economic development, including education, volunteering, and work background.

- The academic program's alignment with the person's background and future plans. Programs that may be eligible include social science degrees focused on community economic development and business degrees tailored to social business, micro-entrepreneurship, or microcredit.

  - The academic program should:

    - Emphasize local, regional, or national economic development strategies

    - Focus on addressing the economic issues of poor, low-income, and underserved communities

    - Support social business development, such as a specialized track within a Master of Business Administration program

    - Provide a degree that teaches entrepreneurial skills or supports startups at the local,

regional, or national level

- ▪ Include "community development" in the name of the program or specialized track

- ▪ Improve the coaching or advising capability of someone who works with small businesses or entrepreneurs

- ▪ Use urban planning principles to guide economic development strategies

- ○ Programs that will not be favorably considered include those that:

  - ▪ Focus on purely theoretical, macro-level economics, politics, or finance

  - ▪ Support general private business development, such as an MBA for professions unrelated to social enterprises

- • The applicant's career plans related to community economic development.

  - ○ Careers that will be considered favorably include those that:

    - ▪ Improve the economic and social well-being of poor, low-income, and underserved communities at the local, regional, and national level

    - ▪ Are in a nonprofit or social enterprise environment

    - ▪ Support advocacy for the economic and social well-being for poor communities, youths, women, Indigenous peoples, refugees, and other underserved populations

  - ○ Careers that will not be considered favorably include:

    - ▪ General roles in business, engineering, or social work

    - ▪ General administration in a private or corporate environment or for-profit business

    - ▪ Macro- or high-level policy administration

    - ▪ Macro-level economics-based academic work

- • Other factors: If an applicant plans to study an economic development topic that falls under international development or international relations, the person's connection to serving poor and underserved communities is significant. Their background and career plans should be evaluated to make sure they are targeting economic interventions in poor communities.

WHERE CAN I FIND MORE INFORMATION?

One of the best resources available to grant applicants is the Rotary grants staff. In addition to their professional expertise and education, grants staff members draw on The Rotary Foundation's long experience in funding effective projects to make sure your global grant projects are eligible for funding.

Rotary has an array of other project planning resources to help members find answers at various steps of the process. These resources can help you plan a successful project, find support for your efforts, promote your work, and evaluate its impact.

You can also find information to help you plan for your community economic development global grant in:

- [A Guide to Global Grants](#)

- [Terms and Conditions for Rotary Foundation Global Grants](#)

- [Areas of Focus Policy Statements](#)

- [Six Steps to Sustainability](#)

- [Global Grant Monitoring and Evaluation Plan Supplement](#)

- [Global Grant Lifecycle](#)

- [Economic and Community Development Project Strategies](#)

- [Global Grant Application Supplement for Microcredit Projects](#)

- [Global Grant Report Supplement for Microcredit Projects](#)