



## GLOBAL GRANT CHECKLIST

*Global grants support large international activities with sustainable, measurable outcomes in Rotary's areas of focus. By working together to respond to real community needs, clubs and districts strengthen their global partnerships. – The Rotary Foundation website*

So you want to start a global grant project – abroad, or in the US – where do you start? This global grant checklist is District 5230's advice on how to take your project from idea to reality.

Rotary Foundation Global Grants are allocated on rolling basis throughout the year. It is useful to develop and submit your grant during the same Rotary year, since approval is required of the partner club, District Governors, District Foundation Chairs, which turn over at the end of the Rotary Year.

Global grants are for projects with a total budget of at least \$30,000. The Rotary Foundation will contribute a minimum of \$15,000 to each global grant. District 5230 will match up to 100% of club contributions to a global grant, if approved by the District Grants Subcommittee. The Rotary Foundation will match 50% of club or individual contributions, and will match 100% of District contributions. If all goes well, you will get 2.5 times the local club's investment in the project!

For all Global Grants – before you file the application:

- **MOU and Financial Plan:** File the Club Qualifications MOU and Financial Plan, signed by the Club President and President-Elect, with the District Grant Coordinator.
- **Prior Grant Reports:** File the required progress and final reports for any prior Global Grants with Rotary International to assure that you are a club in good standing.
- **Training:** Review the Rotary Guide to Global Grants.
- **Area of Focus:** Determine your project's area, or areas, of focus:
  - Peace and conflict resolution
  - Disease prevention and treatment
  - Water and sanitation
  - Maternal and child health
  - Basic education and literacy
  - Economic and community development
- **Sustainability Plan:** Set up a plan to assure that your project is sustainable over time.
  - Visit the project site and conduct a community needs assessment.
  - Use local materials and equipment.
  - Identify the local funding source for operating and maintenance costs.
  - Provide education, training and community outreach.
  - Motivate beneficiaries to take ownership – is the project a priority for their community?
  - Monitor and evaluate the results – with “before” and “after” data on project-specific goals

- **Monitoring Plan:** Prepare a monitoring plan with project-specific goals track the success of your grant in meeting stated objectives, such as water quality or supply, persons served, etc. The *Global Grant Monitoring and Evaluation Plan Supplement* provides ideas on the project-specific goals within each area of focus.
- **Global Grants Calculator:** Use the Rotary global grants calculator to determine what package of revenues will help you raise enough money to match your budget needs.
- **District Approval:** Submit your draft grant proposal to the District Grants Coordinator for advice and approval prior to starting the online grant application.
- **Cooperating Agencies:** Secure signatures on a Memorandum of Understanding with the cooperating agency, if any, the Host Rotary Club and the International Club. Designate a point person with the cooperating agency who will work on the project over several years.
- **Bank Account:** Open a separate bank account for the individual Global Grant, with the name of the project. Assure that two signatories sign each check.
- **Club Contacts:** The Grant application requires that you designate a primary and secondary contact for the grant with both the Host Rotary Club and the International Rotary Club, who will work on the project over several years, if needed.
- **Partner Club Funding:** Obtain actual contributions from individuals and partner clubs before applying for the district grant; have clubs deposit funding directly into the project bank account, to avoid the 5% RI surcharge; or allow clubs to contribute through RI in order to obtain Paul Harris Fellowship points.
- **Online Grant Application:** Prepare the online global grant application, which you will find at [grants.rotary.org](http://grants.rotary.org). You will need to set up your Rotary.org account to access this site.
- **Authorizations:** Before your grant will be submitted for evaluation, you must have authorization by: the host and international club primary contacts and the District Foundation Chair(s), the District Governors. It is useful to get their preliminary approval ahead of time.

For projects in another country:

- **International Rotary Club:** Develop a relationship with the International Rotary Club and *make sure it is a club in good standing* – check with the RI Zone 26 coordinator: Cecelia Walter, to confirm the International club’s status: [cecelia.walter@rotary.org](mailto:cecelia.walter@rotary.org).
- **Visit the Project Site** ahead of time, to help establish relationships and develop the required grant application information.

For Projects in the U.S.:

- **International Funding:** You must secure 30% of your grant funding from International Clubs or Districts.

All the above-referenced documents are available on DACdb.com under the FILES tab, Public Files, **Grant Documents – 2019-20**. Or feel free to contact your District Grants Coordinator, Debbie Hale, at [debnandy@sbcglobal.net](mailto:debnandy@sbcglobal.net), (831) 596-4542.