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District 6860 Global Grants Training

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What does it take to make
a Global Grant become reality?

Defining and Designing your Project

We often start here:

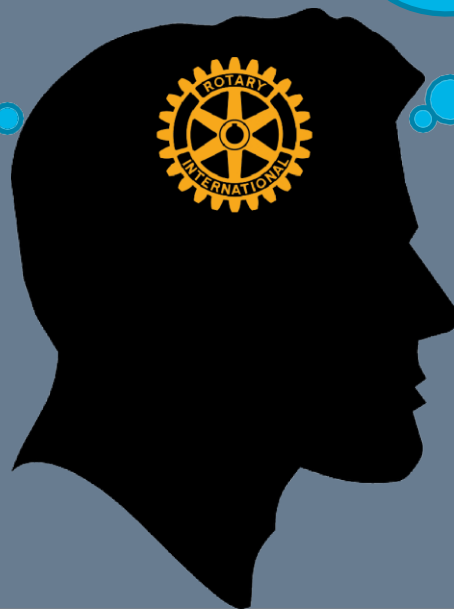
**My club wants a Global
Grant but we don't
know where to start!**



Then we look at the Application!

FocusArea
Sustainability
Stewardship
Needs assessment
Partners
Beneficiaries
Funding

Too many tabs!
So many questions!
Too Complicated!



Projects to join

- Join another club that is developing a Global Grant project
- Find a club overseas with a project that needs an International Partner with money
- Help fund Global Grants that have been developed by others. For example: Heart 2 Heart

References:

<http://heart2heartprojects.org/>

www.matchinggrants.org

<http://ideas.rotary.org/Project/Find>



Example of a Project to join: Heart 2 Heart

- D4170 (Mexico City) and Zones 30-31
- 14-year growing relationship
- 8-10 Global Grants per year
- \$1MM per year total project cost
- Annual pilgrimage in November



Some of us are now here



**That's all nice but we
want to have our own
project!**

Suggestions to begin the process

- Principle 1: Find a team of people in your club who are passionate about doing International service.
- Principle 2: Find a project that all of you can get excited about.
- Principle 3: Don't start the application until you know what you want to do!
- Principle 4: Be thinking about fundraising projects and other ways to fund the grant.

Team Expectations :

- Be persistent
- Make multiple contacts with your Host Sponsor
- Find a way to do a Needs Assessment in country
- Contact the RI staff member in charge of grants in that country
- Spend hours writing the grant application
- Be disappointed when the grant comes back to you for revision
- Be diligent with respect to the grant funds
- Be overwhelmed with awe when you see the results

Important!!

- Don't let the funding define your project
- Find a good project and then get the funding
- We need big projects to be successful
- Bigger projects are easier to fund

Develop your own project

- Where
- Who
- What
- Area of Focus
- Goals
- Short summary

Where is your project?

- Do you have a traveler?
 - Someone who frequently visits another country
 - Has time to visit potential project areas
 - Can visit Rotary clubs
- Can you travel with others?
 - Churches
 - Non-Profit organizations
 - Other Rotary clubs
 - Use a Group Study Exchange
 - All of this travel can be paid by your District Grant

Find a Host Sponsor

Determine what club (from the country you want to do the grant in) will be best to partner with:

- Active and experienced in Grants
- Willing to work with your club
- Accepting a balanced relationship
- Are District and Club qualified
- Build a personal relationship from the beginning

Find potential project areas

- Check RI for other projects in country
- Ask local officials if they have a needs assessment
- Do the clubs have ideas?
- Is there a specific population in need?
- Are there local community health committees?

Determine beneficiaries

- Beneficiaries are people, not organizations
- Can you count them?
- What do they need the most?

Perform a Community Assessment

- Work with the local club
- Involve community health groups and governments
- Consider both assets and needs of the community
- Select a project
 - Near the top of the needs list
 - Time and scope of work interesting to the clubs
 - Do you need special expertise?
 - Relevant examples of success
 - Aligned with one of the six Areas of Focus
- Community assessment can be covered by District Grant



Reference:

[Needs Assessment Form](#)

Areas of Focus and Goals

- Areas of Focus are focused by the trustees
- It's best to have only one Area of Focus
- Review [Areas of Focus Policy Statements](#) for alignment with your project
- Pick specific goals you will be aligned with

Reference:

[Areas of Focus Policy Statements](#)

Rotary International's Six Areas of Focus

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

Example: Policy – Water and Sanitation

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to ensure communities' sustainable access to water, sanitation, and hygiene by:

1. Facilitating universal and equitable access to safe and affordable drinking water
2. Improving water quality by protecting and maintaining surface- and groundwater resources, reducing pollution and contaminants, and promoting wastewater reuse
3. Facilitating universal and equitable access to improved sanitation and waste management services in order to achieve open defecation-free communities
4. Improving community hygiene knowledge, behaviors, and practices that help prevent the spread of disease
5. Strengthening the capacity of governments, institutions, and communities to develop, finance, manage, and maintain sustainable water and sanitation services



Steps of the Process

You can take these steps in any order

- Location
- Partner
- Beneficiaries and Needs
- Project Selection
- Area of Focus and Goals

Review these steps as you go

Review them again when you have them all in place

Define your Project – Example

Combine the work so far into a 2-sentence summary

Example:

“The Rotary clubs of Cleveland, TN, USA and LaPaz, Honduras will partner to provide potable water to the high school and surrounding community in Lejamani, Honduras. By providing a bore hole well, pump and water tank on the school property; plus hygiene training, they will serve about 4000 people who do not have access to potable water.”

Defining your Project Exercise

- What's your dream project?
- Write a summary statement.
- Include all 5 steps; make up the parts you don't know yet.

Completing a Global Grant Application



Can be Overwhelming at first

Talk to the Grants Staff member for the country of your project



Oh, no!
So much
information I
need to know!

Global Grant Application Template

Start with the on-line template, not the Grant Module

- Editable Word document
- Easy to share and collaborate
- When you have good alignment with your partners and most of the fields are complete, you can transfer to the Grant Module

References:

[Global Grant Application Template](#)



Global Grant Application Tabs / Steps

1. Basic Information
2. Committee Members
3. Project Overview
4. Areas of Focus
5. Measuring Success
6. Location and Dates
7. Participants
8. Budget
9. Funding
10. Sustainability
11. Review and Lock
12. Authorizations

Do the easy items first

Delete fields you don't need for a Humanitarian grant

1. All fields related to VTT (in Steps 6, 7, 10)
2. All fields related to Scholarships (in Steps 6, 7, 10)

Fill in the fields you can do now

- Most of steps 1, 3, 4, 5 and 6

Identify the Team Members

Step 2 Committee Members

1. Committee members for host club (in the country where the project will be implemented)
2. Committee members for international club (in another country; only one international club allowed)

Step 7 Participants

1. Cooperating Organizations (usually needed for technical expertise) MOU required.
2. Other Partners (other Rotary groups or individuals who will work on the project, usually not needed)
3. Volunteer travelers (specialists, not typical Rotarians doing project oversight, usually not needed)

Memorandum of Understanding

Step 7 Participants

Must have an MOU signed by the Host Sponsor, International Sponsor and the Cooperating Organization if there is one or two.

The MOU designates the responsibilities of :

The Host Sponsor

The International Sponsor

The Cooperating Organization

Host Sponsor's Responsibilities

- Provide technical and professional services in support of the Rotary Grant project
- Provide volunteer training, mentoring, and financial review
- Direct and coordinate local community education and public relations
- Seek community support and resources for the project
- Host visiting Rotarians who come to support or learn about the Rotary Grant project
- Manage the grant funds and pay suppliers, vendors, or contractors
- Prepare Rotary Grant project reports, in cooperation with the International Sponsor
- Measure and evaluate project activities

International Sponsor's Responsibilities

- Direct and coordinate community education and public relations
- Direct and coordinate International fundraising efforts
- Travel to the project location to provide technical or professional service
- Maintain the master schedule of event
- Contact the Host partner and (optional) cooperating organization at least monthly to discuss progress and milestones
- Assist the Host Sponsor in implementing and reporting on the Rotary grant project and ensure progress reports are timely
- Issue monthly reports to leaders of both clubs and districts, plus key people in the relationship. Include a summary of contacts, milestones and accomplishments.

Cooperating Organization's Responsibilities

- Provide expertise, infrastructure, advocacy, training, education, or other support for the Rotary Grant project
- Submit itemized expense statements and receipts to the Host Sponsor or International Sponsor for reimbursement
- Maintain sufficient records and data to complete reports to the Rotary Foundation
- Report activities and results to the Host Sponsor and International Sponsor accurately and in a timely way
- Measure and evaluate project activities
- Continue to support the project financially or programmatically after Rotary Grant funding ends

Conflict of Interest

Step 2 - See COI definition

1. Does your club have potential conflicts of interest?
2. How do you identify them?
3. How do you control them?
4. Does your partner club have potential conflicts of interest?

Project Plan

1. Develop an overall project plan with all the steps you know now. It will be used several places.
2. This plan is an important document. Identify all the steps you will need to make your project a success.
3. What elements need to be included?

Sustainability

Step 10 Sustainability

1. Start with the community assessment
2. Respect natural resources
3. Train the beneficiaries
4. Use local labor
5. Buy locally
6. Establish a maintenance plan
7. Train a monitoring group or person

Stewardship

1. Who is responsible for project funds and successful project completion?
2. How do you exercise responsibility?

Contingency Planning: Questions to ask

This is a critical part of Stewardship

1. What do you do if you have a financial overrun?
How could it happen?
2. What do you do if you have reporting issues?
3. What do you do if you have a communication problem?

Monitoring, Evaluating, and Reporting

A critical part of Stewardship

1. How will you monitor the project?
 - Observations, verbal reports, data?

2. How do you evaluate what you know?

3. Who will do the reporting?

Best Practice:

Link reporting to events, not the calendar.

Measuring Success

Step 5 Measuring Success

1. Review standard measures in the Monitoring and Evaluation Plan Supplement
2. Select standard measures
3. Consider whether you should add measures based on sustainability and contingency planning

Reference:

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



Budget

Step 8 Budget

➤ Expense Categories:

- Accommodations
- Equipment
- Monitoring and Evaluation
- Operations
- Personnel
- Project Management
- Publicity
- Signage
- Supplies
- Training
- Travel
- Tuition

Funding

Step 9 Funding

- Do you have sufficient funding for the project?
- Does your District have as many global grants as it wants?
- Does your District have funds available for more Global Grants?
- Where can you get additional funding?
- Work with your District leaders to get the funding you need

Matching Funds

Funding Example from District 6860

Administration Fee	5%
World Fund Contribution	50%
DDF Contribution 6860	400%
World Fund Match DDF	100%

Club Contribution	Administration Fee	World Fund Contribution less admin fee	DDF Contribution 6860	World Fund Match of DDF	Grant Value
\$ 3,183.10	\$ 159.16	\$ 1,511.97	\$ 12,732.40	\$ 12,732.40	\$ 30,000.72
\$ 10,000.00	\$ 500.00	\$ 4,750.00	\$ 40,000.00	\$ 40,000.00	\$ 94,250.00

Resource: Appendix “E” – District 6860 Leadership Plan

- Please see appendix “E” in the District Leadership Plan for the district’s requirements for Global Grants.
 - This document outlines the procedures that District 6860 will undertake to comply with requirements specified by The Rotary Foundation in the District Memorandum of Understanding. Additionally this document outlines the steps that the clubs of district 6860 will undertake to comply with district 6860 requirements as outlined in the Club Memorandum of Understanding (Club MOU).
- Includes global grant matching funds chart
- Includes instructions for requesting DDF from District 6860
 - ****Prior to receiving DDF funding approval, the club must submit a formal written request to the DRFC and the District Governor.
- [District Leadership Plan - Appendix "E"](#)

Approval Steps

- The two primary contacts (see Tab 1) review and approve and then the application is LOCKED (Tab 11)
- All contributing Districts approve the DDF. (DG and DRFC in Tab 12)
- The lead Districts DRFCs approve the grant for TRF compliance (Tab 12)
- The application is SUBMITTED.
- Partners sign to confirm acceptance of responsibility.
- The application is reviewed, maybe revised, and APPROVED.
- Partners set up banking instructions.
- TRF transfers funds to the project bank account.



Reference:

[Global Grant Lifecycle](#)

Resources

- [Grant Center Resources](#)

District 6860 Rotary Foundation Team

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Certificate of Completion

Please go to [THIS LINK](#) on the District 6860 website and download this file:
Global Grant Training - Certificate of Completion.docx.

Fill out and sign this document and send it to Joe Perez at
joepa3476@bellsouth.net.