



## **ROTARY DISTRICT 5960 GRANTS TEAM GLOBAL GRANTS APPROVAL/PROGRESS GUIDELINES**

**Applicability:** These guidelines apply to any global grant for which District 5960 has been requested to contribute District Designated Funds (DDF) of \$2,500 or more, regardless of whether a D5960 club is the international partner.

**Deadline for submission of requests for approval of DDF funding:** All Global Grant proposals will be presented for review to the Grants Team on the third Friday of September each year. The deadline for submitting a request to the Grants Team is August 1.

**Request for Mentor to assist with Grant submission:** Before a Global Grant can be presented to the Grants Team, the primary sponsor club must request a grant mentor that will assist the process to ensure all required information is gathered. A mentor can be requested at any time prior to August 1 by sending communication to Grants Team Leader or District Rotary Foundation Team Leader. This communication and request should include a brief description of the potential grant.

**Eligibility for Global Grant Proposals:** In order for a club to be eligible for a grant to be considered, they must meet the following qualifications:

- Have attended a District 5960 Grants Management Seminar for the year in which the grant will be proposed
- Have successfully submitted the Rotary Foundation Memorandum of Understanding and D5960 Addendum
- Have attended a District 5960 Global Grants Workshop. Note: This step is not required if A) the club is contributing to a grant sponsored by a fellow D5960 club, or B) the club is contributing less than \$2,500 to a grant sponsored by a club outside D5960.
- Is current on reporting for all previous Global or District Grants the club has sponsored or participated in.

**Information required to be completed by August 1:** In order to be qualified to present at the September grants review meeting, a club must present the following information to show that the Global Grant has been well prepared and thought out:

- Host Club and Contacts identified (at least TWO contacts from the host club should be listed)
- Are the Host Club and District qualified through TRF? (Grants Team can assist in checking)
- COMPLETED Needs Assessment
- Beneficiaries of project
- TRF Area of Focus
- Explanation of grant sustainability
- Training Plan (if necessary)
- Preliminary budget

- Preliminary financing page (including DDF requested)
- Preliminary fund dispersal plan

Progress: Once the Grants Team has approved DDF for a Global Grant, progress reports will be due for review at the Grants Team meetings in December, March and June. Progress reports are due to the mentor by the 1<sup>st</sup> day of the month in which the Grants Team will be reviewing, with the mentor submitting the report to the Grants Team Leader at least one week prior to the meeting. Progress reports shall include progress on the application in the online TRF grants portal, progress towards obtaining funding, and disclosure of any issues that have arisen. The Main Contact for the grant is not required to attend the Grants Team meetings to present the progress report but may be asked to attend if there is enough reason to warrant deeper discussion as determined by the Grants Team.

Progress milestones: To ensure proper ongoing progress, there are suggested milestones that should be reached when progress reports are submitted:

- First progress report (due 12/1): The application should be fully entered in the TRF Grants portal and is in draft status, a Global Grant ID number has been issued, and there are commitments for at least 25% of club funding
- Second progress report (due 3/1): The application should be in “authorizations needed” status on the TRF Grants portal, and there are commitments for 100% of the needed club funding (required for a grant to be put in “authorizations needed” status)
- Third progress report (due 6/1): The application should be approved by The Rotary Foundation, meaning 100% of funding has been completed and all TRF questions have been successfully answered

Consequences of missing progress milestones: Failure to meet the progress milestone at the NINE MONTH anniversary (June meeting) of an approved grant will result in revocation of D5960’s commitment to provide DDF to the Global Grant. Additionally, failure to timely provide more than one progress report may result in the revocation of D5960’s commitment to provide DDF to the Global Grant. The Grants Team has discretion to determine if any issues that have been disclosed in progress reports provide justification for Grants Team to provide an extension and delay revocation of D5960’s commitment of DDF to a determined future date.

Ongoing Rotary Foundation Progress Reports: Once a Global Grant is approved and fully funded, the sponsoring club is required to provide ongoing progress reports to The Rotary Foundation. If a club is delinquent in providing these reports to TRF as required, the club will not be eligible to sponsor a new District or Global Grant.

Grants Team DFF Allocation Criteria: The Grants Team will use a matrix that takes in to account several factors when determining how District Designated Funds will be distributed to grant proposals. These factors include: amount of Rotary Foundation Annual Fund contributions over the previous three years, Global Grants sponsored in the previous three years, participation in funding of other Global Grants in the previous three years, and a subjective ranking by Grants Team members based on their feelings of the impact/scope of grant.

Questions or More Information: Please contact:

- Margie Horning, District Grants Team Leader, [Margie.horning@comcast.net](mailto:Margie.horning@comcast.net)
- Kyle Haugen, District Rotary Foundation Team Leader, [jkylehaugen@gmail.com](mailto:jkylehaugen@gmail.com)