



ROTARY DISTRICT 5960 GRANTS TEAM GLOBAL GRANTS APPROVAL/PROGRESS GUIDELINES

Purpose: companion document to [Global Grant Quick Reference Guide 2023-24](#)

Applicability: These guidelines apply to any Global Grant (GG) 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: The deadline for submitting Global Grant proposals for the 2023-24 Rotary year is May 19, 2023. All proposals will be presented for review to the Grants Team at a special meeting on June 2, 2023. If the proposal is approved on June 2, 2023, D5960 DDF will be preliminarily allocated to the grant project. Final contingent* DDF allocation is not achieved-until the Grant application has been completed and approved by The Rotary Foundation.

If all available DDF is not awarded on June 2, 2023, a club may come forward later during the year with a request to fund a contribution to another district's Global Grant. After the Grants Team has vetted and approved the project, D5960 would match the club's contribution 1 to 1 subject to funds availability. If the request is more than \$2,500, the D5960 contributing club must be qualified to sponsor Global Grants during 2023-2024.

Request for Mentor to assist with Grant submission: Before a Global Grant proposal can be presented to the Grants Team, the primary sponsor club must request a D5960 grant mentor who will assist in the process to ensure all required information is gathered. A mentor can be requested by sending communication to Grants Team Leader (Jim Hunt jim.hunt.d5960@gmail.com) or District Rotary Foundation Team Leader (Margie Horning Margie.horning@comcast.net) and should include a brief description of the potential grant.

Eligibility for Global Grant Proposals: In order for a club to be eligible to sponsor a Global Grant proposal, they must meet the qualifications as outlined in the [Global Grant Quick Reference Guide](#).

Information necessary to submit a properly prepared proposal:

- Prepare the proposal using the [global grant application template](#)
 - **DO NOT** complete the application on the RI website...use the template
- Identify Host Club and 3 Contacts for each sponsor.
- Determine if the Host Club and Host District are qualified through TRF. (Grants Team can assist in checking)
- COMPLETE the required [Needs Assessment](#)
- Specify a [TRF Area of Focus](#) (see www.rotary5960.org for specific guidance on each area of focus)
- Explain grant sustainability for the chosen Area of Focus (refer to specific Area of Focus documents)
- Training Plan (brief / general information, if applicable)
- Preliminary budget

- Preliminary financing page (including DDF requested)

Application Process: Once the Grants Team has approved contingent DDF for a Global Grant, you can begin the formal application process using the [The Rotary Foundation \(TRF\) portal](#) at www.rotary.org

Application Progress Reports: Progress reports shall include (a) progress on the entry of the application into the online TRF grants portal, (b) progress towards obtaining funding, and (c) disclosure of any issues that have arisen. Progress reports will be due for semi-annual review at the Grants Team meetings in January and July. Progress reports must be submitted to the mentor by the 1st day of the reporting month, with the mentor submitting the report to the Grants Team Leader at least one week before the D5960 Grant Team meeting. 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.

Application Progress Milestones: To ensure the satisfactory progress of the GG application that will be submitted to TRF for approval, the following milestones should be reached when progress reports are submitted:

- First progress report (due January 1, 2024): 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 50% of club funding.
- Second progress report (due July 1, 2024): The application should be in “submitted” 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 “submitted” status)
- Third progress report (due January 1, 2025): The application should be approved by The Rotary Foundation, meaning 100% of the funding has been completed, and all TRF questions have been successfully answered.

***Consequences of missing reports and/or progress milestones:** *Unless fully discussed with a grant team mentor and approval of the grant team within 60 days of the reporting deadline, failure to meet the reporting and/or progress milestones will result in revocation of D5960’s commitment to providing DDF to the Global Grant.* The Grants Team has the discretion to determine if any issues disclosed verbally and/or in progress reports provide justification for the 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 by TRF and fully funded, the sponsoring club is required to provide annual progress reports to The Rotary Foundation. The first Annual TRF report for a Global Grant is due one year from the funding date. If a club is delinquent in providing these annual reports to TRF as required, the club will not be eligible to sponsor a new District or Global Grant until the required reporting is up to date.

Questions or More Information: Please contact:

- Jim Hunt, District Grants Team Leader, jim.hunt.d5960@gmail.com 612-720-2223
- Margie Horning, District Foundation Team Leader, Margie.horning@comcast.net 651-428-1740