

Global Grant Checklist – District 5020

Check to make sure your club is qualified. This needs to be done annually. If it is not qualified, these steps must be taken.

- The President-Elect must complete Foundation Goals, including Annual Fund, Polio Plus and Membership in My Rotary /[Rotary Club Central](#).
- The President and Vice-President must sign a [club MOU](#) at the beginning of the year.
- One club member must attend District 5020 Grants Training. This course gives specific information about how our district manages grants, and how to apply for a District Grant. Zoom classes are held in the spring before the start of the Rotary year.

Contact Barbara Barney about any club qualification questions sbarneycpa@comcast.net

Qualify Yourself – This is a new requirement for our District

Each lead Global Grant contact must take the [Grants Management Seminar](#) on My Rotary. It is divided into 10 short modules and takes 3.25 hours to complete. You will need to create a log-in if you don't already have one. If you have done some or all the modules previously it will show as "enrolled". Click on the seminar to see if it is complete or complete any missing modules.

If you have taken this previously, you will need to take the [Grant Management Recertification Seminar](#). This must be done annually.

Contact the District Global Grants Coordinator before you start. You can discuss your potential grant, and I can provide you with relevant documents and a list of contacts who can answer your questions. Different grants will need different info and will have different resource people. She can save you time finding these resources.

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District 5020 Global Grants Coordinator
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Ask questions often and throughout the planning stages. If you are not sure you are on the right track, ask! It will save you time.
Resource people are listed at the end of this document.

Download the [Guide to Global Grants](#) – it will be your bible as you develop your grant.

Download the [Terms and Conditions of Foundation Global Grants](#)

Choose your Local Partner carefully. They will perform the mandatory community assessment, be responsible for financial stewardship, monitor the project throughout its term, and do the reporting to RI. Both the club and district must be qualified.

If you don't have a partner already, you can reach out to the Regional Grants Officer in the country where you are working. They work with local clubs and can likely make a recommendation. You can also ask the Action Group for the area of focus you have chosen. A list is provided at the end of this document.

Download the [GG Application in Word format](#). You will get an overview of what is needed, use it to draft your application, and share it with funding partners and resource people. Download [here](#)

Select the Area of Focus – Refer to the [Area of Focus Guidelines](#) for information about completing a community assessment for each area of focus. If your Project involves more than one area of focus, we recommend you chose only one. The Area of Focus Guidelines can help you decide which one to pick. Links are in the resources listed below.

Do a Community Assessment – This is a crucial first step. The purpose is to meet the community your project will serve and find out what their resources, assets and needs are. You should involve all parts of the community, including leaders, elders, marginalized people and youth. You will form a partnership with these people and when you make them a part of the project planning team, they will own it and be more likely to take responsibility for sustainability.

If you haven't taken the Grants Training Seminar in the Learning Center [recently](#), you might consider re-visiting that module as it has changed considerably over the last few years. Here is the [link](#).

You will need to upload a copy of your **community assessment results** to your grant application. You can download the form [here](#)

Plan your Grant with the host club and the community. The plan should be detailed and contain a timeline, budget and financial management plan, evaluation criteria, and a sustainability plan. If purchasing equipment, buy it locally, if possible and include 3 quotes. If training is involved, you will also need the curriculum and a list of trainers and their qualifications. Refer to the Guide to Global Grants for more details on any of the above.

Write your Memorandum of Understanding. You will need a Memorandum of Understanding between the host and international clubs, and any other partners (NGO, local government, school, etc.). A sample of an MOU can be downloaded [here](#).

Global Grant Resource People

Area Grants Manager – this person works in the area your project is taking place and will ultimately be the person who reviews and approves your project. They can answer any questions you have about whether your project even qualifies for a GG, your community assessment, your Rotary partner, and many other things. They are there to help you so get to know them early. [Here is the list](#). It is long, and if you aren't sure who it should be, please ask me. ***This is possibly the most important resource you have.***

Area of Focus Guidelines for Global Grant Management

[Water and Sanitation](#)

[Maternal and Child Health](#)

[Basic Education and Literacy](#)

[Disease Prevention and Treatment](#)

[Community Economic Development](#)

[Peacebuilding and Conflict Prevention](#)

[Environment](#)

Cadre of Technical Advisors is a network of over 600 Rotarians and others who offer professional skills and technical expertise in the areas of focus to members who are planning and implementing projects.

If you would like to receive guidance on project planning or implementation from a cadre member familiar with your project type, please contact cadre@rotary.org.

Rotary Action Groups are independent, Rotary-affiliated groups made up of people from around the world who are experts in a particular field, such as economic development, peace, addiction prevention, the environment, or water. They can help you with your project, find funding partners, and much more. You can find a list of them [here](#)

DISC – District International Service Committee – a great resource to learn, get inspired, and collaborate with others on projects. They meet semi-monthly. Contact Mary Coward to be put on their mailing list to receive notices of meetings and other information. marycoward@shaw.ca

Groups in our District who collaborate on projects and funding

There are clusters of clubs who collaborate on projects in the District. They are a great source of information and help. They may charge a fee to join, but you will be able to apply to them for funds for your projects.

- **Vancouver Island Group** – meet monthly and fund projects – contact their secretary for more information [Bev Hilton](#)
- **Water Group** – open to all members in the district interested in water projects. There is lots of expertise here. They meet monthly and fund projects. Contact [Dustin Wilson](#)