




Global Grant Checklist ✓

This document is intended as a concise step-by-step checklist of the global grant process to accompany Rotary's Guide to Global Grants and the District 5240 Global Grant Policy for RY 2020-2021, the links for which are given below.

- Originate idea for global grant project in cooperation with host club.
- Layout implementation strategy for project in cooperation with host club and cooperating organization. Be sure to give the needs assessment and project's long term sustainability careful consideration.
- Send up a trial balloon to see if you have support of the International Service Committee and Board in your club. 
- Contact host club and get their board's approval to partner.
- Contact D5240 Global Grants Committee Chair to let them know your intention and anticipated amount of DDF you'll require.
- Communicate with the host club to clarify roles of both partner clubs, including host club's responsibilities regarding a) financial management (includes establishing a separate bank account for the project, b) maintaining strict financial controls including documentation of expenditures and receipts retention and submittal, c) advise host club of D5240 Global Grant policies, and d) request that grant application not be submitted prior to D5240 approval.
- NOTE:** See Resources below for link to D5240 Global Grant Policies 2020-2021 and other helpful publications.
- Send needs assessment outline to host club for completion locally. It's often helpful to have a member of the international (i.e. your club) travel to the host country to assist in this task. 
- Establish performance measures.
- Certify that there are no conflicts of interest. 
- Establish the budget using pro forma invoices for project components.
- Start the online grant application but do not lock and submit. Your club may want to see a draft of the grant application before committing to funding.

- Obtain your club Board's approval to move ahead, and obtain a commitment for cash contribution amount from your club.
- Contact other clubs and districts for contributions of DDF and/or cash. Obtain cash contribution forms from contributing clubs that pledge cash toward the project.
- If you have questions about permissible expenditures, want clarification of the grant process, or need advice on ways to expedite approval of the grant, contact the D5240 global grants chair for help. If further help is needed, contact RI Regional Grants Officer, Cecelia Walter. She can direct you to the grants coordinator for your host country.
- Submit grant application in its final or near final form to the District Global Grants Committee for review and any necessary modifications prior to submitting it via the online process to TRF.



NOTE: THE APPLICATION SHOULD NOT BE SUBMITTED BY EITHER CLUB UNTIL IT HAS BEEN APPROVED BY D5240 GLOBAL GRANTS COMMITTEE.



- DRFC Chairman and District Governor will determine whether to approve the application and authorize use of DDF.
- If in process of review and approval by RI Grant Coordinators there is a change in the DDF being requested from D5240, inform D5240 Global Grants Committee.
- After the grant is submitted, any changes to the grant or emails from TRF concerning the grant must be forwarded to the D5240 Global Grants Subcommittee Chair to be entered into the D5240 Document Retention System.
- When the grant is finalized and locked, current club presidents and DRFCs of all districts committing DDF to the grant will be automatically be notified to authorize the grant and dispersal of DDF.
- Once the grant has been approved by TRF, notify the contributing clubs and districts and request that they send checks (most efficient and timely method) or pay their agreed



Rotary Club of Anytown	5240
Pay to the order of	Rotary Club of Anytown Sunrise
\$	1,000
One thousand and 00/100	dollars
For global grant 00000	

contribution through the Rotary website. Maintain close communication with clubs and TRF to make sure contributions are received by TRF in a timely manner.

- ❑ Throughout the implementation of the project maintain communication with the host club and cooperating organization(s) regarding progress on the grant.
- ❑ Work with host club to submit progress reports as required by TRF until the grant project is completed and the final report is submitted and accepted at the conclusion of the grant.

RESOURCES:

TRF (1000-en) A Guide to Global Grants

https://clubrunner.blob.core.windows.net/00000050008/en-ca/files/sitepage/2020-2021-global-grants/trf-1000-en-a-guide-to-global-grants/1000_guide_to_global_grants_en.pdf

2020-2021 District 5240 Global Grants Policy

<https://clubrunner.blob.core.windows.net/00000050008/en-ca/files/sitepage/2020-2021-global-grants/2020-2021-global-grants-policy/2020-2021-Global-Grants-Policy.pdf>

2020-2021 D5240 Global Grant Cash Distribution Form

<https://clubrunner.blob.core.windows.net/00000050008/en-ca/files/sitepage/2020-2021-global-grants/2020-21-d5240-global-grant-cash-contribution-/2020-21-D5240-Global-Grant-Cash-Contribution-Form-Fillable.pdf>

Rotary Grants Terms Conditions

https://clubrunner.blob.core.windows.net/00000050008/en-ca/files/sitepage/2020-2021-global-grants/rotarygrantstermsconditions/Rotary_Grants_terms_conditions_en.pdf

Each of these resources is accessible from here:

<https://www.rotarydistrict5240.org/sitepage/2020-2021-global-grants>