**ROTARY DISTRICT 5360 APPLICATION**

**DISTRICT DESIGNATED FUNDS FOR GLOBAL GRANTS 2017-2018**

First time applicants please read the instructions, which follow the application. Applications will be considered on or after the dates shown for each Award Type in the table below.

Award amounts are subject to availability and may have changed. Please contact **kurt@purplebarn.ca** for current status or individual help.

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Name of your Rotary Club

 Name of the Project

 Location of the Project: City or Area and Country.

**Anticipated Global Grant submission date**

Name of the primary contact for this project

Phone Number

e-mail

**DESCRIBE YOUR REQUEST. One application per TYPE (Tick all that apply within the TYPE)**

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| --- |
| **GENERAL – everyone to complete** |
| [ ]  | We agree that if a TRF Global Grant application has not been submitted for approval within 15 months time, we must justify to the District Grants Committee why more time should be permitted before cancellation of this DDF allocation |
| [ ]  | Our Club and the HOST club are QUALIFIED. (see Rotary5360.org for status of your club)  |
| [ ]  | We have reviewed the documents on Sustainability, Monitoring and Evaluation, Areas of Focus, and Terms and Conditions. Our project scope addresses these requirements. |
| [ ]  | Our club has no overdue reports related to District and Global Grants. |
| **TYPE A - Primary International Sponsor (LEAD) club in D5360** |
| [ ]  | **Opens April 1st, 2017** Our Global Grant Number is GG **.**  Go to the Grant Application Tool on Rotary.org to START a Global Grant and obtain this number. |
| [ ]  | Our Club’s Board has approved our contribution of $ (C$5,000 or greater) to this Global Grant on (enter date)  |
| [ ]  | Our Rotary Club will be the Primary International (or Host) Sponsor and is requesting up to **US$**15,000 in DDF allocation. **Limit 3 per club in the Rotary year.** |
| [ ]  | Our Rotary Club expects Rotary Clubs of to collaborate with us by applying for **TYPE B OR TYPE C** awards when permitted (see below). |
| [ ]  | Our Rotary Club expects to apply to **The Rotary Foundation Canada** for additional matching funds from the Government of Canada (DFATD). See the pre-application and other related documentation on www.rotary5360.org |
| [ ]  | Our Rotary Club will be the Primary International (or Host) sponsor for this Global Grant which will include a VTT (Vocational Training Team). We are eligible for an additional US$5,000 in DDF in addition to the initial award (one of the above). NOTE: The presence of a VTT will be verified prior to final approval of your Global Grant application.(Four Way Test applies!!!) |
| [ ]  | The Primary Host (or International) Club has participated in the preparation of a preliminary project scope, financing plan and budget, which must be uploaded to Rotary5360.org along with this application. |
| [ ]  | We have uploaded documentation including a SHORT description and expected results of the Global Grant and/or VTT. What needs will be met? What Areas of Focus addressed? What objectives will be fulfilled? Who will benefit? How many people will benefit? Is a Cooperating Organization involved in the implementation? Ensure a pertinent budget and financing plan is included. Provide details of VTT if applicable.  |
|  | Show the Rotary World your project in SHOWCASE. Login to MyRotary and got tohttps://map.rotary.org/en/project/pages/project\_showcase.aspx |
|  | ***WARNING:*** *Check with your Host Club that it will be “Qualified” (according to TRF Terms & Conditions) to participate in Global Grants at the time of submission of the Global Grant application.*  |
| **TYPE B - Collaborating with D5360 Lead club (your club cannot receive it)** |
| [ ]  | **Opens October 1st, 2017** Our Board of Directors on date of  approved a minimum contribution of **C$**5,000 in cash to GG which is being sponsored and managed by club name  **in District 5360. The Global Grant application must still be in process and not approved by the District Governor or District Rotary Foundation Chair.** We request DDF in the amount of **US$**15,000 be approved for support of this project.  **Limit one type B award per club in a Rotary year.** Limit of 2 Type B awards can be directed to a particular Global Grant (pooling). |
|  | **NOTE:** Since this is a collaboration with another D5360 club, the applicant only needs to upload this application to Rotary5360.org. The Primary International Sponsor Club will have uploaded the supporting documentation. |
| **TYPE C - Collaborating with any club or District GG worldwide (your club cannot receive it)** |
| [ ]  | **Opens April 1st, 2017** Our Board of Directors on  approved a minimum contribution of **C$**5,000 in cash to GG which is being sponsored and managed by club name  **in District** . **The Global Grant application must still be in process and not approved by the District Governor or District Rotary Foundation Chair.** We request DDF in the amount of **US$**5,000 be approved for support of this project. **Limit one type C award per club in a Rotary year**. No limit to number of type C awards that can be directed to a particular Global Grant (pooling). |
| [ ]  | We have uploaded a PDF of the draft Global Grant application provided by the Primary club **if outside of District 5360.** |
| **TYPE D - Donating DDF to any club or District GG worldwide. (your club cannot receive it)** |
| [ ]  | **Open June 1 to June 30, 2018** No club cash contribution is necessary but award amount will depend on availability of DDF and will be pro-rated among applicants on July 1st. Our Rotary Club is Qualified and wishes to contribute a max of US$5,000 in DDF to GG which is being managed by club  **in District     . The Global Grant application must still be in process and not approved by the District Governor or District Rotary Foundation Chair.** **Limit one type D award per club in a Rotary year**. No limit to number of type D awards that can be directed to a particular Global Grant. |
| [ ]  | We have uploaded a PDF of the draft Global Grant application provided by the Primary club **if outside of D5360**. |

**Total Amount of DDF being requested in this application**

**Applicant:**

**When this application form has been completed, upload it (and other requested documents, if any) to the website at** [**http://rotary5360.org/fv/index.php**](http://rotary5360.org/fv/index.php) **(you must LOGIN first). After it has been successfully uploaded and submitted, an email will be sent to the president of your club for approval.**

**For assistance, consult the Training Videos at** [**http://rotary5360.org/dgc/documentation.php**](http://rotary5360.org/dgc/documentation.php) **or send an email to kurt@purplebarn.ca**

**INSTRUCTIONS & TERMS**

District Designated Funds (DDF) are virtual funds which can be used for The Rotary Foundation Global Grant application. Your project MUST include a Primary Host Rotary club in a project country.

Complete the form and submit online per instructions above.

Applications are reviewed by the District Global Grants Team for completeness and adherence to District approved guidelines. You should review The Rotary Foundation expectations regarding: Community Needs Assessment, Sustainability Principles, Monitoring and Evaluation, and Terms and Conditions. Links are available on the [www.rotary5360.org](http://www.rotary5360.org) webpage under the “documents” tab.

**General Guidelines**

1. **IF YOUR CLUB IS THE PRIMARY INTERNATIONAL SPONSOR (LEAD CLUB) YOU MUST LOGON TO THE ROTARY INTERNATIONAL WEBSITE AND START YOUR GLOBAL GRANT APPLICATION WITH A MINIMUM OF YOUR PROJECT TITLE AND YOUR NAME IN ORDER TO FIX A GLOBAL GRANT NUMBER TO BE ENTERED BELOW. (see point 3 below)**
2. **IF YOUR CLUB IS A COLLABORATOR YOU MUST GET THE GLOBAL GRANT NUMBER FROM THE LEAD CLUB TO SUPPORT YOUR APPLICATION FOR DISTRICT DESIGNATED FUNDS (TYPES B,C,D BELOW). NOTE VARIOUS KEY DATES IN THE TABLE ABOVE.**
3. DDF is allocated for Global Grants as these applications are approved on a First Come, First Served basis according to guidelines approved by the District Board of Directors. Type B and C applications are only considered once the Type A application is approved. Late applications for Types B,C may be unsuccessful and force the LEAD Club to adjust their financing plan (and their scope).
4. The applicant club must be “Qualified” before May 1, 2017 - Club MOU signed, attendance by at least 1 member at a Qualification Seminar (in person or by Webinar) and have donated to The Rotary Foundation **Annual Fund** at least $50 per member average in the 2016-2017 Rotary year.
5. A Qualified club may submit multiple Type A applications in any Rotary year, subject to the availability of DDF. (see table above)
6. Grants from the Alberta Community Initiatives Program (CIP) can be included within GG applications as club cash. Do NOT mention the source as CIP.
7. If the Primary International Sponsor has outstanding reports for open District or Global grants, DDF allocation will be denied until reporting is in compliance. TRF will not approve any Global Grant applications if the lead clubs have overdue Global Grant reports.
8. The Goal is to allocate all DDF each year. No more than 10% is permitted to be carried over and only in exceptional circumstances.
9. In the Global Grant application itself, TRF will levy 5% administration fee on cash contributions from Rotary clubs and 10% administration fee on third party contributions. In your financing plan, please ensure the net cash contribution and DDF meet the TRF minimum award of USD15,000 Note: if the Rotary Club contributions are sent directly to the project bank account, no administration fee is levied.
10. THE DISTRICT GRANTS SUB-COMMITTEE MAY MODIFY ALLOCATION AMOUNTS AND LIMITS AT ANY TIME ACCORDING TO GUIDELINES APPROVED BY THE DISTRICT BOARD OF DIRECTORS.
11. For any type of grant submitted for approval, a club must have satisfied all the criteria for qualification first. To be clear, any Club submitting a Type A or C application on or after April 1, they must have completed the qualifications before the date of submission.

EXAMPLE OF COLLABORATION – a Global Grant involving multiple D5360 clubs will contain ONE type A award and may be supported by up to 2 type B awards, unlimited type C awards and unlimited type D awards. The table below only considers what 2 other collaborating clubs might do to assist the lead club, exploiting the pooling). Additional clubs can participate with Type C and Type D awards.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Source** | **DDF Award Type** | **Club Cash (USD)** | **CIP Grant (USD)** | **DDF award (USD)** | **TRF AWARD (USD)** | **Extended** |
| **Total (USD)** |
| **Club 1** | **A** | **5,000** |   | **15,000** | **17,500** | **37,500** |
| **Club 1** | **VTT** |   |   | **5,000** | **5,000** | **10,000** |
| **Club 2** | **B** | **5,000** |   | **15,000** | **17,500** | **37,500** |
| **Club 3** | **B** | **5,000** |   | **15,000** | **17,500** | **37,500** |
| **Club 2** | **C** | **5,000** |   | **5,000** | **7,500** | **17,500** |
| **Club 3** | **C** | **5,000** |   | **5,000** | **7,500** | **17,500** |
| **Total** |  | **25,000** |   | **60,000** | **72,500** | **157,500** |

NOTE: If the total TRF award exceeds USD50,000, the Technical Cadre must review and approve your Global Grant application, introducing further time delays in the project schedule. In addition, if the total TRF award exceeds USD100,000 then the trustees need to approve the application, introducing additional time delays.

SEE FOLLOWING LETTER FOR APPROVED PROCESS FOR DEALING WITH CIP MATCHING

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**Rotary International District 5360**

#2506 246 Stewart Green S.W

Calgary, AB, Canada T3H 3C8

Tel: (403) 670 – 2624 Fax: (403) 270 – 1899

Email: rotary@operationeyesight.com

**ROTARY INTERNATIONAL**

 **DISTRICT 5360 INC.**

May 28, 2011

Alberta Community Initiatives Program

Edmonton, AB

Attention: Ms Jackie Switzer

Dear Jackie,

**Regarding Rotary District Designated Funds (DDF)**

We, as Rotarians in District 5360 (Alberta, south of Ponoka), are grateful for the support that the Government of Alberta has given to our clubs when doing international projects, first through the Wild Rose Foundation and now through the Community Initiatives Program. We also very much appreciate your confidence in how Rotary Clubs perform with the CIP support.

As a preamble to the pertinent topic, an introduction may help. Rotary Clubs in District 5360 raise funds mostly in Alberta. Most of these funds go to support Alberta charities, schools and hospitals with a much smaller percentage allotted to international projects. Alberta Rotary Clubs like to leverage their funds that are allotted to do international projects and they do this by applying for matching funding from CIP or The Rotary Foundation (TRF) or sometimes both – where CIP funds are further leveraged through The Rotary Foundation.

One of the annual fundraising methods is for Alberta Rotarians to donate personal funds to The Rotary Foundation Annual Programs Fund. These funds are held IN TRUST at The Rotary Foundation for a period of 3 years, after which District 5360 will be given control of 50% of the initial donated amount – these are called District Designated Funds (DDF) and each year the District will have access to an amount that is 50% of the donations from 3 years ago.

District Designated Funds (funds raised in Alberta) are managed by our District Grants Committee and there are 2 avenues for use.

1. Clubs in District 5360 can apply for small amounts of DDF to do club projects (matching $1,000-$5,000). This is actual cash transferred back into Alberta from the Rotary Foundation. They are called District Project Grants.
2. Clubs may apply to the District Grants Committee for a larger amount of DDF to do Global Projects-which must be international, include leveraging from the Rotary Foundation and be under the control of a Host Rotary Club in the implementing country. While this DDF are raised in Alberta, they are held at The Rotary Foundation and can only be accessed with a Global Grant application which when successful, arranges transmission of all funds to the Host Rotary Club’s dedicated project bank account.

**The Issue**

Alberta clubs apply to CIP to match their funds raised in Alberta. In many cases these funds are resident in the club bank account and the paper trail is obvious from financial statements. However, clubs doing large projects will want to apply to both CIP and The Rotary Foundation and on the CIP application, in addition to club funds, they will want to include a DDF portion for CIP matching, which are funds raised in Alberta (3 years past) and now resident in The Rotary Foundation IN TRUST. The issue is the transparency of the paper trail and CIP ability to demonstrate that these DDF funds were actually included in the project.

**The Process (APPROVED BY MS JACKIE SWITZER)**

The following process, satisfactory to CIP, will be distributed to all District 5360 clubs. This process pertains only to Alberta clubs applying to both CIP and to The Rotary Foundation for matching funds.

1. The CIP application must show all sources of funding-various club funds, DDF and the leveraged amounts from both CIP and TRF. This is the project total amount and will be supported with a spending plan.
2. Should CIP award an amount less than requested on the club application, the club MUST submit a revised funding plan and spending plan which their Final Report will use.
3. Any CIP award for a project showing DDF on the CIP application must be conditional on the project receiving a Global Grant from The Rotary Foundation. If a Global Grant is not received, the Alberta Rotary Club will be required to contribute the entire matching grant amount themselves from their club’s fundraising or return the portion to CIP that they are unable to match.
4. The club’s Global Grant application to TRF will be approved by the club President and our District 5360 Governor and District Rotary Foundation Chair, a standard approval process now in place.
5. Once approved by TRF and on receipt of Alberta and other Rotary club funds and also the CIP funds, TRF arranges the transfer of the various funding streams to a dedicated project bank account controlled by the Host Rotary Club.
6. The Final Report to CIP must include copies of the cheque and wire transfers of club and CIP funds to The Rotary Foundation or in some cases directly from a club to the dedicated project account. The Final Report will also include a copy of the instructions to TRF to transfer funds and a copy of the Host Rotary Club project bank statement(s) showing the deposited funds which will match the funding plan on the original or amended CIP application.

 **(Cont’d on next page)**

