

Partnership for community development

A Government of Canada and Rotary Foundation Canada Partnership



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**INTRODUCTION:**

The Rotary Foundation (Canada) (“TRFC”), on behalf of Canadian Rotarians and the Department of Foreign Affairs, Trade and Development (“DFATD”), on behalf of the Government of Canada (“GOC”), have entered into a five year agreement to jointly financially support Rotarian humanitarian actions. This new Partnership Agreement will extend nearly three decades of GOC support for Canadian Rotarians' efforts to "Do Good in the World".

The Partnership Agreement will run for the GOC financial year 2015-16 to and including 2019-2020. DFATD will provide an annual grant of $1.2 million (CDN) towards this partnership. This Canadian initiative will be fully integrated into Rotary’s global grant program, but with some additional measures to meet GOC requirements. TRFC and The Rotary Foundation (“TRF”) will collaborate in the administration of this program. Participation in this program is voluntary.

**PROJECT ELIGIBILITY:**

This Partnership will support humanitarian and development initiatives that are of common areas of focus and countries of interest based upon Rotary’s areas of focus and DFATD’s mandate. In keeping with the GOC’s development objectives, particular attention will be paid to the cross-cutting themes of gender equality, environmental sustainability and good governance. Most, but not all of the activities that can be undertaken with global grants will be eligible for funding under this Partnership. The program will focus on efforts designed to reduce poverty, promote economic development, improve health (especially maternal and child health), promote literacy and empower women.

1. **Location:** Global grant projects proposed in any developing country eligible for Official Development Assistance and also eligible for grant activity per TRF global grant guidelines, are eligible for funding under this Partnership Program. The GOC has identified countries that are a priority for Canadian development programming. While projects targeted at those countries will not receive preferential treatment, there will be an expectation that most global grant projects do occur in these countries.
2. **Countries of Focus:** Countries that DFATD has determined to be in greatest need and will benefit the most from development assistance.

DFATD has the following Countries of Focus:

Afghanistan, Antigua and Barbuda, Bahamas, Bangladesh, Barbados, Belize, Benin, Burkina Faso, Colombia, Congo, Dominica, Ethiopia, Ghana, Grenada, Guyana, Haiti, Honduras, Indonesia, Jamaica, Jordan, Mali, Mongolia, Montserrat, Mozambique, Myanmar, Philippines, Peru, Saint Kitts and Nevis, Saint Lucia, Saint, Vincent and the Grenadines, Senegal, South Sudan, Suriname, Tanzania, Trinidad and Tobago, Westbank and Gaza, Ukraine & Vietnam.

1. **Partner Countries:** Countries where DFATD has established partnerships and has determined a thematic focus for development programming in collaboration with the governments of those countries. Project proponents should review the DFATD information on its website before proposing an initiative for these countries.

<http://www.international.gc.ca/development-developpement/index.aspx?lang=eng>

Partners Countries include:

Bolivia, Cuba, Egypt, Kenya, Guatemala, Iraq, Malawi, Morocco, Nicaragua, Nigeria, Pakistan, Sri Lanka, and South Africa.

1. Please note that that the global grant eligible countries may differ from those that would otherwise be eligible for GOC funding. The project country must be eligible for funding by both TRF and GOC.
2. **Project Types:** Projects related to five of Rotary's six areas of focus are eligible for funding under this Partnership Program. These are: economic and community development, disease prevention and treatment, maternal and child health, water and sanitation, and basic education and literacy.
3. **Anticipated Activities:** The following list of project possibilities are based upon Canadian Rotary clubs’ and districts' past initiatives and are meant to be illustrative of potential program projects, but not in themselves a limit on future projects.

Potential projects include:

1. Establishing micro-credit programs,
2. Training local economic development facilitators,
3. Assisting small entrepreneurs establish bank accounts,
4. Increasing vocational training capacity,
5. Establishing pre-natal and other health education programs,
6. Providing mobile health equipment (but not vehicles),
7. Training health staff in use and maintenance of new equipment,
8. Providing community education on safe water, sanitation and hygiene,
9. Creating and training local water and sanitation governance committees,
10. Delivering training on sustainable agriculture,

Potential projects (continued):

1. Equipping schools with classroom furniture, libraries, computer labs & recreational equipment,
2. Upgrading teaching skills of teachers and trainers,
3. Training local adult education instruction teams,
4. Providing adult education supplies, and
5. Organizing community development and capacity building training for Rotary clubs.
6. **Project Restrictions:** The agreement with DFATD has three major eligibility restrictions: scholarships; construction activities of any kind; purchase of vehicles and major medical equipment purchases.
7. **Project Size:** As this Partnership Program is to be integrated into the global grant program, the range of project size will be governed by the applicable minimum and maximum TRF global grant contributions. In an effort to support some smaller, as well as larger projects, the grants will be limited to a maximum of $100,000 (USD) with a maximum of $400,000 (USD) for all the grants in excess of $75,000 (USD). This limit for major grants may be revised from time to time.
8. **Project Time-frames:** The expectation is that the smaller projects, less than $80K (USD) will be completed within 24 months of approval and the larger projects within 36 months of approval.
9. **Additional Requirements:** The GOC’s current international development objectives have been in pursuit of the UN’s Millennium Development Goals. As a result, there are three cross-cutting themes that all funded projects must take into account. These are: Gender Equity; Environmental Sustainability; and Good Governance. They are not a specific requirement of the global grant program. However, they must be addressed in this Partnership Program.

This will mean undertaking an assessment of the status of gender equality, the local environment, and governance capability prior to applying for funding from this program. It will also require building elements into the project proposal to address these issues and considering at the outset, the information that will need to be gathered to demonstrate progress upon completion of the project. TRFC will develop guidelines and tools to assist with these processes.

**FUNDING MODEL:**

The funding model is designed to be integrated into the existing global grant structure, but in such a way that both partners are in effect leveraging each other's contribution. Also, this program has been designed so that the funding model is predictable and easy to calculate. The GOC contribution will be considered as a "cash" contribution to the project.

As with all global grant requests, the Rotary club(s)’ contributions will be the starting point. Then if the district(s) chooses, it may agree to allocate some of its District Designated Funds (“DDF”) to the project according to TRF and its policies. Then, presuming the project is eligible under this Partnership Program, the Canadian Rotary Club project proponent may request that TRFC allocate GOC funds to the project. This will be done on a 1 to 1 match for club and any allocated DDF, so long as sufficient GOC funds are available. The project proponents may then request a World Fund allocation, which would be on a 1 to 2 ratio for the club and GOC funds, and on a 1 to 1 ratio for any DDF contribution.

**Examples:**

1. This example illustrates the Funding Model as applied to a small project where the district has allocated DDF on a 1 to 2 ratio.

|  |  |
| --- | --- |
| 1. Rotary Club Cash | $ 10,000 |
| 1. DDF ($1 to $2 for A) | $ 5,000 |
| 1. GOC Funds ($1 to $1 for A + B) | $ 15,000 |
| 1. World Fund ($1 to $2 for A + C) | $ 7,500 |
| 1. World Fund ($1 to $1 for B) | $ 5,000 |
| **Total Available for the Project** | **$ 42,500** |

1. This example illustrates the Funding Model for a small project where the district has allocated DDF at a 1 to 1 ratio.

|  |  |
| --- | --- |
| A> Rotary Club Cash | $ 10,000 |
| B> DDF ($1 to $2 for A) | $ 10,000 |
| C> GOC Funds ($1 to $1 for A + B) | $ 20,000 |
| D> World Fund ($1 to $2 for A + C) | $ 15,000 |
| E> World Fund ($1 to $1 for B) | $ 10,000 |
| **Total Available for the Project** | **$ 65,000** |

1. This example illustrates the Funding Model as applied to a medium sized project where the DDF contribution has been capped at $10K.

|  |  |
| --- | --- |
| 1. A> Rotary Club Cash | $ 40,000 |
| 1. B> DDF (with cap) | $ 10,000 |
| 1. C> GOC Funds ($1 to $1 for A +B) | $ 50,000 |
| 1. D> World Fund ($1 to $2 for A + C) | $ 45,000 |
| E> World Fund ($1 to $1 for B) | $ 10,000 |
| **Total Available for Project** | **$ 155,000** |

**ROTARY FOUNDATION ADDITIONAL CONTRIBUTIONS:**

The GOC funds administered by TRFC are considered a cash contribution to the project. TRFC, rather than the Rotary club(s), will be responsible for funding and forwarding the appropriate additional contribution amounts to TRF with respect to the approved GOC project funds. Please note that the Rotary club(s) will still be responsible for the 5% “additional contribution” related to its own cash contribution.

**APPLICATION CALL:**

TRFC will initiate an annual call for projects that will be in effect until such time as the funds are expended. Except for the initial launch in 2015, the application call will be made well in advance of the commencement of Rotary's next operating year. Project applications will be considered on a first come, first served basis. However, please note that funds for this Partnership Program will not be locked in, until the global grant application receives final approval

**APPLICATION PROCESS:**

The application and approval processes have been designed to rely as much as possible upon the global grant process and do so in a manner that is efficient and effective for Rotary clubs and for Rotary staff, while taking into account the DFATD requirements. The latter will require one step in addition to the global grant application process.

As a first step in the process, it is recommended that the Rotary club or district project committees contact their district Rotary Foundation grant committee to seek their advice as to whether the intended project will be eligible for a global grant and the potential amount of DDF support. Then, the project sponsoring club or district must seek preliminary project eligibility approval from TRFC.

This will require the project proponents to provide TRFC with a brief summary of the purpose, expected project activities, estimated financial request of the TRFC and the locale of the project. In addition, the proponents will be required to provide some advanced information with respect to the project and DFATD's three overall concerns with respect to gender equality, environmental sustainability and governance.

In essence, this DFATD requirement is an enhancement of the community assessment approach set out in the Rotary Foundation Grant Management Manual, but must be completed in advance of requesting the preliminary eligibility approval from TRFC. Information, with respect to these three matters, and an application template will be made available by TRFC to facilitate compiling this additional information.

Upon receipt of this information, TRFC will determine the ***eligibility in-principle***of the project to access GOC funding and so advise the Rotary club or district and TRF staff. TRFC will also indicate whether there remain sufficient GOC funds at the time. Where approval *in-principle* is given, the project proponents may proceed with their global grant application, including the GOC funding request per the funding model. Where the project is found to be ineligible, TRFC will advise the proponents as to the reason(s) it is ineligible. If the project proposal can be adjusted to meet the eligibility requirements, the proponents may re-submit to TRFC.

Upon receipt of a positive TRFC response, the proponents may proceed to submit the regular on-line global grant application. Upon receipt of the actual global grant application, it will be reviewed by TRF grants staff and where considered complete and eligible, forwarded to the TRFC for final consideration. TRFC will advise TRF grants staff, who will notify the proponents in the same manner as for any other global grant request.

**IMPLEMENTATION, MONITORING, REPORTING AND STEWARDSHIP:**

All of the global grant requirements with respect to administration, reporting and stewardship are applicable to this program. Project proponents should ensure that they have everything in place to fully comply with the global grant requirements. There will be one additional requirement, which is that in addition to the final project report filed with TRF, a separate report with respect to the project's impact on gender equality, environmental sustainability and governance must be filed with TRFC. A reporting template will be provided by TRFC. Please note that on occasion, TRFC may request additional information to be submitted with respect to global grant reports.

**PROGRAM PUBLICITY:**

Over the duration of this Partnership Program, TRFC and DFATD may wish to publicize the good works of the Partnership. Consequently, TRFC may request stories, information and photos from project proponents during or following the completion of a project.

**TRFC-DFATD PARTNERSHIP PROGRAM INFORMATION:**

Partnership program information will be available on TRFC's website: <http://portal.clubrunner.ca/100984>.

Inquiries and other correspondence regarding this program may be sent to TRFC electronically via the designated email address: [**grantstrfc@gmail.com**](mailto:grantstrfc@gmail.com)