

Cluster Funding

Rotary Clubs of D7090 Ontario

Rev 2023

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Rev 2023

Cluster Fund Description

Cluster Funding is an effort by the Rotary Clubs of the D7090 Ontario Region to come together and help educate and expedite clubs to do a Rotary Global Grant Project. Cluster Funding is an effort to take advantage of the multiplier effect of Rotary's District and Global Grant system. Cluster Funding will allow different clubs to contribute smaller amounts of funds that can be combined by many clubs to have the greatest good for a community need.

There are 8 areas and 34 Rotary clubs in the Ontario Region. Cluster Funding can result in each club contributing \$1,000 (US) and voting to support one project.

District contributions are based on a matching amount of the club contribution, up to a maximum of \$10,000USD. The RI matching amount is 80% of the district contribution. If 22 clubs contribute to the Cluster Fund, the multiplier effect yields \$40,000 to the project budget.

The idea is that clubs will generate a project idea that should be the sponsored project. During a meeting in September / October all clubs will present their ideas for a shared project. All clubs will vote for the best project and receive all the funding from the cluster of clubs. Even if your club did not win, your members can assist in managing the project.

Objectives of Cluster Funding:

- The obvious: to allow Rotary 7090 Ontario Clubs to do "good" with smaller contributions.
- To allow clubs that normally have little funds to work on worthy projects with more meaningful results
- To exchange ideas
- To assist clubs to discover ways to participate in worthy projects
- To educate clubs to know and understand the District and International Rotary Grant system.
- To bring together the Ontario Rotary Clubs of 7090 to get to know each other.
- "It's not about the project or the club; it's about working and learning together!"

An Example of the Multiplier Effect of Rotary Funding

Based on a \$1,000 contribution from each club and matched by District (to Max) and RIF to max of 80%

Number of Clubs	Clubs	District @ 100%	RIF @ 80%	Total
8	*\$8,000	\$8,000	\$6,400	\$22,400
9	9,000	9,000	7,200	25,200
10	10,000	10,000	8,000	28,000
11	11,000	10,000	8,000	29,000
12	12,000	10,000	8,000	30,000
13	13,000	10,000	8,000	31,000
14	14,000	10,000	8,000	32,000
15	15,000	10,000	8,000	33,000
16	16,000	10,000	8,000	34,000
17	17,000	10,000	8,000	35,000
18	18,000	10,000	8,000	36,000
19	19,000	10,000	8,000	37,000

20	20,000	10,000	8,000	38,000
21	21,000	10,000	8,000	39,000
22	22,000	10,000	8,000	40,000

*Each club will contribute \$1,050; 5% is the extra that is Charged by RI for admin fee (All USD)

Annual Cluster Fund Schedule

	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A
1. Awareness / Report meeting	☑														
2. Qualify for Sponsoring Global Grant	☑	☑	☑												
3. PLEDGE Submitted				☑											
4. Club Project Research and Decide				☑	☑	☑	☑	☑							
5. Submit RI's MOU								☑							
6. Submit RI Application - Global Grant								☑							
7. Selection Meeting									☑						
8. Grant Review for Approval									☑	☑	☑	☑			
9. Project Execution (on Going)												☑	☑	☑	☑

The PLEDGE is a requirement

The PLEDGE is a necessary part of the process in order to ensure the success of a project. The host and/or international partner depends on the financial contributions of every club to prepare the budget for the project. The PLEDGE commits the club to support the project regardless of when the project is approved, which may take place in another Rotary year.

Clubs must be aware that the pledge is a promise to pay that could take several years to payout. The RI scrutiny of a project application is detailed and time consuming. The reason that Rotary's grant success rate is so high is because of this scrutiny. The speed of the application approval is highly dependent on the Sponsor and Host cooperation and coordination to ensure all requirements are met. From the time of submission to grant approval can take several years if RI reviews are not satisfied in a timely fashion.

One critical rule is that contributions to any project should never be submitted to RI until the approval is granted. If payment is submitted prior to approval, it will not be refunded if the approval is denied, or the project is cancelled. This means that all pledges must be reserved in a club's finances in case the approval takes longer than the present fiscal year.

How to select a project

Guidelines:

- Not an existing project
- Likelihood of success
- Initiated and owned by Host Rotary Club
- Communication with Host Club
- Low overheads
- Adheres to the Rotary Foundation guidelines
- Sweat equity possibilities
- Includes an area of focus

Sources of projects

- Club Member visits, Host Club Contacts
- Foundation Area Co-ordinators
- District Grant Committees / Foundation Chairs
- District International Service Projects Chair
- My Rotary (Tool): www.rotary.org/myrotary/en/take-action/develop-projects
- Rotary Showcase: https://map.rotary.org/en/project/pages/project_showcase.aspx
- Rotary Action Groups: (i.e. www.wasraq.org/)
- Matching Grants: <http://www.matchinggrants.org/>
- Project Fairs, District Conferences, RI Convention. Zone Meetings
- Areas of Focus Handbook

Projects must:

- Adhere to one of the 7 Rotary Areas of Focus
 - Fighting disease,
 - Providing clean water,
 - Saving mothers and children,
 - Supporting education,
 - Growing local economies.
 - Promoting Peace (Gov't of Canada Grant will not apply if this is focus)
 - The Environment
- Minimum of \$30,000USD Budget
- Have Sustainability
- Initiated and owned by a **Qualified** Host Club

Host Club is critical to success. It must:

- Show excitement and passion
- Communicate often and promptly
- Provide requested information
- Go above and beyond
- Contribute financially or actively seek project funds

Eligibility to present at a cluster fund selection meeting club must:

Present the following information:

- Sponsor & Host Club details
- Proposed project cost
- Area(s) of Focus
- Cooperating Organization
- Project description
- Sustainability Consideration check
- Club concept approvals

There is often more than one winner. Projects that are not winners often receive additional funding from clubs that simply want to support a great idea. These side deals are made outside of the cluster funding process.

Cluster Funding Project Annual Schedule

Jan / Feb	<ul style="list-style-type: none">• Engage Club• Progress Report on previous selection
Feb to April	<ul style="list-style-type: none">• Club to Qualify for Global Grant
May 1st	<ul style="list-style-type: none">• Submit Pledge
May to August	<ul style="list-style-type: none">• Investigate / select / plan a project• Plan \$1,050 US in budget in next year's Budget• Plan Project• Get commitment from Host Club• Prepare Project Proposal• Draft Global Grant
Sept	<ul style="list-style-type: none">• Submit RI's MOU to district Foundation
Sept	<ul style="list-style-type: none">• Submit draft RI Application for Global Grant
Mid October	<ul style="list-style-type: none">• Cluster Grant Showcase Presentation to select project
Dec to April	<ul style="list-style-type: none">• Confirm Global Grant application• Final Funding Commitment received
---- Completion	<ul style="list-style-type: none">• Manage / Monitor / Update

After Selection: Reporting to Cluster supporters

The club with the successful project must report to all cluster supporters bi-monthly. This can be a simple email to all explaining the progress to application approval and what they have faced in gaining this approval.

PLEDGE FOR CLUSTER FUND PROJECT

TO BE SUBMITTED BY May 15, 2023 to DAVID BERRY - dberry@cogeco.ca

This Pledge is an agreement regarding your Rotary Club's participation in the Cluster Project for Ontario clubs in District 7090. To be a participating club in the 2023-24 7090 Ontario Cluster Global Grant Project, it is incumbent on your Club to agree to the following conditions:

1. Delegate one active member of your club to be a member of the 2023-24 D7090 Ontario Cluster Global Grant Project Committee and represent the interests of your Club at all meetings.
Note - Other active club members are welcome to attend the 'Project Selection' meeting but only one vote counts for each participating club.
2. Contribute \$1,000 USD (plus \$50 USD to cover Rotary Foundation administration fee). This is payable once the selected project is approved by RI. Approval might take longer than 1 fiscal year, so clubs are asked to reserve the funds if this happens.
3. If presenting a project at the project selection meeting; it is understood that your club must be qualified for Global Grants as per District 7090 requirements. Otherwise; if your club is not presenting a project for selection, Global Grant qualification is not necessary.
4. Vote to select the project to be funded - one vote per club.
5. Pay the funds (\$1050 USD) to the RI Foundation once the selected project for the Cluster Global Grant Project is approved as a Global Grant Application by Rotary International. Recognize that this could take a considerable period, so funds must be set aside to comply.
6. Take the opportunity to work with the Rotary Club whose project is selected for the Cluster Global Grant Project supported by all participating clubs.

ELIGIBILITY REQUIREMENTS:

To present a project, and to be either a host or international partner, a club must be 'qualified' to apply for a District/Global Grant by having two club members complete the RI online Grant Management Seminar/Recertification and sign off on District 7090's Club Qualification Memorandum of Understanding (The Rotary Foundation) for 2023-24. Clubs participating as a non-primary funder are not required to be qualified and are eligible for matching DDF (district designated funds).

Initial: President 2023-24: _____

President for 2024-25: _____

AGREEMENT and AUTHORIZATION

This Pledge is an agreement between the Club and the Ontario District 7090 Cluster Project Committee and acknowledges that the Club will undertake to abide by the 6 conditions listed above. By authorizing this document, the Club agrees to comply with all the conditions and requirements of this Pledge.

On behalf of the Rotary Club of _____ the undersigned agree to comply with all the conditions and requirements of the PLEDGE for the year 2023-24

Signature: _____
Club President 2023-24

Signature: _____
Club President 2024-25

Print Name: _____

Print Name: _____

Date: _____

Date: _____

Addendum #2 Presentation requirements for Project Selection

For the purpose of the Vote Meeting in September the following outline will be presented in a written application 2 weeks prior to the Cluster Selection Meeting. This will be distributed to all clubs for their review.

- Project description
- Sponsor & Host Club details
- Proposed project cost
- Area(s) of Focus
- Cooperating Organization
- Sustainability Consideration check
- Budget Details
- Club concept approvals

At the meeting each proposal will be allowed a short period of time to present their project. With time after for questions. The time allocation will depend on the number of proposals received.

Addendum #3: Global Grant Application Template

This template is required for all Global Grant applications: use to complete online application

Source: <https://my-cms.rotary.org/en/document/global-grant-application-template>

ENGLISH (EN)



GLOBAL GRANT APPLICATION TEMPLATE

The following pages outline the questions you will be asked on the online global grant application. You can use this document for planning purposes. Find the actual grant application at www.rotary.org/grants.

Step 1: Basic information

What's the name of your project?

What type of project are you planning? (humanitarian project, vocational training, scholarship)

All global grants support activities within Rotary's areas of focus.

Select the primary host and international contacts for this project.

The primary host contact lives in the country where the project, training, or study will take place. The primary international contact lives in another country. Both contacts will be responsible for all grant-related correspondence and reporting to The Rotary Foundation.

Step 2: Committee members

The committee will include at least three members from the host sponsor and three members from the international sponsor.

Who will serve on the grant's host committee?

Who will serve on the grant's international committee?

Do any of these committee members have potential conflicts of interest? If so, please briefly explain.

A conflict of interest is a relationship through which an individual involved in a program grant or award causes benefit for such individual or such individual's family, acquaintances, business interests, or an organization in which such individual is a trustee, director, or officer.

Step 3: Project overview

Tell us a little about your project. What are the main objectives of the project, and who will benefit from it?

We're only asking for a general idea of the project. Try to be as concise as possible here. We'll ask you for details later in the application.

Step 4: Area of focus

Which area of focus will this project support?

Select at least one area. Note that we'll ask you to set goals and answer questions for each area of focus you select.

- ☐ Peacebuilding and conflict prevention
- ☐ Disease prevention and treatment
- ☐ Water, sanitation, and hygiene
- ☐ Maternal and child health
- ☐ Basic education and literacy
- ☐ Community economic development
- ☐ Environment

Step 5: Measuring success

Which goals of this area of focus will your project support?

We'll ask you questions about the goals you choose, and at the end of the project, you'll report on your results for each goal. Each area of focus has its own set of goals. Select only the goals that your project will address.

How will you measure your project's impact?

Use only measures that are clearly linked to your goals and will demonstrate the project's impact on

participants' lives, knowledge, or health. Find tips and information on how to measure results in the [Global Grant Monitoring and Evaluation Plan Supplement](#). You need to include at least one standardized measure from the drop-down menu as part of your application. (Add rows as needed.)

Measure	Collection Method	Frequency	Beneficiaries

Do you know who will collect information for monitoring and evaluation?

If yes, please provide the name and contact information for that person or organization and briefly explain why this person or organization is qualified for this task. If no, please tell us how you plan to find a person or organization to complete this task.

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Step 6: Location and dates

HUMANITARIAN PROJECT

Where and when will your project take place?

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VOCATIONAL TRAINING TEAM

Give us some information on your team or teams. (Add rows as needed.)

Team name	Type	Training location	Departure - Return

SCHOLARSHIP

What are the candidate's estimated travel dates?

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Step 7: Participants

VOCATIONAL TRAINING TEAM

In this section team leaders and at least two other members must be added to each team created.

The following documents need to be uploaded for each member: their CV and [Vocational Training Team Member Application](#). Team itineraries must also be included in this step. It is the team leader's responsibility to gather, review, and upload all member documents.

The Vocational Training Team Member Application includes the following questions:

How does your educational and professional experience relate to the selected area of focus?

--

What is your role in this training? Describe how you will participate.

--

COOPERATING ORGANIZATIONS (OPTIONAL)

Provide the name, website and location of each cooperating organization.

A cooperating organization can be a nongovernmental organization, community group, or government entity. Please attach Rotary's [memorandum of understanding](#) that's signed by a representative of the organization. (Add rows as needed.)

Name	Website	Location

Why did you choose to partner with this organization and what will its role be?

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PARTNERS (OPTIONAL)

Partners may include other Rotary clubs, Rotaract clubs, Rotary Community Corps, or individuals.

List any other partners that will participate in this project.

--

VOLUNTEER TRAVELERS (OPTIONAL)

A grant for a humanitarian project can pay for travel for up to two people who will provide training or help implement the project if the necessary skills are not available locally.

Provide name, email of traveler(s).

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Describe this person's role in the project.

SCHOLARSHIP CANDIDATE

Provide name and email for the scholarship candidate. Upload the candidate's admission letter.

ACADEMIC INSTITUTION

Provide the name and address of the academic institution.

ROTARIAN PARTICIPANTS

Describe the role that host Rotarians will have in this project.

Describe the role that international Rotarians will have in this project.

Step 8: Budget

What local currency are you using in your project's budget?

The currency you select should be what you use for a majority of the project's expenses.

What is the U.S. dollar (USD) exchange rate?

What is the budget for this grant?

List each item in your project's budget. Remember that the project's total budget must equal its total funding, which will be calculated in step 9. Project budgets, including the World Fund match, must be at least \$30,000. (Add rows as needed.)

#	Category*	Description	Supplier	Cost in local currency	Cost in USD

Total budget:					

*Possible categories: Accommodations, Equipment, Monitoring/evaluation, Operations, Personnel, Project management, Publicity, Signage, Supplies, Training, Travel, Tuition

Supporting documents

Upload any documents, such as price bids or pro forma invoices, to substantiate the listed expenses.

Step 9: Funding

Tell us about the funding you've secured for your project.

We'll use the information you enter here to calculate your maximum possible funding match from the World Fund. List all of your funding, including cash contributions and District Designated Funds (DDF). (Add rows as needed.)

#	Source	Details	Amount (USD)	Support*	Total

*Whenever cash is contributed to the Foundation to help fund a global grant project, an additional 5 percent is applied to help cover the cost of processing these funds. Clubs and districts can receive Paul Harris Fellow recognition points for the additional expense.

How much World Fund money would you like to use on this project?

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Step 10: Sustainability

Sustainable projects provide long-term solutions to community problems — solutions that community members themselves can support after grant funding ends. Your answers to the questions below will help us understand the components of your project that will make it sustainable.

HUMANITARIAN PROJECTS – PROJECT PLANNING

Describe the community needs that your project will address.

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How did your project team identify these needs?

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How were members of the benefiting community involved in finding solutions?

--

How were community members involved in planning the project?

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HUMANITARIAN PROJECTS – PROJECT IMPLEMENTATION

Summarize each step of your project's implementation.

Do not include steps related to fundraising, applying, or reporting. (Add rows as needed.)

#	Activity	Duration

Will you work in coordination with any related initiatives in the community? If yes, briefly describe the other initiatives and how they relate to this project. If no, please explain. Are local initiatives not addressing these needs? Or, if they are, why did you decide not to work with them?

There can be value in working with other groups including governments, nonprofit organizations, and private companies.

Please describe the training, community outreach, or educational programs this project will include.

How were these needs identified?

What incentives (for example, monetary compensation, awards, certification, or publicity), will you use, if any, to encourage community members to participate in the project?

List any community members or community groups that will oversee the continuation of the project after grant-funded activities conclude.

These may or may not be Rotary members or clubs.

VOCATIONAL TRAINING TEAMS – PROJECT IMPLEMENTATION

Describe the training needs that the team will address.

How did your team identify these needs?

Describe the specific objectives of the training, including what you expect training participants to gain from the team's expertise.

How were members of the local community involved in planning the training?

Will you work in coordination with any related initiatives in the community? If yes, briefly describe the other initiatives and how they relate to this project. If no, please explain. Are local initiatives not addressing these needs? Or, if they are, why did you decide not to work with them?

There can be value in working with other groups including governments, nonprofit organizations, and private companies.

What incentives (for example, monetary compensation, awards, certification, or promotion) will you use, if any, to encourage community members to participate in the training?

How will training recipients be supported after the training to keep the skills they acquire up-to-date?

List any community members or community groups that will oversee further training after the project ends.

These may or may not be Rotary members or clubs.

SCHOLARSHIP (SEE BELOW FOR SCHOLAR PROFILE QUESTIONS)**

Describe the process your team used to select this candidate.

How do this candidate's background, studies, and future plans qualify them for a global grant under this area of focus?

BUDGET

Will you purchase budget items from local vendors? Explain the process you used to select vendors.

Did you use competitive bidding to select vendors? If no, please explain.

Please provide an operating and maintenance plan for the equipment or materials you purchased for this project. This plan should include who will operate and maintain the equipment and how they will be trained.

Describe how community members will maintain the equipment after grant-funded activities conclude. Will replacement parts be available?

If the grant will be used to purchase any equipment, will the equipment be culturally appropriate and conform to the community's technology standards? If yes, please explain. If no, describe how the project team will help community members adopt the technology.

After the project is completed, who will own the items purchased by grant funds? No items may be owned by a Rotary district, club, or member.

FUNDING

Have you found a local funding source to sustain project outcomes for the long term? If yes, please describe this funding source.

Will any part of the project generate income for ongoing project funding? If yes, please explain.

Is your economic and community development activity a microcredit project? If yes, upload your [microcredit supplement](#) file.

****SCHOLAR APPLICANTS WILL ANSWER THE FOLLOWING QUESTIONS:**

List the two educational institutions you have most recently attended:

Provide the following information about the academic program you plan to attend:

Matriculating educational institution (including city and country):

Language of instruction:

Website:

Academic program:

Academic program start date:

Academic program end date:

List the classes you plan to take and provide any relevant links to information about the program.

How does your educational, professional, or volunteer experience align with Rotary's goals in the selected area of focus?

What are your plans immediately after the scholarship period?

How do your long-term professional goals align with Rotary's goals in the selected area of focus?