

Rotary Club of Edmonton

**World Community Service
Committee**

**PROJECT SELECTION
CRITERIA**

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Rotary International Goals

Rotary International's goal is that effective service projects should be of an enduring nature and:

- Improve the quality of life of those in need through international Rotary service.
- Encourage cooperation between clubs and districts of different countries in efforts to carry out international service projects.
- Provide an effective framework for the exchange of information on project needs and offers of assistance.
- Increase awareness among Rotarians on international development and cultural issues, and the importance of implementing projects which help people to help themselves.
- Provide World Community Service project services to participants in related Rotary Foundation programs and emphases.
- Educate Rotarians about funding opportunities for their World Community Service projects through The Rotary Foundation and other sources.
- Communicate successful World Community Service experiences to other Rotarians.
- Foster international understanding, goodwill, and peace.

Rotary International Criteria For World Community Services Projects

Rotary International lists three criteria for a World Community Service project to which the Rotary Club of Edmonton subscribes:

1. The project is humanitarian in nature.
2. Rotarians in two or more countries are involved.
3. One of the countries contains the site of the project.

Rotary Club of Edmonton Objectives

Funding Criteria

Project and fund allocation criteria for the Rotary Club of Edmonton's World Community Service Committee are that the goals and criteria of Rotary International are met. Additionally, projects are to be funded in one of the following three primary categories:

1. Projects that require minimal funds from the Rotary Club of Edmonton where those funds can be leveraged with funds of other Rotary Clubs, with funds from The Rotary Foundation, and with funds from other partners, where the combined assets can be used to finance large projects that will leave a lasting legacy.
2. Projects funded solely by the Rotary Club of Edmonton that are tied directly to a participating Rotary Club at the location of the project.
3. Long-term projects, including both funding and member participation on site, that make a broad commitment to a specific community.

Types of Projects to Fund

The World Service Committee is allotted an annual budget from the Rotary Club of Edmonton. The Committee will may decide to fund one, or several, projects in a given year. The following are examples of the types of projects which may be considered, but are not limited to only these ideas.

- a) Projects that meet the objectives of the Rotary Club of Edmonton, and where Partners are involved, to also meet Partner Objectives.
- b) Projects that that will have long lasting and sustainable benefits for the community or group/organization being funded.
- c) Projects must have good checks and balances to ensure accountability for the money. An example would be to help a community start a business venture that will help them become permanently self sufficient.
- d) A single large project, or a series of smaller projects in a given year.
- e) Projects designed to align with the annual objectives of the Rotary Club of Edmonton or of Rotary International, which can and will change yearly.
- f) Projects designed to target geographic areas or types of activities. For example, projects involving other Rotary Clubs (or service clubs) working in the same area may ensure a better chance of success.

Funding Influences

Factors influencing the decisions of the World Community Service Committee, with respect to project and fund allocation selection, will include but not be limited to the following criteria:

- Need
- Anticipated Benefit
- Sustainability
- Reporting and Accountability
- Funding and Support
- Recognition
- Conflict of Interest

Committee Accountability

Committee members are accountable to the membership of the Rotary Club of Edmonton for the funding decisions it makes. To ensure the best possible success, all project and funding applications should therefore be subjected to the same vigorous scrutiny so as to eliminate any questions as to the project and funding application's validity.

1 Need

- a) What is the need?
- b) Is this a real need that can be validated?
- c) How is the need validated? By whom? Preference could be given to a need that can be verified by one of our Club members personally or through a personal contact in the region of the project.
- d) Why is this needed? Can we address root causes to reduce or eliminate problems rather than provide ongoing support?

2 Anticipated Benefit

- a) What is the anticipated benefit?
- b) Who will benefit?
- c) How many will benefit? Does this benefit a few individuals or an entire community?
- d) Is the benefit limited to those whom the project is targeted directly, or will it also result in benefit to other associated individuals or communities?
- e) How will the benefit be demonstrated? What will be different and better?

3 Sustainability

- a) Can this project become self-sustaining or will on-going funding be required?
- b) Does the project include a plan to involve the local community or organization in taking over operations (training on how to operate equipment, hygiene related to operating a well, etc.)?

4 Reporting and Accountability

- a) How will financial records be maintained and reported?
- b) Are those involved in the funding request reliable in of their history of spending money of and reporting back to donors?
- c) Are there good local contacts at the location of the project and also in Canada to ensure accountability and reporting?
- d) How will benefits be reported?
- e) Is there a champion both on site and in our Rotary Club or in Canada to continue to push for the projects success?

5 Funding and Support

- a) Is there local funding or donations in kind support (land, equipment, experience)?
- b) Are individuals benefiting from the project committed enough to contribute personal energy and/or money to the project?
- c) Are there individuals willing to seek funding support from additional sources?
- d) Is financial support available from other organizations?
- e) Are other Rotary Clubs willing to partner on the project? Are there other partnerships that could be leveraged?
- f) Can the Rotary Club of Edmonton's donation be leveraged through matching grants, local contributions, or other project partners?
- g) Is a specific amount requested or is the specific funding requirement unknown?
- h) How many years is funding required?
- i) What security is in place to ensure funding goes to the right place?
- j) Is communication (translation) support available if needed?
- k) Is project staffed by volunteers or paid employees?

6 Recognition

- a) Will Rotary be recognized?
- b) How?

7 Conflicts of Interest

- a) Does the project benefit a Club member or a personal friend or relative?
- b) Does funding benefiting anyone's business?

Project Information – Short Form Reporting

Project Information

1. Project title.
2. Project location – including country, province or state.
3. Describe the project, its objectives and how they will be obtained.
4. (Estimated start time / estimated completion date). Estimated time to complete project

Community Involvement and Project Planning

5. A brief description of the community where the project is to be located. (include a map, if possible, showing the location)
6. Explain why there is a need for this project, who the beneficiaries are and the present situation in the project locale.
7. Target population – Who are they?

Government Involvement

8. Is government approval or endorsement required for the project? If yes, has this been obtained?

Rotary Club Involvement

9. Primary contact (Rotarian) -- name and address, phone, fax, email.
10. Are other organizations involved in this project? If so, how will Rotarians interact with the organization in this project?
11. Rotary International requires financial commitments from all Rotary partners involved in a project. What is the amount of contribution from your club?
12. Please send a letter from your club President stating support and commitment for the project.

Project Budget

13. Include a complete itemized budget for the entire project. We ask for a complete budget on long form, a preliminary budget might do at this stage.

Implementation

14. When will the project become self-supporting and how will it continue once the Rotary funding from overseas is over?
15. Purchase of equipment – who will own and maintain the equipment.

Appendix 1 – Humanitarian Grants

Rotary International's eligibility guidelines:

Eligible Grants	Ineligible Grants
Revolving loans / microcredit	Establishment of a foundation, permanent trust, or long-term interest-bearing account
Construction of infrastructure such as service roads, wells, reservoirs, dams, bridges, latrines, toilet blocks, water supplies, and other similar structures	Construction or renovation of any structure in which individuals live, work, or engage in any gainful activity. This includes buildings, containers, mobile homes, or structures where individuals carry out any type of activity such as manufacturing, processing, maintenance, or storage, including provision of new services or upgrade of facilities
Purchase of equipment or appliances	Provision of plumbing or electrification inside buildings
Short-term and/or contracted labour for project implementation	Salaries of individuals working for another organization
Administrative expenses for project activities	Operating or administrative expenses of another organization
Primary and secondary education, tuition, transportation	Postsecondary education activities, research, or personal or professional development
Domestic travel	International travel (except Volunteer Service and 3-H Grants)
Detailed, itemized expenses	Contingencies, miscellaneous expenses
Assistance to land mine victims	Land mine removal
Publicity expenses such as newspaper fees, or printing of posters, brochures, or fliers to inform the community of an available service	Rotary signage
Vaccines and immunizations, if the project is consistent with the criteria, procedures, and policies of the PolioPlus program and World Health Organization	Transportation of vaccines or immunizations by hand over national borders
New Rotary-sponsored projects not already in progress or completed	Projects already undertaken and in progress, existing projects, activities primarily sponsored by a non-Rotary organization, or projects already completed
Maternal and prenatal health and education	Purchase and distribution of birth control devices and ultrasound equipment for use in sex determination
Budgeted and itemized humanitarian goods	Unspecified or cash donations to beneficiaries or cooperating organizations
Humanitarian or service activities benefiting a community in need	Fundraising activities, expenses related to Rotary events such as district conferences or anniversary celebrations or entertainment activities that do not include a humanitarian aspect
Secular non-religious activities that benefit a community in need	Projects that support purely religious functions at churches and other places of worship

Appendix 2 – District Grants

Appropriate Grant Implementation:

1 The use of funds from the Rotary Foundation must:

- a) Promote active and personal participation of all Rotarians involved in the implementation of the grant;
- b) Assist in the development of stronger Rotary networks as Rotarians implement projects that have been initiated by a Rotary Club. Projects which receive Rotary Foundation support should satisfy the real humanitarian needs of the receiving community;
- c) Not involve the establishment of a permanent foundation, trust, or permanent interest-bearing account. Grant projects can involve the establishment of a revolving loan fund, but must include training and detailed information regarding recipient payback schedules;
- d) Not directly benefit a Rotarian, an employee of a club, district or other Rotary entity, or of Rotary International, or a spouse, lineal descendant (child or grandchild by blood or legally adopted child), a spouse of a lineal descendant, or an ancestor (parent or grandparent by blood) of any living Rotarian or Rotary employee;
- e) Not duplicate any existing Rotary Foundation or other Rotary-sponsored program;
- f) Exclude any liability to The Rotary Foundation or to Rotary International except for the amount of the grant;
- g) Be consistent with the criteria, procedures, and policies of the Polio Plus program and the World Health Organization for projects involving vaccines and immunizations;
- h) Not be used to reimburse clubs/districts for projects already undertaken and in progress, an existing project, activities primarily sponsored by a non-Rotary organization, or for projects that are already completed.

2 Grant funds cannot be used:

- a) For the purchase of land and buildings. If the grant depends upon the construction of a building, the construction must be funded by club/district funds or funded by a cooperating organization. The Rotary Foundation will not release grant funds until such construction is completed;
- b) For construction of any structure in which individuals live, work, or engage in any gainful activity such as buildings, containers, and mobile homes or structures where individuals carry out any type of activity including manufacturing, processing, maintenance and/or storage. Construction of infrastructure such as service roads, wells, reservoirs, dams, bridges, latrines, toilet blocks, and water supplies and other similar structures is acceptable;

- c) For renovation of structures, including the provision of new services or upgrade of utilities (i.e. electrical & plumbing), in which individuals live, work, or engage in any gainful activity such as buildings, containers, and mobile homes or structures where individuals carry out any type of activity including manufacturing, processing, maintenance, and/or storage; ineligible expenditures include, but are not limited to:

3 Unacceptable Construction & Renovation

- a) Electrification
- b) Windows/Doors
- c) Walls/Roof
- d) General Refurbishment (carpet, paint, soundproofing)
- e) Heating/Air-conditioning
- f) Repairs of Utilities
- g) Plumbing
- h) Demolition
- i) Miscellaneous
- j) For salaries, stipends or honorariums for an individual or individuals working for a cooperating organization or beneficiary;
- k) To support the operating or administrative expenses of any organization;
- l) For post-secondary education activities, research, or personal or professional development;
- m) For excessive support of any one beneficiary, cooperating organization, or project;
- n) For international travel expenses of any kind;
- o) For fundraising activities;
- p) For unspecified or cash donations to beneficiaries, except through revolving loan projects. Grant funds should be used to purchase budgeted and itemized humanitarian goods;
- q) For expenses related to Rotary events such as district conferences or anniversary celebrations;
- r) For entertainment activities that do not include a humanitarian aspect;
- s) As donations to cooperating or benefiting organizations;
- t) To support purely religious functions at churches and other places of worship.