CONNECTING THE WORLD TO HEAL MORE LITTLE HEARTS
RESPONSIBILITIES OF HOST AND INTERNATIONAL PARTNERS & COOPERATING ORGANIZATIONS

2020-2021

GUIDELINES FOR ROTARY GLOBAL GRANT PARTNERS

PLEASE REVIEW AND CONFIRM YOUR COMMITMENT
This document is designed to help partners understand responsibilities and work together through the Rotary Global Grant process for a successful outcome.
STEP ONE

BECOMING A ROTARY GLOBAL GRANT PARTNER WITH GOLI

Form a Project Committee (Host and International Partners)

A. For Club Sponsored Projects
   i. Appoint 3 Club members to be Project Contacts
      1. These contacts should be detail-oriented, have efficient follow-up skills and have time to dedicate to the project and its responsibilities
   ii. Decide which of the 3 will be the Primary Contact. This is the person who will have the most contact with The Rotary Foundation, the International Partner and GOLI
   iii. Please confirm that all project contacts and the Club President all have active accounts on www.myrotary.org
   iv. Please confirm that the current Club President and all project contacts are registered and their positions are updated with Rotary International
   v. Send GOLI names and email addresses of 3 Project Contacts indicating who will be Primary Contact
   vi. Send GOLI name of Rotary Club and District number

B. For District Sponsored Projects (Host and International Partners)
   i. Appoint 3 Rotarians from your District to be Project Contacts (Please see criteria listed above)
   ii. Decide which of the 3 will be the Primary Contact. This is the person who will have the most contact with The Rotary Foundation, the International Partner and GOLI
   iii. Please confirm that all project contacts have active accounts on www.myrotary.org
   iv. Please confirm that all project contacts are registered and their positions are updated with Rotary International
v. Send GOLI names, email addresses and which Rotary Club they are a member of for 3 Project Contacts indicating who will be Primary Contact

vi. Send GOLI District number

C. Timeline

i. This step should begin a minimum of 4 months prior to the anticipated start date of the project

STEP TWO

CONDUCTING A COMMUNITY NEEDS ASSESSMENT

It is the responsibility of the Host Partner to conduct a Community Needs Assessment and complete the Rotary Form which will be uploaded into the Global Grant Application

i. This form is available in the Grant Center. If you are not able to locate it, Brenda Small will send to you

ii. The Tools to complete a Community Needs Assessment should be reviewed so that you can determine which method(s) you will use to conduct the assessment. These are also available in the Grant Center or can be obtained from Brenda.

iii. It is recommended to involve members of the community, beneficiaries, local healthcare professionals, hospital administrators and/or your cooperating organization to obtain the most accurate and concise information for the Needs Assessment

iv. When completed, send your assessment to Brenda to upload into the grant portal and also to use the information provided to strengthen the grant application.
STEP THREE

THE GRANT PREPARATION PROCESS

A. Coordinate with GOLI to begin writing the grant application
   i. Brenda Small (Assistant to GOLI CEO, Rob Raylman) will work directly with the Primary Contact to draft the grant application and help facilitate the Global Grant process throughout the life of the grant.
   ii. We ask that immediately upon appointment of the grant committee, the two Primary Contacts (Host & International) contact Brenda Small (Rotarian and Assistant to GOLI CEO, Rob Raylman) Brenda.giftoflife@gmail.com so that she can introduce you to and discuss the grant process and provide support and assistance throughout the life of the grant.
   iii. Immediately following this initial contact, Brenda will begin to work with Primary Contacts to complete the following tasks:
       a. Obtain a Rotary Global Grant Number
       b. Draft the grant application and supporting documents
   iv. GOLI will work with partner Rotarians and Cooperating Organizations to finalize the grant budget and Project Objectives
   v. For all VTT global grants, please inform GOLI who has been appointed from your Club or District as Rotarian Team Leader for each VTT Training Visit

B. Complete Grant Application Process
   i. A final draft of the grant application will be distributed to Host and International Rotary Partners and Cooperating Organizations for review and comment
   ii. A final draft of MOU’s will be distributed to Host and International Rotary Partners and Cooperating Organizations for review and comment and ultimately for signatures
iii. GOLI will collect all Rotary VTT Profiles and CV’s from VTT team members and will work with Medical Team Leader to complete Training Plan and VTT Itinerary for all VTT Global Grants and will upload into the grant application

iv. GOLI will request all proforma invoices needed to complete the application. Local Rotarians and Cooperating Organizations may be asked to help with this task.

C. Complete Grant Funding

i. GOLI will work together with partner Rotarians and Cooperating Organizations to complete funding to satisfy grant budget

ii. Host and International Rotary Partners are not required to, but are encouraged to, contribute to grant funding

iii. Host and International Rotary Partners are encouraged to help complete grant funding by raising awareness of the project throughout Clubs in their District and other Districts as well as from individuals and organizations. They are also encouraged to request DDF funds from their District to support the grant.

iv. Please note, at least 30% of grant funding must come from outside the project country

D. Finalizing, Authorizing and Submitting the Grant Application

i. Host and International Rotarians are responsible for helping to obtain MOU signatures in a timely manner and returning signed, scanned copies to Brenda to upload into the grant application. ***Please note – only the Rotary MOU is accepted by The Rotary Foundation. Other formats are not accepted.

ii. Host and International Rotarians and Cooperating Organizations are responsible for helping to obtain proforma invoices to support the grant budget. These proforma invoices are uploaded into the grant application.
iii. Upon completion of the grant application and upload of all supporting documents, the grant will be locked and moved to Authorizations Mode

iv. Once in Authorizations Mode, Host and International Rotarians are responsible for obtaining all authorizations from their Club and District representatives as well as any authorizations needed for contributions they solicited. GOLI will take care of authorizations for all funds solicited by GOLI

v. After all authorizations are complete, the grant will automatically be submitted.

vi. Once the grant is submitted, changes are no longer possible to funding.

STEP FOUR

THE REVIEW PROCESS

A. The normal timeframe for review and approval of a Global Grant by The Rotary Foundation is 4 – 6 weeks. For Humanitarian grants, it will be on the lower end of the spectrum and for VTT grants on the higher end. This timeframe can vary depending on the current work load of the assigned Grants Coordinator and the strength and completeness of the application.

B. During the review process, the Host and International Rotary Partners will receive communication/questions/requests for additional information from the assigned Grants Coordinator and possibly the cadre member who also reviews the application if requested World Fund match is $50,001 - $200,000, or if total funding is $100,002 - $400,000

C. Host and International Partners are responsible for forwarding all correspondence received in relation to the Global Grant to GOLI
(Brenda Small and Rob Raylman) so that we may assist you in responding in a timely manner and keep the grant moving efficiently

D. Host and International Rotary Partners are responsible for providing timely responses to The Rotary Foundation during the review process. This communication should NOT come from a cooperating organization

STEP FIVE

WHAT TO DO UPON APPROVAL

A. Draft and Submit Spending Plan/Payment Contingencies
   i. Brenda will draft a formal Spending Plan based on the approved budget and will submit to partner Rotarians for approval and submittal to TRF
   ii. Brenda will work with host and international Rotarians to advise how to satisfy any Payment Contingencies from TRF

B. Establish Global Grant Bank Account
   i. Each Rotary Club or District who has been appointed to manage grant funds is required to open a DEDICATED Global Grant Bank Account
   ii. Club Sponsored projects should have accounts opened by the sponsoring Rotary Club and District sponsored projects should have accounts opened by the sponsoring District
iii. Please note, no other funds/expenses can be co-mingled with this account.

iv. In the case where project funds will be spent both in the project country and outside the project country, a split payment will be requested and a Global Grant bank account will be established in each country.

v. You will be required to appoint two signatories on the bank account from your Rotary Club for Club Sponsored projects and from your District for District Sponsored projects.

vi. All banking information and names of signatories must be uploaded into the grant portal. Please contact Brenda Small or your TRF Payments Coordinator if you need assistance in completing this task.

**C. Collect Grant Commitments and Request Release of Funding**

i. Immediately upon approval, notify all grant contributors that the grant has been approved and their commitment is now due (***GOLI will notify all contributors they solicited**).

ii. Determine which contributions will be sent directly to the Global Grant Bank Account and which will be sent directly to The Rotary Foundation.

iii. ***Please note – all contributions sent directly to The Rotary Foundation MUST include an additional mandatory 5% admin fee. These contributions are eligible for Paul Harris credit.

iv. ***Please note – all contributions sent directly to the Global Grant Bank Account do NOT incur any additional fees. These contributions are not eligible for Paul Harris credit.

v. Report to TRF Payments Coordinator which contributions are expected to be sent to TRF and which are expected to be deposited directly into the GG account.

vi. When all contributions being sent to the GG Bank Account have been deposited, you must request a statement from your bank showing all deposits. This statement must be detailed.
indicating which contributions are included with each deposit. Brenda can help with this if needed. Once the statement is detailed, it must be submitted to the Payments Coordinator.

vii. Upon submission of the detailed bank statement, request the payments coordinator to confirm that all funding is now complete.

viii. Once funding is complete, Rotarians need to request release of funding to GG bank accounts. If being paid in installments, request release of first installment (minus amount deposited into GG account) per approved Spending Plan.

STEP SIX

PROJECT IMPLEMENTATION AND MANAGEMENT

A. Rotarian Monthly Responsibilities
a. Send copy of bank statement and all supporting invoices to Rotary Partner Primary Contact and to Brenda Small. (Brenda will record deposits and withdrawals for both GG accounts and help to manage overall grant funding according to budget and spending plan)
b. Create an Excel spreadsheet where all invoices, checks and payments are recorded together with a description of what each payment was for
c. If possible, set up a Google Drive where all the above documents are uploaded and shared with Rotary partner and Brenda Small
d. If QuickBooks is a preferred method of recording keeping, please send the monthly reconciliation to Brenda Small

B. Rotarian Management of Grant Funds
a. Rotarians are responsible for review and approval of budgeted grant expenses upon presentation of invoices
b. Rotarians are responsible for prompt payment of invoices following approval
c. All invoices should be paid in a timely manner, whether by check or wire transfer
d. Rotarians are responsible for assigning one of the Secondary Project contacts with the above responsibility should the Primary Contact be unavailable for an extended period of time
e. Rotarians are responsible for keeping copies of all invoices, bank statements and payments for the life of the Global Grant

C. Rotarian VTT Mission Prep Responsibilities – for Host Rotarians unless otherwise indicated (VTT Grants Only)
a. Submit VTT documents for team approval (Host or International). Brenda will send these to you to submit.
b. Rotarians should NOT contact VTT team members directly – all communication to be through Medical Team Leader, Trip Coordinator or GOLI
c. If requested, place orders with local vendors and ensure delivery prior to start of mission
d. Confirm Hotel Reservations for team members
e. Coordinate airport pick up and drop off and daily In-country Transportation for VTT team and visiting Rotarians
f. Coordinate Meals for VTT team and visiting Rotarians – Breakfast should be included in hotel rate, Lunch to be catered at hospital for day shift, Dinner arrangements for night shift. Be sure any food allergies are noted and adequately addressed.

g. Arrange break/meeting room with hospital for use during mission

h. Arrange for snacks, water, coffee, etc to be replenished daily in snack room for VTT and local team

i. Arrange for cell phones for VTT team (one to be at hospital and one to be with team leader)

j. Arrange for Wi-fi for team at hospital if possible

k. Distribute mission responsibilities in advance of team arrival and advise contact info and duties to GOLI and VTT Team Leader. This includes appointing one person to be in charge of all mission photos – please see guidelines below.

l. Coordinate Welcome and/or Thank you lunch or dinner for VTT team and visiting Rotarians

m. Facilitate Customs Clearance of all supplies, medications, equipment either shipped or brought in team luggage and arrange for all medical supplies (new and inventoried to be brought to hospital prior to start of mission). In some cases, this will be completed in cooperation with the local NGO.

n. Contact local media to arrange for press conference during VTT mission. Advise all prominent participants of date and time.

o. Design and print banners to display at hospital thanking all sponsors

p. Prepare name tags for VTT team

q. Provide GOLI with list of document requirements to obtain team approval from local authorities to conduct medical mission (2 – 3 months in advance of mission dates)

r. Facilitate document submittal and approval of each team member from local authorities a minimum of 2 weeks prior to team arrival (in some countries the local NGO will take care of this)
s. Prepare copies of photo consent forms in local language – must be signed by each parent or guardian and kept on file (GOLI can provide template if needed) **This is a Rotary Requirement.

t. Draft brochure to distribute to VTT team members which includes the following information:
   i. Daily schedule
   ii. Local Contact names and numbers
   iii. Hotel info
   iv. Driver Contact info
   v. Hospital name and address
   vi. Suggested restaurants
   vii. Taxi/Uber info – safest transportation
   viii. Places of interest on their day off
   ix. Any other important information

u. Optional – assemble small gift for each child operated. Should raise awareness of Rotary. Could include a small toy, t-shirt, toiletries, school supplies, brochure about Rotary, Polaroid photo of child with Rotarians and/or VTT team members upon discharge, etc.

v. Optional – arrange for beneficiaries from previous mission to assemble for a small party at the hospital so that Rotarians and VTT team members can see how well they are doing.

**D. Rotarian Responsibilities During a Mission Trip**

   a. Provide hospitality to VTT team members and visiting Rotarians (Host)

   b. Photos – appoint one capable person to be at the hospital each day to take photos to document the mission, all participants, all beneficiaries, etc. Please carefully review photo guidelines below and contact Brenda Small with any questions. All photos should be shared with GOLI to create a report to all project donors. (Host or International Rotarian Team Leader).
See examples of mission reports here: https://www.giftoflifeinternational.org/reports/

c. Provide support to children treated and their families (Host / International Rotarian Team Leader)

d. Appoint 1 – 2 people to be available to respond to any non-medical logistical needs for the VTT team (Host)

e. Appoint 1 – 3 representatives to attend the Debrief meeting at the end of the mission. This will provide you with important information on the progress of the project including accomplishments and challenges to be addressed. This information will help Rotarian Team Leaders to complete VTT report for Progress and Final Reports (Host/International Rotarian Team Leader) Please share this information with Brenda Small to help with completion of Progress and Final Reports.

f. Raise awareness of Rotary and Gift of Life – wear Branded apparel, display sponsor banners, provide beneficiaries with a small Rotary gift, talk to parents of beneficiaries about Rotary and the Gift of Life Program (Host/International Rotarian Team Leader)

E. Rotarian Responsibilities Following a Mission Trip (Host)

a. Complete payments of all invoices relating to the VTT mission

b. Collect all invoices relating to the VTT mission, record on financial spreadsheet and submit to Brenda Small or upload into Shared Google Drive

c. Work with hospital to ensure all children receive adequate follow up care

d. Transport medical inventory to storage facility/area (if applicable)

e. Provide assistance / sponsorship to any children/families who require nutritional assistance (if program in place)

f. Optional – arrange for small party for beneficiaries at a Rotary meeting or social event (Take photos and send to GOLI)

g. Begin preparations for next mission (if scheduled)
COLLECTING DATA FOR MONITORING AND EVALUATION

**1 – 2 specific individuals should be assigned these tasks. They should be available to be at the hospital each day of the VTT mission trip, should have some experience taking photos, easily interact with the children, their families and team members.

***IMPORTANT – If your grant is Humanitarian (Not VTT) please assign local Rotarians to be in charge of Monitoring and Evaluation throughout the life of the grant. These appointed Rotarians should submit all patient data, profiles and photos as listed below to both their International Rotary Partner and to Brenda Small at GOLI on a monthly basis for reporting purposes.

A. Patient Data
   a. Collect patient lists from Surgeon for surgeries and Interventional Cardiologist for Catheterizations (This may change daily)
   b. Keep track of children treated each day
   c. Record patient name, age, diagnosis, type of procedure (surgery or cath) and date of procedure

B. Socio-economic profile
   a. Complete Socio-economic profile for each family of children treated to assess if additional assistance is needed (template can be provided by Brenda Small)

C. Photos Required - ***Obtain signed photo release forms
   a. Before and After photo of each child treated. All photos to be labeled with child’s name and indicate before or after photo – see guidelines below
   b. Photo of each child treated with parent or guardian (if possible)
c. Team photo of local team
d. Team photo of visiting team (For VTT grant only)
e. Local and Visiting team together (For VTT grant only)
f. VTT and Local team members at work in ICU, OR and Cath Lab
g. Rotarians at work – group photos, photos with children, photos during prep or helping team (some posed and others not posed)
h. Cooperating Organizations, donors, special guests, etc

STEP EIGHT

REPORTING

A. Mission Reports
   a. A mission report will be generated by GOLI following each VTT mission trip based on information provided
   b. Please share all mission photos – please label photos
   c. Please advise of any special recognition needed in report
   d. Upon completion and approval, digital mission reports will be distributed to all donors, partners, team members, hospital
   e. For all Humanitarian grants, a photo report will be generated showing children treated, the local team and host Rotarians. Brenda Small will assemble this report based on photos received.

B. Progress Report
   a. A Rotary Progress Report is due to The Rotary Foundation within 12 months of receiving the first grant payment. In most cases this will occur sooner and will be generated when most of the first installment payment has been spent.
   b. Brenda Small will advise when Progress Report needs to be generated based on oversight of Global Grant
c. Rotarians are responsible for submitting any bank statements, invoices, proofs of payment, financial spreadsheets not already submitted to Brenda Small

**C. Final Report**

a. A Rotary Final Report is due within two months of project completion.

b. Rotarians are responsible for submitting any bank statements, invoices, proofs of payment, financial spreadsheets not already submitted to Brenda Small

c. Rotarians managing grant funds are responsible for submitting a final bank statement showing all funds spent to Brenda Small

**PHOTO GUIDELINES**

**PLEASE REVIEW CAREFULLY**

**A signed photo consent form is required from each parent or guardian of a child photographed.**

**Please check your photos after you take them to be sure they are clear and fall under the “Acceptable” photo guidelines. If not, please retake them.**

**Examples of Acceptable photos**

*Bright, clear, focused, happy, tell a story, children do not have tubes, show children wearing GOLI t-shirts or Rotary t-shirts, holding GOLI or Rotary teddy bears, if not clothed...children should have blanket covering them*
Examples of Acceptable photos
Both posed and “at work” photos of local, visiting team members and Rotarians. Group photos of children are also great.
Photos showing training, team work, happy families. All tasteful photos which tell a story.

Examples of **UNACCEPTABLE** photos

- Too dark, Too Blurry, Child looking away,
- **Label photo file instead of having child hold name**
Photos should be taken with children wearing a hospital gown, t-shirt or blanket.... especially females.

Window in background makes subject too dark. Chose background carefully.

Best to wait to take “after” photo in a few days when tubes are removed and child is more comfortable.
**PLEASE NOTE:**

- Photos should be taken with a camera or good quality cell phone...no tablets please.
- Do not take photos through windows unless absolutely necessary
- Do not be afraid to get close to the children and interact with them. If they are comfortable with you the photos will be much better
- Request permission to take photos in O.R, Cath Lab and ICU. If not possible, please ask team members to take some photos and share. Normally this should not be a problem.
- Take some photos vertical and others horizontal.
- Take some photos posed and others non-posed or action photos.
- Do not reduce file size when sharing or uploading photos.
- Keep track of photos taken daily and check quality so that you can fill in where needed before the end of the mission week or before children are discharged.
- Upload or send photos to Brenda Small daily for mission report.

No specific purpose...does not show Rotarians in Action. Should be interacting with a beneficiary or team member...not just in the break room.
Rotary Grant Support

Maximizing our global impact through our partnership with The Rotary Foundation.

An impressive $10,481,251 million in Rotary Grants since 2013 have supported our efforts.

Gift of Life is a Rotarian-based nonprofit organization encompassing 84 Gift of Life programs in 86 countries across 5 continents.

Gift of Life initiatives are supported by 286 Rotary Clubs and 63 Rotary Districts throughout the world.

Maximizing our global impact thanks to our partnership with The Rotary Foundation.
Rotary Global Grants are a major funding source for Gift of Life International and our affiliated programs.

Through this partnership with The Rotary Foundation and its global network, we are able to maximize our impact in providing care to children with heart disease around the world.
GIFT OF LIFE INTERNATIONAL CONTACTS

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