



Rotary

TERMS AND CONDITIONS FOR ROTARY PROGRAMS OF SCALE GRANTS

I. PROGRAMS OF SCALE GRANTS

The Rotary Foundation's Programs of Scale initiative is a highly competitive grant program designed to invest in sustainable, evidence-based interventions that address a community-identified need across a significant geographic area and population. Funded grants support activities over three to five years, align with one or more of Rotary's areas of focus, include measurable outcomes, and demonstrate impact.

The Rotary Foundation will award one grant each year in a competitive, two-step proposal-to-application process. Incomplete proposals and applications will not be considered. Proposals will be due no later than 1 March. The programs of scale grants review committee, comprising staff, Rotarians, and external subject matter experts, will select a limited number of proposals to advance to the application phase. Successful applicants will be notified by 15 April and full applications will be due by 30 June. Applications will then be reviewed by the programs of scale grants review committee and the programs committee of the Board of Trustees; final approval will be made by the full Board of Trustees.

Action	Deadline
Phase 1	
Call for proposals	1 January
Proposals due	1 March
Notification of selected proposals	15 April
Phase 2	
Applications due	30 June
Awardees receive notification	1 November
Post-approval Phase 3	
Grant payment	
Program implementation	
Reporting	

II. ELIGIBILITY CRITERIA

Funded programs must:

- Be led by a Rotary entity (Rotary club, Rotary district), in collaboration with an implementing partner organization (NGO, government entity, or private sector institution). The implementing partner must have experience successfully managing large-scale efforts similar to the proposed program.
- Align directly with one or more [areas of focus](#), as defined in the [Areas of Focus Policy Statements](#)
- Propose activities that are scaled up from successfully implemented programs
- Originate from within or in collaboration with the community in which the program will be implemented
- Integrate evidence-based approaches informed by a community assessment that takes into account the benefiting community's needs and assets
- Be informed by baseline data from the community assessment. National and regional data from outside sources may be used as part of the community assessment but is considered supplemental to primary data.
- Demonstrate a program model that can be adapted by other communities with similar needs
- Be of sufficient scale to impact a significant community or population
- Include components that promote behavior change
- Request an award amount of \$2 million
- Include an implementation timeline spanning 3-5 years
- Exhibit sound financial management and stewardship practices
- Include rigorous monitoring and evaluation activities, and budget for a third-party, external evaluation to be conducted at the end of the program
- Demonstrate how long-term outcomes will be sustained
- Demonstrate sensitivity to the beneficiary groups' tradition, culture and language
- Give The Rotary Foundation a license to distribute any Foundation-funded intellectual property to another Foundation-funded grant or to a Rotary entity
- Have a memorandum of understanding that outlines the roles and responsibilities of all implementing partners
- Have a signed Grant Agreement with the Foundation

Rotary sponsors must:

- Be in good standing with Rotary International and The Rotary Foundation and qualified to participate in grants
- Adhere to the Club and District Memoranda of Understanding
- Receive authorization from their district Rotary Foundation committee chair

III. RESTRICTIONS

Programs cannot:

- Unfairly discriminate against any group; promote a particular political or religious viewpoint; support purely religious functions; support activities that involve abortion or that are undertaken solely for sex determination; fund the purchase of arms or ammunition; or serve as a new contribution to the Foundation or another Rotary Foundation grant
- Propose new or untested programs
- Allocate the grant award or any portion of it to an implementing partner for whom this would be their primary source of funding
- Fund overhead or administrative costs not directly related to the project

- Disproportionately fund overhead and administrative costs of other organizations, even if related to the project
- Consist predominantly of construction or equipment
- Consist solely of research
- Fund scholarships
- Exacerbate social inequalities, political unrest, or environmental degradation

IV. ADDITIONAL GUIDANCE

To be competitive, programs should:

- Source materials, technology, and labor locally
- Have one or more project managers based in the community or region for the duration of the program
- Include reasonable and proportionate project management costs (Potential project management costs include: salary for project manager, related transportation, communication costs, related technology)
- Include reasonable and proportionate project overhead costs (Potential overhead and administrative costs include: rent, bank fees, utilities, information technology, accounting activities)
- Budget at least 10 percent of total funding for monitoring and evaluation
- Have the support and endorsement of local government entities
- Be integrated into or supported by existing regional and or national systems
- Include a completed environmental impact analysis and plan to mitigate environmental impact
- Promote gender equity and inclusion of vulnerable or marginalized populations
- Include external matching or leveraged funding. At this time, Rotary District Designated Fund contributions cannot be allocated to programs of scale grants.

V. PAYMENTS

- Project bank account information will be requested after approval of the grant.
- Grants will be paid out at the Rotary International exchange rate at the time of payment.
- Expenses incurred prior to grant approval cannot be reimbursed with grant funds.
- If grants are not paid within six months of approval, they will be cancelled.
- If grant activities are not initiated within six months of payment, the grant will be canceled, and the sponsors will be required to return the funds.
- Grant payments will be made in installments based on an agreed upon spending plan.
- The first installment will not exceed \$1 million.
- The Rotary sponsor will be the initial recipient of all grant funds, and it will be their responsibility to disburse funds as needed.
- Payments after the first installment will be made after the grant sponsors submit satisfactory interim reports.

VI. REPORTING REQUIREMENTS AND DOCUMENTATION

- Grant sponsors will be required to submit quarterly narrative reports (inclusive of indicators) and semi-annual financial reports.
- All reports and required supplemental documentation must be submitted in English.
- Financials will be reported in local currency and USD equivalent.
- Annual work plans, detailing projected activities and spending, will accompany every fourth quarterly report.
- Significant variations in the approved implementation plan or budget fluctuations exceeding 10 percent variance per category must be communicated to the Foundation in writing to request approval of the changes.

- Interim site visits to evaluate progress of program implementation will be conducted by a member of The Rotary Foundation Cadre of Technical Advisors approximately every 12-18 months depending on program's timeline.
- The Foundation will coordinate and conduct at least one financial audit of the grant.
- Sponsors are expected to assist with and support the coordination of visits made by Foundation staff and volunteers.
- Sponsors are expected to conduct an internal midterm evaluation and will be required to submit a report to the Foundation detailing its findings.
- Sponsors must budget for an external final evaluation; the terms of reference for the final evaluation will be developed jointly with the Foundation, and the selection of the third-party evaluator is subject to Foundation approval.
- The Foundation will fund and conduct a post-project evaluation 12-18 months after the completion of the program and will share the evaluation report and lessons learned with grant sponsors and other relevant audiences.
- Sponsors will keep systematic records of all expenditures relating to this grant. These records (including bills, invoices, canceled checks, and receipts) will be retained by the sponsors for five years after the post-project evaluation and shall be made available for examination within a reasonable period of time upon notice by the Foundation. The Foundation (including its appointed representatives) may, at its own expense, examine or audit the sponsors' records related to activities supported by this grant.

VII. TRAVEL POLICIES

Anyone traveling in association with a grant should make their own [travel arrangements](#). They can work with [Rotary International Travel Service](#) (RITS) or organize travel on their own. Rotary Foundation grants will cover these budgeted expenses related to international travel:

1. Economy-class ticket(s)
2. Transportation to and from airports and local travel related to implementing the grant
3. The cost of inoculations or immunizations, visas, and entry and exit taxes
4. Normal and reasonable luggage charges
5. Travel insurance

Rotary Foundation grants will not cover:

1. Expenses associated with optional stopovers before or after travel that has been approved
2. Penalties resulting from changes in personal travel arrangements, including optional stopovers
3. Charges for excess baggage and shipping

Grant recipients are responsible for:

1. Making travel arrangements
2. Abiding by Rotary International travel restrictions for a particular country
3. Obtaining travel insurance

Rotary International works with a global security advisory firm to maintain a [travel ban list](#) of extremely dangerous countries. The Foundation does not fund travel to these countries because of safety concerns. If a country is added to the list while funded travelers are in that country, plans will be made for their immediate evacuation. Should the person not defer travel to or evacuate from a country as instructed, the Foundation will cancel the grant and request the return of any funds already issued. The Foundation cannot fund any grant whose success relies on international travel to a country on the list, even if the cost of travel is not part of the project budget.