



PROJECT ALLOCATION COMMITTEE 2017-18 GRANT APPLICATION

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A key component of being a Rotarian is the commitment to “Service Above Self” by donating to the Club and Rotary Foundations, and, as importantly, being actively involved in projects to help our local community, and world causes. Our Club therefore encourages its Members to lead and participate in projects that best carry out the Rotary mission. Through the generous donations of our Members, each year the Club makes available grant money to fund projects.

Our Club Bylaws established the Project Allocation Committee (PAC) to solicit, organize and evaluate applications for grants and make advisory recommendations to the Club Board each year, who in turn will make recommendations to the San Diego Rotary Club Foundation.

Applications may be downloaded from the Club website on this page:
<http://www.sandiegorotary.club/about-us/member-information/> To be considered by the PAC for a grant, the completed application must be received by the Rotary Office no later than **March 31, 2017** (preferably earlier). Thereafter, PAC will review and score completed applications and make recommendations to the Club Executive Committee and Board. The Club Board will review the PAC Recommendations and determine their recommendations, which in turn, will be reviewed by the Foundation Board. Approved grants will be available the next fiscal year on July 1, 2017.

Each Application will be reviewed by at least two PAC Members. The Scoring Model involves weighted scoring including:

- Participation of our Club members, including the number of members and their expected time commitment;
- Fulfillment of Rotary mission
- Project’s Action Plan and associated metrics, including achievability of the project’s goals;
- Achievability/Soundness of Goals and Action Plan;
- If funded in the past, actual results against stated goals.

In 2008, the Club Board approved certain guidelines concerning PAC evaluations of applications. Ideally, a project is: a hands-on activity involving Club Members (the more the better) on an on-going basis which fulfills the Rotary Charitable Mission; benefits a specific group or groups of people; meets a specific need or needs not now being met by other resources.

The project should fall within the Rotary Avenues of Service, i.e Community Service, International Service, Youth Service or Vocational Service. If the application is from a recipient of a Club grant the prior year, the application must report the results from the prior year, including the amount spent and accomplishments.

Our Club’s future depends on promoting and sustaining our Member’s altruism and enthusiasm to support and carry out projects that advance the Rotary Charitable Mission. To do so, the first focus must be on empowering and enabling our members’ passions for such projects. As important, emphasis needs to be placed on obtaining not only the “most bang for the charitable buck,” but also the credit and recognition for the good work and generosity that abounds within our Club.



**PROJECT ALLOCATIONS COMMITTEE
2017-18 Regular Grant Cycle**

GRANT APPLICATION

DEADLINE FOR SUBMISSION: MARCH 31, 2017

[email completed Application to mary@rotary33.org or deliver to Rotary Office]

Contact the Rotary office for a Word version of this document. ALTERNATIVELY, YOU MAY ALSO ADD ADDITIONAL PAGES WITH YOUR RESPONSE REFERENCED BY ITEM NUMBER.

Project Name:

Name of Program: (if project is part of a larger program)

Grant Amount Requested: \$

Club Committee:

Contact info for applicant preparing form

Name:

Phone:

Email:

Project Description

1.1 Brief Description of Project:

1.2 Avenue of Service:

____Community ____International ____Youth ____Vocational.

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1.3 Type of Project:

_____Legacy _____Rotary Initiated _____Rotary Supported.¹

2. Advancement of Rotary Mission. (*"To advance local, regional and world understanding, goodwill and peace through the improvement of health, the support of education and the alleviation of poverty"*)

2.1 Project Goals. What would be the definition of "success" for this Project? Specifically, what is/are the overall "Goal(s)"² of this Project or its Program and how specifically will such Goal(s) advance the Rotary Mission?

2.2 Project Action Plan. Briefly described the Project's "**Action Plan**," including Operating Objectives³ which are intended to be executed or accomplished to achieve the Project's Goal(s).

2.3 Measurement & Reporting

2.3.1 How will achievement of Operating Objective and Goals be measured or evaluated?

2.3.2 How and when will such measures and evaluations (along with a brief description of unexpected results and obstacles encountered) be reported to the Club Board?

3. Past Performance. If the Project or its Program received a grant last year, describe:

(a) the degree to which last year's Operational Objectives and Goal(s) were achieved and how such achievement was measured, assessed or evaluated (contact the office if you need a copy of last year's application.)

(b) any unexpected results or obstacles:

¹ A "**Legacy Project**" is any Project which has a long-standing tradition of Rotarian leadership and major Club Member involvement or is promoted by Rotary International. A "**Rotary-Initiated Project**" has significant Club Member involvement, but usually has community or other Rotary Club partners. A "**Rotary-Supported Project**" is a Project primarily operated independent of Club Member involvement but where the Club has been asked for or has volunteered financial support through a Grant.

² A "**Goal**" is an aim or ultimate aspiration that the Project or the Program is intended to achieve over the long term.

³ An "**Operating Objective**" is a tactics or objective to be performed or achieved which is measurable, dated and vital to the accomplishment of one or more of the Project's/Program's specified Goals

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4. Sources and Uses of Project Funding

4.1 Provide a projected Sources & Uses of Proceeds Budget for the Project. "Sources" should include the requested grant funds and any outside funding. "Uses" should identify expenses of \$500 or more by amount and specific payee. Other expenses should be aggregated and identified by category.

4.2 Is any payee or affiliated group of payees expected to receive \$500 or more in the aggregate of Project funding from any source? YES _____ NO _____ If yes, identify and explain.

4.3 Are any funds received or used by the Project or Program restricted or limited in any way that discriminates or would appear to discriminate on the basis of race, national origin, religion, alienage, ethnicity, gender, sexual preference or other discriminatory classification? YES _____ NO _____ If yes, identify and explain.

4.4 If the Project is expected to receive funding from anyone other than this grant, identify each source and the amount expected to be funded.

5. Club Member Involvement. Specifically describe the:

(a) activities that Club Members will participate in with the Project;

(b) number of Club Members expected to participate;

(c) estimated time commitment expected from each participating Club Member; and

(d) expected monetary or resource commitment expected from each participating Club Member.

6. Miscellaneous Information. Identify any additional information that the Project Allocations Committee should consider in evaluating this Grant Application.

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GRANT APPLICANTS – THIS PAGE IS FOR REFERENCE ONLY SO THAT YOU CAN SEE THE COMMITTEE SCORING CRITERIA. DO NOT COMPLETE THIS PAGE.

PROJECT ALLOCATIONS COMMITTEE 2017-18 Regular Grant Cycle GRANT APPLICATION REVIEW FORM

Project Name: _____

Grant Amount Requested: \$ _____

Funding Recommendation \$ _____

PAC Members Undertaking Review: _____

SCORING GUIDE

Factor	Rubric	Raw Score	Weight	Wt'd Score
Club Member Involvement	10 = High to 1 = Low		30%	
Fulfillment of Rotary Charitable Mission	10 = High to 1 = Low		30%	
Action Plan and associated metrics	10 = High to 1 = Low		20%	
Achievability/Soundness of Goals and Action Plan	10 = High to 1 = Low		20%	
Bonus - If previously funded, how well were the past goals met	10 = High to 1 = Low		15%	
			TOTAL	

NOTE – If a previously funded project, add comments of how the project did against previous year goals:

Additional Comments: