



# A GUIDE TO DISTRICT GRANTS

January 2024

The  
**Rotary**  
Foundation



**District 5040**  
**British Columbia**  
**Canada**

# CONTENTS

---

## INTRODUCTION

- District Grant requirements
- Eligible activities for a District Grant
- Club qualification

---

## 1 MAKE AN IMPACT WITH YOUR PROJECT

- Making an impact
- Start with the community
- Engage your club
- Partner to make an impact

---

## 2 PLAN YOUR PROJECT

- Develop a project plan
- Make it sustainable
- Create a timeline
- Create a realistic budget
- Maintain proper stewardship of funds

---

## 3 APPLY FOR A DISTRICT GRANT

- It's about the money
- District Grant timeline
- Start Here

---

## 4 RESOURCES

- Blue is beautiful
- The District 5040 website is essential
- People you should know
- Forms and other documents



This guide is an interactive document. Throughout the guide you will see words in **BLUE**. If you are reading this guide on a computer or tablet, clicking or tapping on the “blue words” will open a website link or download a file. If you are reading a hard-copy of this guide, **Section 4: RESOURCES** will provide additional information on how to access the links and documents referred to in this guide.

# INTRODUCTION

As Rotarians we contribute our skills, expertise, and financial support to serve our local communities and our global community. This guide will help your club to plan and deliver a meaningful project, funded by a District Grant, that embodies Rotary's motto of "*Service Above Self*"

Funding for District Grants comes from contributions to The Rotary Foundation by Rotary clubs and individual Rotarians in our district . Receiving a District Grant gives your Rotary club both the opportunity, and the responsibility, to carry out the mission of The Rotary Foundation of "*Doing Good in the World*".

**We are Rotarians. We are The Rotary Foundation!**



The  
**Rotary**  
Foundation



The Rotary Foundation  
La Fondation Rotary du  
**Canada**

# DISTRICT GRANT REQUIREMENTS

Rotary club members must be actively involved in the planning and management of all District Grants, and all projects must comply with the [Terms and Conditions for Rotary Foundation District Grants](#).

## YOUR DISTRICT GRANT PROJECT:

- The Project should support the mission of The Rotary Foundation with reference to the Seven Areas of Focus.
- Must have active involvement of Rotarians
- The project may be local or international



Both clubs and the district can use District Grant funds. This guide refers only to Rotary clubs.



## YOU MUST:

- Qualify your club for District Grants every year.
- Sign the club [Memorandum of Understanding \(MOU\)](#)
- Be paid-up for both District and Rotary International dues.
- Be up-to-date with reporting requirements for any previous District Grant. (You can have a previous grant still active, but reporting must be current.)
- Have entered your club's Rotary Foundation giving goals in "Rotary Club Central"
- Have a club president appointed for each year that the project is on-going.
- Apply for a grant by logging in to the District 5040 member area, selecting Grants and then submit a grant request
- Have club funds available to support the project. (Must be cash, not in-kind)



If you are on a computer or tablet, any text appearing in **BLUE** will be linked to a corresponding file. Just click on the **blue words** to open that link.

# ELIGIBLE ACTIVITIES FOR A DISTRICT GRANT

District Grants support both local and international projects within a range of parameters. These include, but are not restricted to, the seven [\*Areas of Focus\*](#) established by The Rotary Foundation. District Grant funds can be used for club projects including:

- **Humanitarian Projects** that lead to community development, peace and conflict resolution, and education (especially literacy)
- **Construction Projects** such as, renovation, repairs and upgrade of infrastructure and buildings
- **Water and Sanitation related projects**
- **Health Projects** such as disease prevention, medical supplies, or immunisation projects (other than polio which is funded separately by The Rotary Foundation).
- Ideally projects will create a tangible asset that will have a lasting impact, are sustainable, are clearly identified as a Rotary project and involve active participation by Rotarians



The district has great latitude in the eligible use of District Grant funds. If you have a question about a project you'd like to propose, consult the District Grants Chair.



A proposal may include up to 3% for administrative expenses (e.g. printing, postage etc)



## SOMETHING TO THINK ABOUT

The Rotary Foundation's **GLOBAL GRANTS** program is a vehicle for your club to think big. Planning your District Grant project can expand your vision to undertake a project well beyond the scope and financial limits of the District Grant. Global Grants have a minimum funding base of US\$30,000. That's just the starting point!

Got your attention? Check out ["A Guide to Global Grants"](#).

Also check out the Grant Management Seminar in the Learning Center at My Rotary



# CLUB QUALIFICATION

In Rotary, we want every grant to demonstrate that we're ethical, responsible leaders who make every donation count. Through our qualification process, your club agrees to follow financial and grant management practices that contribute to Rotary's reputation, and to your club's reputation as a community leader.

Qualifying your club for District Grants takes three steps:

## Attend the District Grant Training Sessions

# 1

Rotarians who are involved in a District Grant project must participate in the District Grant Management training sponsored by the district. You will not be able to submit a grant request until you have completed the training.

A minimum of two members from your club must take the district grant training each year. At least two must have participated in the district grant training seminars; or one member has participated in the seminars and one member has taken the Grants Management Seminar on the E-Learning Center.



A club must be qualified before applying for a District Grant.

## Complete the Memorandum of Understanding

# 2

The [Memorandum of Understanding \(MOU\)](#) is an agreement between your club and the district that outlines The Rotary Foundation's minimum requirements for managing grants. Your club president and president-elect must review and sign the MOU, and return it to the District Grants Chair.



Complete these steps annually to stay qualified

## Agree to additional requirements of the district

# 3

District 5040 requires the following for District Grant applicants. Clubs must:

- Have entered their Rotary Foundation giving goals in the Rotary Club Central area of the Rotary International website
- Be paid up-to-date with their District and Rotary International dues
- Be fully up-to-date with all reporting on any previous grants
- Have a club president appointed for each Rotary year in which the project will be on-going

# 1

# MAKE AN IMPACT WITH YOUR PROJECT

**“Getting something done is an accomplishment.  
Getting something done right is an achievement.”**

# MAKING AN IMPACT

The world, and your local community, have no shortage of problems and needs. And there is no shortage of opportunities to improve or enhance the quality of life in your community, or in another local or international community that you want to support.

Good project ideas can come from a variety of sources. They can come from someone in your club, from an inspirational guest speaker, from a leader in your community, from an appeal from another organisation or another Rotary club, from a District 5040 or Rotary International initiative, and other places. But good ideas don't always turn into a good project.

In receiving a District Grant, you are entrusted with funds from The Rotary Foundation to carry out its mission of "Doing good in the world". Your goal should be to turn a good idea into a good project what will make an impact.

Here's how to make this happen.

## START WITH THE COMMUNITY

**What is a community?** As simple as this question may sound, it is one of the most important questions you should ask when selecting a project for a District Grant. A "community" can be:

- Your nation, city, suburb, or village
- A cultural, ethnic, or economic group (e.g. first nations, immigrant groups, homeless individuals, etc)
- An organisation (e.g a school, sports club, health organisation, etc)
- A group with a common interest (i.e. preserving the environment, restoring an historical site, etc)
- A group with a common cause (e.g. addressing domestic violence, literacy)
- .... and more. Think about who is going to be served by your project. Define the community.

For your project to have an impact, it should be more than just the idea, or passion, of a one person. Individuals are often the source of good project ideas, but it is essential that your project idea is in sync with the needs and priorities of the community it will serve, and that it has their buy-in.

## Why is starting with the community important?

- As Rotarians we have a responsibility to focus our service on the needs and priorities of others, and the only way to do this is to engage the community and find out what those needs and priorities are.
- It is the best way to ensure the project will be embraced by the community and receive its continued support.
- It generates wider support for your project -volunteer, physical, and financial.
- It can attract partners to your project, including in-kind and financial
- It can avoid conflict or resistance to your project.
- It can make the difference between an “OK” project and a “Great” project.



## How do you determine if your project is in sync with the community’s needs and priorities?

- Look at already defined community needs assessments (i.e. long-term plans of the city, town or district, studies and needs assessments by other groups, etc)
- Meet with community officials and other local leaders and listen to their views about the community’s needs and priorities.
- Hold a project assessment meeting within you club to discuss ways to acquire outside input on the community’s needs and priorities.

Did you know that you can use District Grant funds to do community assessment and research for a Global Grant?



**TIP: CHECK THIS OUT**

## **COMMUNITY ASSESMENT TOOLS** **“A resource for Rotary projects”**

Rotary’s [“Community Assessment Tools”](#) is an excellent help for matching your project to the needs and priorities of the community you want to serve.

Don’t be concerned about implementing the wide range of ideas and suggestions offered in these tools. Just let them stimulate your thinking. Further.. the community assessment tools are useful for assessing virtually every service project your club may choose to undertake.

# ENGAGE YOUR CLUB

District Grants aren't about money. The money is only a tool of your project. A District Grant is about people... the people you serve AND the people who carry out the project. The more you engage the members of your club, the greater the impact of your project. This is why:

- More involved Rotarians generate more resources and ideas.
- Club involvement in a project strengthens and energises the entire club.
- Involved Rotarians become future club leaders.
- Many hands make light work... and they often bring their friends along!

Good projects always depend on a Project Leader. But clubs should not place the success of a District Grant project on the shoulders of one person, And, the most enthusiastic leader shouldn't deprive other club members of the benefits and rewards of being involved in the project.

# PARTNER TO MAXIMISE YOUR IMPACT

District Grants often involve a partner, often many partners. Partners play a key role in providing both expertise and resources which are not available within the club. A partner can be:

- Another Rotary club.
- Another organisation
- A business or corporate sponsor



When two clubs partner on a District Grant they can apply for double the amount of funding.

And when three or more clubs partner on a project – you got it... 3x, 4x, etc.

Not only does a partner relationship facilitate the implementation of your project it also:

- Raises the profile of your club in the community.
- Creates relationships for future projects and efforts of your club.
- Opens the door to the possibility of funding for other projects, including grants from other sources.
- Establishes your club as a responsible steward and grant manager

# 2

# PLAN YOUR PRO- JECT

“If you don’t know where you are going,  
you’ll end up someplace else.”

Yogi Berra

## DEVELOP A PROJECT PLAN

A District Grant project doesn't require the kind of detailed planning of a Global Grant project. But you still need to have a project plan

Whether your club manages the entire project, or shares it with a partner, your project plan should clearly address the following:

- The impact you wish to have on the community or individuals benefiting from the project
- The goals and desired outcome of the project
- The actions and steps required to implement the project
- How these actions and steps will be assigned to insure everything is covered
- Alternative approaches or activities in the event your original approach cannot be implemented.



You may not receive the total amount you request in your District Grant application.

What could you do if you only received 70 or 80% of the amount proposed?

## MAKE IT SUSTAINABLE (where applicable)

District Grant projects don't have to be sustainable. Some projects involve a one-off event or activity. But whatever your project involves, be sure to ask the question "Does the project involve an activity or an outcome that is going to carry on after the grant phase has been completed"? For example:

- Will the project outcome require ongoing maintenance by someone?
- Will the project be handed over to other people to deliver?
- Would it be desirable for the project to carry on for another year, or two, or five?
- Are there other follow-on aspects that are related to your project? How will these be addressed? (for example: We propose erecting a water tank for a village that also needs help getting the water to the school. Or, we want to purchase equipment for a health centre that also needs support to train staff to use the equipment)

Projects that make an impact are projects that pay attention to sustainability. A project that provides new bikes for a school isn't maximised if the bikes are sitting broken and rusting a year later. A memorial project in a park that is soon hidden by overgrown bush would be a sad memorial. When you plan your project, please give some

thought as to what's going to happen when you have spent the District Grant funds, and the grants committee has closed your project file.

## CREATE A TIMELINE

A timeline helps make sure that everything is done in a timely manner and that no tasks are forgotten.

District Grant projects are intended to meet an immediate need and to be completed within one year (although they can be extended for two years if needed). Think about how much time is needed for each step of your project. Include events and tasks such as:

- Community assessment and consultation
- Resource consents and other approvals
- Meetings and consultation with cooperating organisations
- Additional fundraising activities, getting business sponsors, organising in-kind support
- Procurement, contracting, and other external services



District Grant recipients must report the status of their project every six months. A project timeline will help you stay focused and complete your project on time.

## CREATE A REALISTIC BUDGET

Because District Grant awards are relatively small, the budget requirements are fairly simple. That said, there will be situations where a District Grant involves multiple partners and may be a part of a much larger project. But whatever the size of the project, there must be a budget and it must be realistic.

Here are some simple tips for a creating a “realistic” budget.

- Don't guess. Don't over-estimate or under-estimate. Get quotes or cost-out actual elements of the project.
- Don't apply for a District Grant amount with the idea the award will determine what your project can buy.
- Itemise. A single line-item on your grant application may represent multiple itemised items in your working plans
- If you are depending on outside funds, corporate/business sponsorships, and/or in-kind contributions, make an effort to lock these in before submitting your grant application, or be confident that you can count on their support.



The club must put in funds to meet the matching requirements. These must be a “real” dollars. In-kind contributions of time or materials, or the value of volunteer time, do not qualify as a match.

## MAINTAIN PROPER STEWARDSHIP OF FUNDS

The Rotary Foundation has an obligation to the many clubs and individuals who have contributed to the Foundation that all funds are responsibly managed. When the Foundation passes these funds into the hands of District 5040 and then on to your club in the form of a District Grant, that stewardship responsibility is also passed on.

As a District Grant recipient, it is your responsibility to maintain clear and accurate records. This includes:

- Maintaining separate accounts for District Grant funds and not intermingling them with club funds.
- Keeping receipts and other records for all expenditures.
- Monitoring the expenditure of funds which are passed on to other organisations.



Keep good records. Up to two District Grants may be audited each year.

## Project Documentation

The District Grants module on the 5040 website supports storing project related documents and the entering and tracking of all income and expenditures. Completion of the Individual Project Report section not only allows you to track your project, it also serves as the Final Report.



Take pictures during your project and obtain copies of any media coverage you receive to include in your Final Report

# 3

# APPLY FOR A DISTRICT GRANT

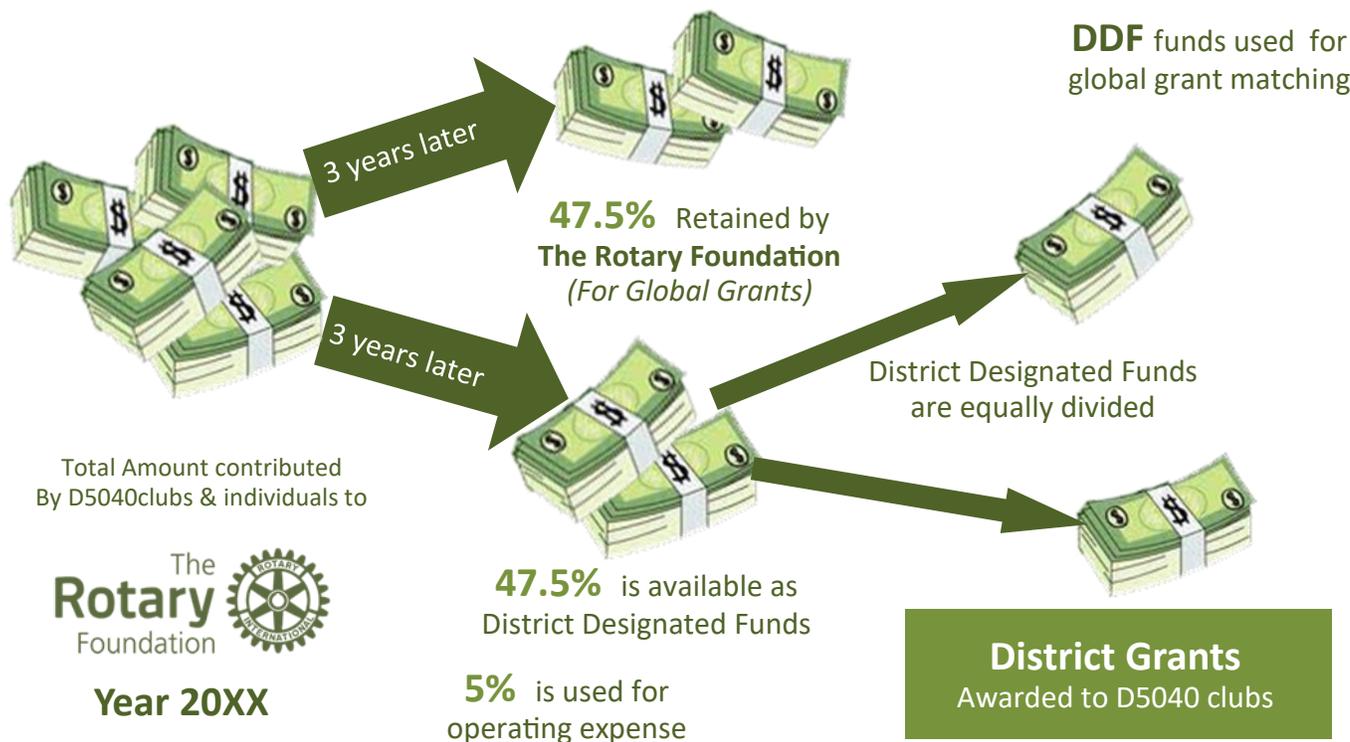
**“The best way to get something done is TO BEGIN !”**

# IT'S ABOUT THE MONEY

**How much can I apply for?** The parameters for District Grants awards are set each year by the District Foundation Committee and noted in the annual [District Grant Guidelines](#). Typically awards range from a minimum of \$1,000 to a maximum of \$10,000.

A club may receive only one District Grant each year unless surplus funds are available. Clubs should rank their grant requests if submitting more than one. However, a club may apply for a new grant even if they have not completed a previous District Grant project, as long as they are current in their reporting for the previous grant.

**Where does the District Grant money come from?** It comes from The Rotary Foundation. And, the amount available for District Grant awards is directly related to the amount contributed to the Foundation by District 5040 clubs and individuals, as shown below.



**Why does it take 3 years for District 5040 contributions to be returned to the district use?** It's because The Rotary Foundation invests the club and individual contributions for three years and uses the earnings from this investment to help cover administrative costs. Very responsible management by our Foundation ... wouldn't you agree?

# GRANT TIMELINE

**IMPORTANT !!!** District Grant funding is based on the Rotary Year which begins on July 1st. **BUT....** It is a good idea to start planning your District Grant project in advance of the new Rotary Year. For example, if your club President Elect wants to have a District Grant project in her/his year, planning should start before they take office. Community needs assessments, project planning, obtaining permissions and agreements with other groups all take time. District Grant applications may be submitted starting in February.

Each year the district Rotary Foundation Committee establishes a [District Grant Timelines](#) which sets out the dates for each step in the grant process. The following is the basic District 5040 timetable.

## February

**President Elect Training (PETS)** Takes place. President Elect works with current club President and the club to identify possible projects. Project planning begins.

## Jan - Feb

### District Grant Training sessions

Grant management webinars take place and clubs sign MOU's. Club members are qualified to apply for a District Grant.

**Grant applications may now be submitted by certified members**

## Feb—May

**Clubs submit grant applications**

**Grant applications close May 24th.**

## Start of the new Rotary Year— July 1

## June - July

District Grants committee reviews all grant requests and submits spending plan. Funds are distributed as soon as they are received from The Rotary Foundation.

## July - June

Clubs complete their projects, submit a final report and receive the last half of their funds

# 4

# RESOURCES

**CONTACTS**

**FORMS**

**DOCUMENTS**

**OTHER RESOURCES**

**“Turning to your resources is what you do when you don’t know what you’re doing”**

## BLUE IS BEAUTIFUL

This **Guide to District Grants** is intended to be used in digital format in contrast to hard-copy form. There is a very good reason for that. Throughout the guide you will have noticed that important forms and resource materials appear in **BLUE**. These blue words are linked to the actual form, download, or resource. All you need to do is click on the words and the resource will appear or the respective document will download.

If you are reading a printed version of this guide you will need to open this guide in the District 5040 website to access the specific forms and documents that the forms, resources, and contact details that appear in this guide.

## THE DISTRICT 5040 WEBSITE IS ESSENTIAL

All of the information you will need and the access to the on-line system to apply for a District Grant are on the [District 5040 website](http://www.rotary5040.org). The direct address of the website is [www.rotary5040.org](http://www.rotary5040.org)

On the home page of the website you will see a Main Menu. Follow Take Action to Foundation/Grants and then click on Grants. You can find all the information you need here to understand what is required to plan for, apply for and manage a district grant project.

You will need to log in to the 5040 web site to enter your grant information, go to the member area, look for Grants and then Submit a Grant Request. The Help option on the menu will help you through using the Grants Module to enter your application.

## FORMS AND DOCUMENTS

Here is a handy list of forms and documents

[District Grant Guidelines](#) Specific guidelines and funding information applicable to the current grant year,

[District Grant Timelines](#) Detailed key dates applicable to the current year

[District Grant Club Authorization Form](#) Form to be signed by the club president and the grant applicant

[Memorandum of Understanding \(MOU\)](#)

[How to Enter a District Grant](#)

[District Grant Completion Checklist](#)

[Terms and Conditions for Rotary Foundation District Grants.](#)