

Rotary District 5500 Policy for District Grants 2025-2026

I. What We Fund

D5500 district grants fund small-scale, short-term projects that address needs in local and international communities. D5500 district grants are specifically intended to promote humanitarian club projects that involve the active, personal participation of D5500 Rotarians. D5500 district grants may be used to fund either local or international projects but must be directly related to the mission of The Rotary Foundation (TRF) and approved by the District Grants sub-committee of the District Rotary Foundation Committee (DRFC.)

II. Restrictions on District Grant Spending

All D5500 district grants:

- a. Must be in accordance with the most recent published edition of The Rotary Foundation's *Terms and Conditions for Rotary Foundation District Grants and Global Grants*.
- b. Are intended to assist clubs with new projects and may also be used to fund a prior project if the beneficiaries involved are new.
- c. Preference is given to club projects that can be completed within the same Rotary year for which the grant is given.
- d. May not be used to fund Vocational Training Teams, Microcredit, or Scholarships.
- e. Are limited to one district grant per club active/open at a time without first obtaining exception approval from the D5500 District Grants Subcommittee.
- f. Require a D5500 club contribution of at least one-half of the total cost of the project in cash and D5500, depending on the availability of funding, may be able to match the clubs cash contributions, dollar-for-dollar, up to a maximum limit of \$4,000.
- g. Require direct and active Rotary club and Rotarian involvement in planning and execution of approved district grant projects. An international project must have direct D5500 Rotary members involvement and execution.

III. Club Qualification Requirements

D5500 requires that clubs requesting Rotary Foundation Grant Funds, whether for District Grants or Global Grants, must be "Qualified." See the policy document Rotary District 5500 Requirements for Clubs to be Qualified to Receive Rotary Foundation Grant Funds (3/11/19). This ensures Rotarians have sufficient knowledge of the grant process, stewardship controls for handling funds, and reporting requirements.

- a. Responsibility for determining Qualification rests with the Stewardship Chair of the D5500 Rotary Foundation Committee.
- b. All provisions of the Club Qualification Memorandum of Understanding (MOU) apply to D5500 clubs when applying for a D5500 district grant with the exception of the requirement in Para 4 requiring a separate bank account for each grant. While a separate bank account is not required for any D5500 district grant, clubs are still required to put controls in place to ensure strict accounting of all district grant funds, funds collected, and funding expenditures.

IV Grant Management Webinar or Seminar

At least two members of a club must review the Grant Management Webinar or attend a Grant Management Seminar to apply for a District Grant. The Club Primary Contact of a grant application must have previewed the Grant Management Webinar or attended a Seminar and can be considered one of the two club members.

V. D5500 District Grant Lifecycle

Approval Phase

- i. The deadline for D5500 District Grant applications is July 31st on the District 5500 DACdb District Grant Module. The D5500 Spending Plan will be submitted to The Rotary Foundation by August 30th and grant funds available in September.
- ii. All district grant requests will be reviewed and approved by the D5500 District Grants Committee.
- iii. D5500 District Grant funds may not be used to fund activities for which the expenses have already been incurred. Any expenses incurred prior to approval of the Application by the D5500 District Grants Subcommittee and the D5500 Spending Plan by TRF may not be used to offset or match D5500 district grant funding.
- iv. Appeal of the decision of the D5500 District Grants Subcommittee may be submitted in writing to the D5500 Grants Subcommittee for arbitration.
- v. The decision of the D5500 Grants Subcommittee is final.
- vi. If grant funds are still available after August 31, applications for a second round up to \$2,000 will be established on a first come, first served basis.

b. Execution Phase

- i. Collection of funds are closely monitored and tracked.
- ii. The club applies the funds to execute the project.
- iii. All receipts for expenditures are collected and retained. Copies are provided to D5500 with the Final Report.

c. Reporting and Closeout Phase

- i. A *Final Report* documenting project completion and disbursement of all funds must be submitted on the District 5500 DACdb Website's District Grant Module within 60 days of project

completion but not later than May 1st of the Rotary Year in which the district grant funds were disbursed.

- ii. If a project is not completed by May 1st, then an Interim Progress Report must be submitted describing what has been done, what remains to be done and the anticipated project completion date.
- iii. All unused district grant funds must be returned promptly to D5500 and will be credited to the district's DDF account with TRF.
- iv. D5500 Rotary clubs failing to remain current in reporting of a district grant may be considered ineligible to receive any further grant funding. If a Final Report is not submitted by May 1st of the following Rotary Year, then a club may be barred from receiving future D5500 grants for a period up to five years.

V. Prioritization of D5500 District Grant Projects

In the event requests for District Grant Funds exceed the funds available from TRF, the District may choose to fully or partially fund projects using the following factors:

- a. A club's contribution two years prior to the Annual Fund.
- b. A club's lack of compliance in prior years with the District Grant process, with the exception of new Rotary clubs.

VI. Cooperating Organizations. Cooperating organizations are reputable non-Rotary organizations or academic institutions that provide expertise, infrastructure, advocacy, training, education, or other support for the grant. Cooperating organizations must agree to comply with all reporting and audits required of TRF and D5500 and to provide receipts and proof of purchase as requested.

When working with a Cooperating Organization, such as a school or school district, the following details must be provided with the application in the form of a signed letter or memorandum of understanding from the organization.

- a. That all appropriate permissions have been granted to proceed with the project.
- b. That any grant and project funding provided to the cooperating organization will be used for project expenses.
- c. Will identify what the cooperating organization will do after the project funds have been spent to insure reasonable continuation (sustainability) of the project.

VII. Payments and Matching Funds

- a. D5500 may match D5500 Rotary club cash contributions for a district grant in an amount not to exceed \$4,000.
- b. In-kind or non-cash contributions are not considered when determining the amount of D5500 funds available for matching the Rotary club's contribution.

VIII. Club Reporting and Documentation

- a. A *Final Report* will be provided to the D5500 District Grants Subcommittee within 60 days of project completion and not later than May 1.
- b. Receipts are required of all items purchased with district grant and/or club project funds.
- c. Clubs are required to retain original receipts for all district grant project expenditures and provide copies to D5500 with their *Final Report*.
- e. Both the district and the clubs must retain copies of receipts related to grant funded expenditures in accordance with local laws and for a period of at least five (5) years following closure of the grant.
- f. All unused district grant funds will be returned to D5500.

IX. How District Grants Are Funded

- a. In addition to club cash, D5500 district grants are funded by up to 50% of the new DDF allocated to us that year. The amount of DDF allocated to us is 50% of our giving to the Annual Fund three years prior.
- b. Each Rotary year D5500 may submit a single grant request (in the form of a *Spending Plan*) to TRF requesting payment to us of that 50% of our new DDF.

X. Using District Grant for Global Grant Community Assessment

Since TRF specifically states that Global Grant funds may not be used to cover the cost of completing the required GG community assessment, a D5500 District Grant may be requested to accomplish this requirement within the following guidelines.

- a. That the use of D5500 district grant funding is intended to contribute toward meeting the expenses of accomplishing the required GG community assessment but is not necessarily intended to fully fund the cost of the assessment. Use of grant funds are not limited to travel but may be used for valid GG community assessment expenses.
- b. That the request for district grant funding for a GG community assessment will be submitted in the same manner as any other district grant project and clubs are, therefore, required to provide a D5500 District Grant Application, matching club cash contribution, and a Final Report IAW existing D5500 district grant guidelines.
- c. An application for a District Grant to fund a Community Assessment must include a statement from the D5500 Global Grants sub-committee that the proposal for the Global Grant has been reviewed; it has a credible and well thought out plan; the club has demonstrated an intent to follow it through; and the sub-committee authorizes the District Grant application to be submitted. Completion of a Community Assessment is recommended before a draft application for a Global Grant is started.

- d. That D5500 district grant funding will be used for the GG community assessment only. Funds are not to be used to fund other travel or any other work not directly associated with accomplishing the community assessment.
- e. That if a club chooses to use a D5500 district grant to help accomplish a GG community assessment, that grant will be considered the clubs one district grant until closed out with a Final Report.

XI. Special Considerations

- a. International Projects. Although an international club may assist in a District Grant project, the D5500 club is the planner, driver and executor of the project.
- b. Global Grant Needs Assessments. D5500 district grants may be used to fund the completion of TRF required Rotary Global Grant Community Assessment associated with an active application for a D5500 club sponsored Global Grant.
- c. Construction. While D5500 district grant funds may not be used to purchase land or buildings, they may be used to fund limited, new construction within the parameters of the approved grant.
- d. Competitive Bids. D5500 encourages Rotary clubs to use a competitive bidding process when selecting a major supplier of an item over \$2,000.
- e. Conflict of Interest. If a major item or service (in excess of \$1,000) is provided by a Rotarian, a Rotarian's business, or a family member of a Rotarian, then an explanation must be included in the *Final Report* explaining why the item or service was not a conflict of interest and why it was in the best interests of the project and the Rotary club to use the selected source.
- f. Travel Arrangements and Insurance Coverage. All travelers are responsible for making their own travel arrangements. They may work with Rotary International Travel Service (RITS) or they may make their own arrangements. Travelers are also responsible for obtaining their own travel insurance, which may be purchased with grant funds.
- g. Failure to Comply. Rotary clubs that fail to adhere to TRF or D5500 policies and guidelines in implementing and financing grant projects must return all district grant funds in their entirety and may be barred from receiving future D5500 grants for a period of up to five (5) years.