

2026-27 District 6510 Grant Management Qualification Test

The purpose of this document is to lead you through the process of becoming District Certified to receive a District Grant. You will understand how to manage a Rotary Foundation grant; learn stewardship expectations; implement the Memorandum of Understanding (MOU); and qualify your club to receive District Grant funds. **For your club to be qualified to receive a District Grant you must complete the questions in this document on the answer sheet and email them to the District Rotary Foundation Chair. If you have never submitted a district grant in the past, you should also complete a test grant on DACdb.** Please complete the questions at the end of each section and **email your answer sheet** to: gregjones5300@gmail.com with District 6510 Grant Certification and your club name in the subject line.

1. To be certificated for a District Grant the Rotarian must be successful in answering the Grant Management Qualification Test questions.

True

False

How do you manage a Rotary Foundation grant?

A global grant must have an international partner, a separate bank account for the grant money, a community assessment for the purpose of the global grant and be sustainable. A District Grant does not have to meet the same qualification as a Global Grant in that it doesn't need a separate bank account for the money, it doesn't need to provide a formal community needs assessment nor have a sustainability plan. For a District Grant the club should talk with the community and the recipient of the project to be sure the grant is needed.

The District Grant money comes from District Designated Funds (DDF) based on the Annual Funds total received from members of our District 3 years previous.

When the Annual Fund is dispersed 47.5% of it that was designated for “SHARE” comes back to our District; 47.5% goes to the World Fund; and 5% goes to operating expenses. Fifty percent (50%) of the DDF that comes back to the District may be used for District Grants and the other 50% is used by the District to support Global Grants and Polio Plus.

2. District Grants and Global Grants have the same qualifications to meet.

True

False

3. The money for the District Grants comes from district dues.

True

False

What are the stewardship expectations?

The club requesting a District grant must provide copies of expense receipts and checks written for expenses. It does NOT have to have a separate checking account for the District Grant money.

If there is a conflict of interest, an explanation of the conflict should be included in the Grant documentation. Example: A club member has a hardware store at which material has been purchased would be a conflict of interest. A letter stating why the hardware store was chosen would be included – the only hardware store in the community or had the lowest price.

In the District Grant Application, a budget must be included. That topic will be covered later in the Grant module training.

All records must be kept for at least 5 years for audit purposes. The records should be kept as a hard copy as well as a digital copy. The digital copy is stored in the DACdb grant information for your club.

The final and/or interim report must be completed and submitted to the District on DACdb. A Rotary club cannot receive another District Grant if the previous grant's final or interim report has not been completed and submitted. Also, the Rotary club must be in good standing with the District and Rotary International to receive a District Grant.

Note: Interim report is used when an extension is needed for the completion of the District Grant. Examples: Weather cause unfavorable conditions for the completion of the grant; The supplies for the project were delayed in shipping. Once the grant is completed the Club will need to submit the final report at the later date.

4. For a District Grant the Grant team must:
 - a. Have Rotarian supervision of the grant's monies.
 - b. Maintain and keep a financial accounting of all monies.
 - c. Reports must be submitted in a timely fashion.
 - d. All irregularities must be reported.
 - e. All of the above.

5. You can apply for a District Grant without successfully completing and submitting your final report or an interim report for the previous year's grant.

True

False

District Funding Guidelines

District guidelines for the Rotary year 2026-2027 are:

1. The District Grant can fund up to 2/3 of the project, subject to the maximum grant limit. Example: The Rotary Club has a project budget of \$1,500. The Club will provide \$500 and the District Grant will provide \$1,000. All other funding for the project will come from the club or partners in the community.
2. The maximum District Grant will be \$2000.00 unless funds allow otherwise.
3. If club requests exceed district funds available, proportional adjustments will be made to the amount allocated to the clubs. Example: the District has \$35,000 of total District Grant funds available. Requests for funding of \$40,000 are received from District clubs. All clubs will receive 87.5% of their requested amount.
4. You can partner with other Rotary Clubs on a project with each Rotary club contributing its grant funds to the project. Each club must contribute financially to the project. One club would be the lead club.
5. Contributions from the Rotary Club will be raised by Rotarians or can be from existing club funds.
6. Funds cannot be raised from beneficiaries in exchange for the grant.
7. Your club's matching funds cannot come from another grant.
8. The application deadline is April 30. Any grant requests received after that date will only be funded from District Grant funds remaining after all timely requests are funded. Grants received after that date will be funded first come, first served from funds remaining.

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6. The Rotary Club may raise money for their project by:
- A. Having fundraisers for the project.
 - B. Receiving donations from community organizations and individuals.
 - C. Applying for other grants.
 - D. Having the beneficiary of the grant contribute the Rotary club's financial part of the grant.
 - E. A and B
 - F. All the above

How do the clubs implement the Memorandum of Understanding (MOU)?

The MOU is a document that documents the Rotary Club's understanding of and it's willingness to complete the requirements of The Rotary Foundation (TRF) in the handling of all money received from (TRF). This document is found on DACdb under public files. It includes: Club Qualifications; Club Officer Responsibilities; Financial Management Plan; Bank Account Requirements; Report on Use of Grant Funds; Document Retention; and Reporting Misuse of Grant Funds. This document is a legal document between the Rotary Club and The Rotary Foundation.

The current Club President and the current Club President Elect must sign the MOU. **All certificated club members are also to sign the MOU, including the current Club President and the current Club President Elect if they have been certificated.**

The MOU signature page will be filed in the documents section of the submitted District Grant.

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7. Who must sign the MOU ?
 - A. The Current Club President
 - B. The Current Club President-Elect
 - C. All Grant Certified Members
 - D. A and B
 - E. A, B, and C

 8. The MOU is a legal document.
 - True
 - False

What is the timeline for the District Grant?

The District can apply for the 26-27 District Grant after July 1, 2026. No fundraising or work on the project can happen before July 1.

March 1 – March 31: Clubs complete qualification.

April 1 – April 30: Clubs may apply for District Grants.

May 1 – May 31: Applications are reviewed and approvals are made.

July 1: The District submits the District Grant request to TRF.

July 1: Rotary Club may start the District Grant project. No fundraising or prebuilding is accepted before July 1.

August/September: District Grant funds are received from TRF by the District and District Grant checks are delivered to the clubs.

January/February: Final completion of project and submission of the final or interim report before March 1.

March: The District reviews the final reports for acceptance. And files the report with TRF.

March: the next year's District Grant cycle begins.

9. All activity including fundraising and working on the project must be done in the funding Rotary 26-27 year unless an extension is granted on the work.

True

False

10. The District Grant proposals may be submitted during the window of April 1 through April 30.

True

False

11. The Rotary Clubs will receive their grant checks after the completion of the project.

True

False

Is your Rotary Club qualified to receive District Designated Funds for a District Grant?

Have you completed the District Qualification Test and sent your answers to Greg Jones, District Rotary Foundation Chair at gregjones5300@gmail.com? Have you completed your test grant on DACdb and submitted it?

Your club must have at **least 2** Club Members certified to receive a District Grant. It is recommended to have more than 2 members certified encase a certified member is not available to sign the District Grant when submitted and the final report is submitted.

Your club must be current on all prior District Grant reports to be qualified to receive a grant in 26-27.

Your club must have representation at Land of Lincoln PELS (or another PELS session as approved by the District Governor Elect.

Your club must be current with District and Rotary International dues.

If all the above has been done you will receive notification that you are Grant Certified.

Grant certification must be completed yearly.

12. How often does a Rotarian need to be Grant Certified?

- A. Yearly
- B. Every other year
- C. Every third year

13. How many members must a Rotary Club have certified to receive a District Grant?

- A. One
- B. Two
- C. Three
- D. Four

Best Practices

1. Make sure the project is something that your community and any specific beneficiaries actually want.
2. Have a project committee of 3 or more people.

3. At least one committee member should be familiar with DACdb.
4. One committee member should be responsible for photographing the project from the beginning to completion with photos of Rotarians in action.
5. Publicize the project in news and social media.
6. Plan to complete the project early in the Rotary year. Do not wait until the deadline of March 1 to start!
7. Have a plan to keep the hard copy records for the project for 5 years.

Required Documentation

1. Letters of cooperation are **required** from all organizations participating in the project. Example: Your club project is building an access ramp for the Senior Citizen building. You must have letter of cooperation from the Center and the City (if City owned). If you have partner in your project you must have a letter of cooperation from that partner.
2. The club's MOU.
3. Budget.
4. Copies of expense receipts and checks.
5. Photos (action photos are best).

14. Now you are ready to go through the DACdb training for the District module.
True
False