D5040 District Grants 2026-2027

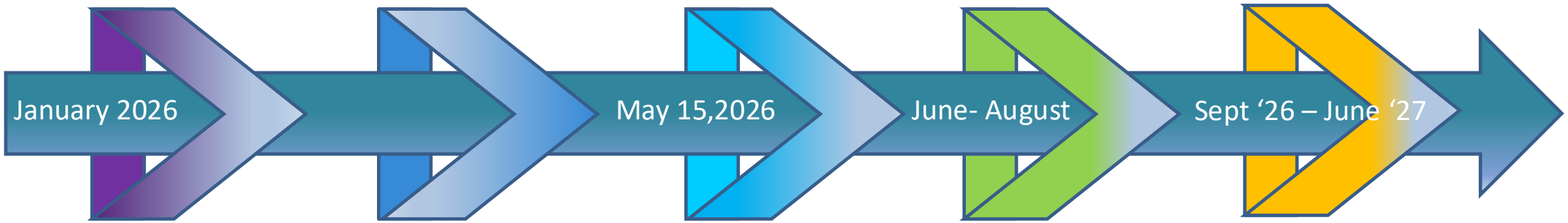
Agenda

- Timeline
- District Grants and your Projects
- Qualify Your Club – for District Grants Applications
- Applying for a District Grant
- Review and Summary

Liz Scroggins
District Grants Chair 2024-27
Rotary District 5040
Rotary Club of Whistler Millennium

Rotary District 5040 | District Grants

District 5040 Grants Timeline for 2026-2027



- District grants training
- Applications open
- MOU's signed
- Clubs qualified

- Clubs submit
- grant
- applications

- District grant applications close
- Deadline May 15th

- Approved projects are submitted in a spending plan to TRF
- FINAL REPORTS for 2025-26
- Funds received from TRF and 1st payment are distributed

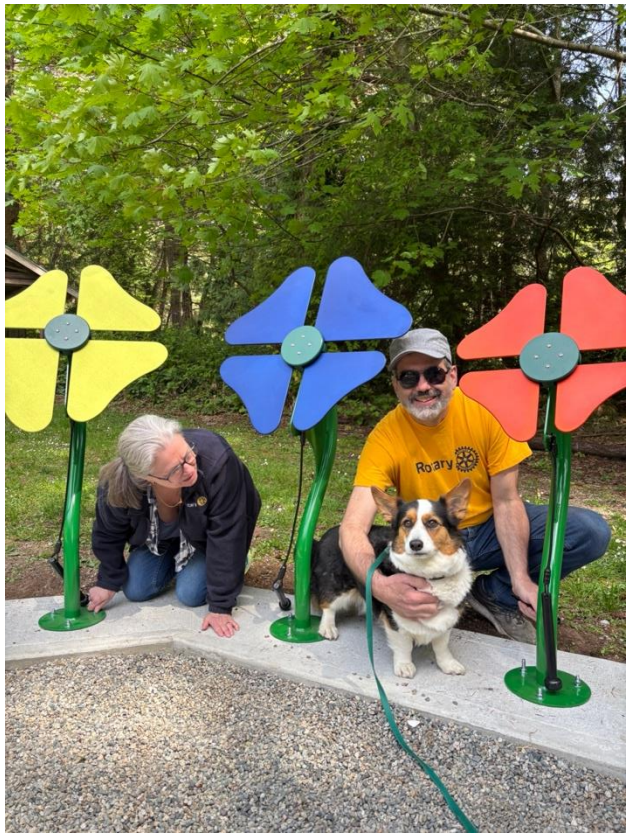
- Projects are completed
- Final reports are filed and final payment is distributed

Rotary

THE MAGIC OF ROTARY

D5040 District Grant examples – local community

A District Grant can help you complete a project in your local community:



Powell River – Musical Playground
District Grant $7,500

Lionsgate – Warehouse Food Storage Boxes
District Grant $1,246

D5040 District Grant examples – local community

Williams Lake Daybreak Boulder Park

Budget	$115,000
Club	$ 20,000
District Grant	$ 5,000
Sponsors	$ 90,000

THE WILLIAMS LAKE TRIBUNE

Williams Lake Bouldering Park officially opens

Balloon, speeches and a barbecue were part of the event

Angie Mindus
Oct 2, 2023 5:00 AM

D5040 District Grant – 2 Whistler Clubs working together

Whistler

Rotary Bike Park

Phase 1- club $28,000

Phase 2- $40,000

2 Clubs $20,000

District Grant $20,000

Phase 30 $5,000

TOTAL $73,000

Rotarians involved approx 30

D5040 District Grant examples - International

A District Grant can help you complete a project in your international community :

Rotary Club of Whistler Millennium
Purchase and installation of a drip irrigation system
Engaruka English Medium Primary School in Tanzania
Budget $15,952.80 Grant $5,300

D5040 District Grant examples - International

Rotary Club of Tsawwassen
2 – 10,000 litre rainwater storage tanks Ngamba Secondary School and Kamale Primary School – Kenya
Budget $4,692 Grant $1,564

D5040 District Grants 2026-27

FUNDING FOR: short-term, small-scale projects with a grant from C$1,000 to C$10,000.

PURPOSE: to address needs in your community and abroad.

HOW TO APPLY: after becoming qualified, club members apply to the District using the Grants module on the District website.

HOW IT WORKS:

- **The District is allocated funds by the Rotary Foundation (District Designated Funds or DDF).**
- **DDF comes from donations made to the Rotary Foundation Annual Share Fund 3 years ago.**
- **Applications approved by District & Rotary Foundation.**
- **For 2026-27 we will have about C$74,290 available for District Grants.**

The Rotary Foundation

D5040 District Grants

Before you can apply for a Grant you must:

1. **Qualify your Club.**
   - **Have at least 2 trained members.**
   - **Sign the Memorandum of Understanding – MOU 2026-2027**
2. **Only trained members can apply for and update grants**
3. **Plan your Project**
   - **scope**
   - **partners**
   - **budget**
   - **resources**
   - **timescale**

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D5040 District Grants

QUALIFICATION REQUIREMENTS 2026-27

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Qualify Your Club – applies to District Grants

- Qualification must be completed each year.
- The qualification process helps ensure that your club understands the grant process, and your stewardship & financial responsibilities.
- To qualify:
  1. at least two members of your club participate in the District 5040 District Grants training sessions (this session).
     OR at least one member attends the District Grants training, and one other member takes the Grants Management Seminar in the Learning Center on My Rotary.
  2. Your President and President-Elect * must sign the MOU.

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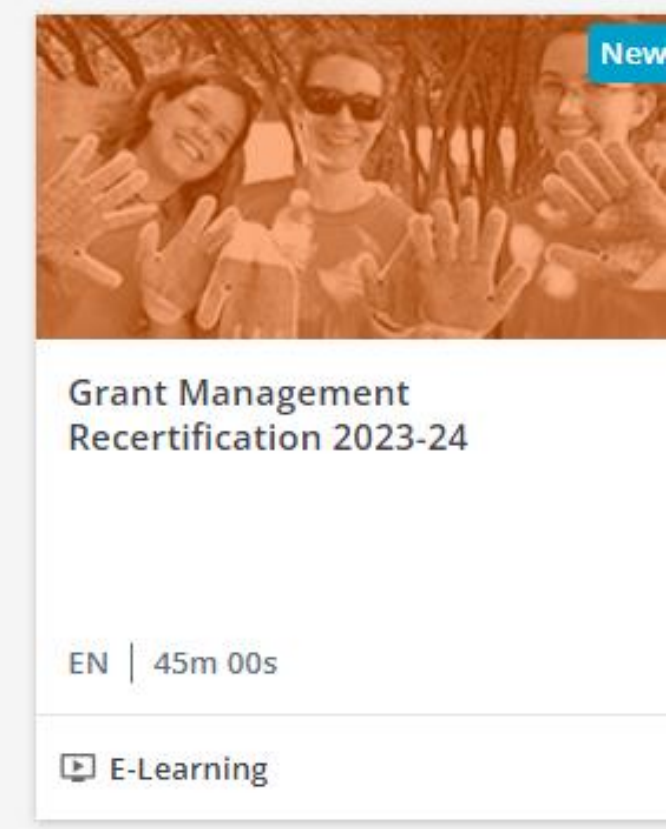
Grants Management Seminar & Re-certification

People who have completed the full 10-course seminar will now need to take just the Grant Management Recertification course each year.

To qualify, send me a copy of the course certificate.



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Memorandum of Understanding (MOU)
- signed by President & President-elect

"The Memorandum of Understanding is an agreement between the club and the District and the Rotary Foundation and acknowledges that the club will undertake measures to ensure the proper stewardship and implementation of grant supported projects."

- **Have a proper financial management plan**
- **Maintain copies of all financial transactions**
- **Accurate and timely reporting**
- **Ensuring no conflict of interest**
- **Report potential or real mismanagement of grant funds**

The Rotary Foundation or the District Grants committee may audit clubs or projects.

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The District maintains an on-line record of qualified members and clubs

Qualified Clubs

« Previous Year | 2021 - 22 | Next Year »

In order to be qualified to submit a grant application, a club must satisfy the following criteria:
1) Sign a Memorandum of Understanding for the year of the Grant Application
2) Have at least 2 trained members

Qualified	Club Name	Trained Members	MOU	
	100 Mile House	0 View Members	✓	Edit
✓	Bowen Island	3 View Members	✓	Edit
✓	Burnaby	3 View Members	✓	Edit
✓	Burnaby Deer Lake	4 View Members	✓	Edit
✓	Burnaby Metrotown	2 View Members	✓	Edit
	Burns Lake	3 View Members		Edit
	Dragon Club	1 View Members	✓	Edit
✓	Gibsons	4 View Members	✓	Edit
✓	Kitimat	5 View Members	✓	Edit
✓	Ladner (Delta)	4 View Members	✓	Edit

Member Qualification and On-Line Access

District Grant requests must be made through the Grants module on the D5040 website.
***NOT** on the Grants Center in My Rotary.*

Only qualified members have access to apply for or update grants on the system.

Members who take this session will have access rights valid until June 30th 2027.

Members who take the Grants Management Seminar or the Re-Certification course need to send a copy of their certificate of course completion to the District Grants Chair and will be valid for 12 months.

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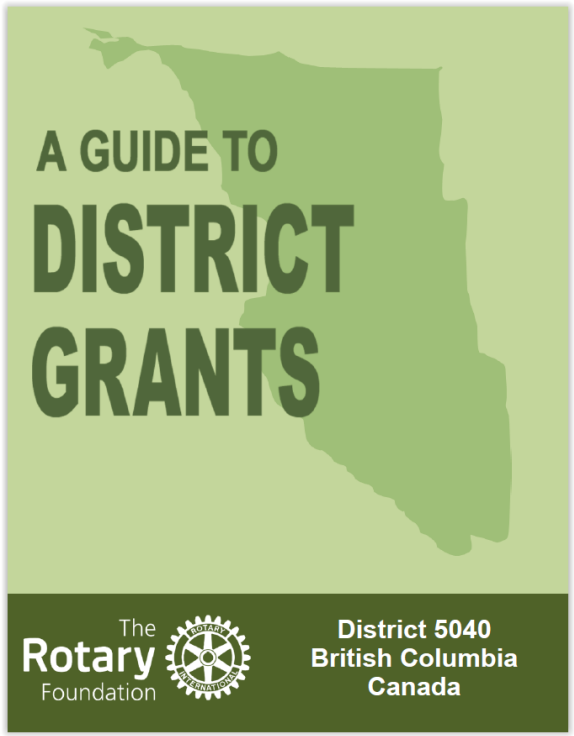
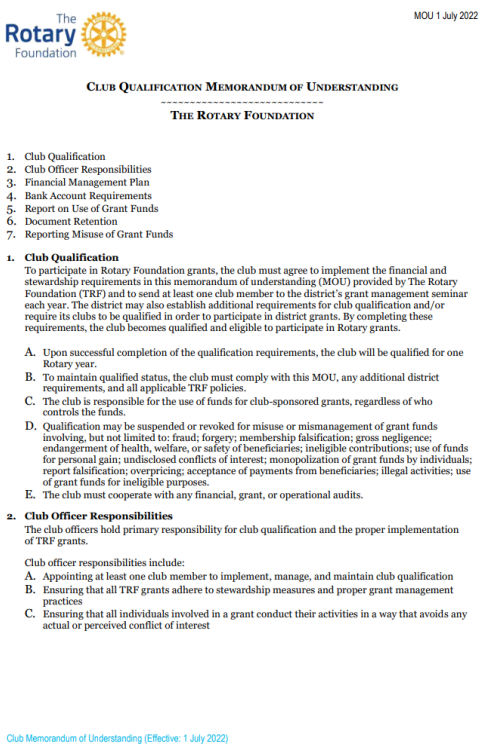
ROTARY FOUNDATION GRANTS – key documents




The Rotary Foundation

MOU 1 July 2022

CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING
THE ROTARY FOUNDATION

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds

1. Club Qualification
To participate in Rotary Foundation grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF) and to send at least one club member to the district's grant management seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in district grants. By completing these requirements, the club becomes qualified and eligible to participate in Rotary grants.

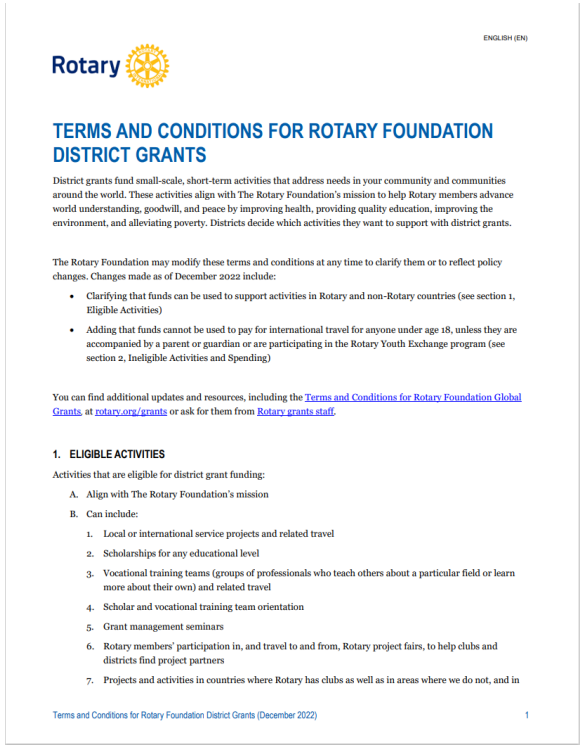
A. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.
B. To maintain qualified status, the club must comply with this MOU, any additional district requirements, and all applicable TRF policies.
C. The club is responsible for the use of funds for club-sponsored grants, regardless of who controls the funds.
D. Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes.
E. The club must cooperate with any financial, grant, or operational audits.

2. Club Officer Responsibilities
The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants.

Club officer responsibilities include:
A. Appointing at least one club member to implement, manage, and maintain club qualification
B. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices
C. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest

Club Memorandum of Understanding (Effective: 1 July 2022)

Memorandum of Understanding


ENGLISH (EN)

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TERMS AND CONDITIONS FOR ROTARY FOUNDATION DISTRICT GRANTS

District grants fund small-scale, short-term activities that address needs in your community and communities around the world. These activities align with The Rotary Foundation's mission to help Rotary members advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty. Districts decide which activities they want to support with district grants.

The Rotary Foundation may modify these terms and conditions at any time to clarify them or to reflect policy changes. Changes made as of December 2022 include:

- Clarifying that funds can be used to support activities in Rotary and non-Rotary countries (see section 1, Eligible Activities)
- Adding that funds cannot be used to pay for international travel for anyone under age 18, unless they are accompanied by a parent or guardian or are participating in the Rotary Youth Exchange program (see section 2, Ineligible Activities and Spending)

You can find additional updates and resources, including the Terms and Conditions for Rotary Foundation Global Grants, at rotary.org/grants or ask for them from Rotary grants staff.

1. ELIGIBLE ACTIVITIES

Activities that are eligible for district grant funding:

A. Align with The Rotary Foundation's mission
B. Can include:
   1. Local or international service projects and related travel
   2. Scholarships for any educational level
   3. Vocational training teams (groups of professionals who teach others about a particular field or learn more about their own) and related travel
   4. Scholar and vocational training team orientation
   5. Grant management seminars
   6. Rotary members' participation in, and travel to and from, Rotary project fairs, to help clubs and districts find project partners
   7. Projects and activities in countries where Rotary has clubs as well as in areas where we do not, and in

Terms and Conditions for Rotary Foundation District Grants (December 2022) 1

T&Cs for Rotary Foundation District Grants

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These documents are all available on the District 5040 website.
Reviewing these should be your first step in applying for a grant

District Grant Funds available for 2026-27 ~ C$74,290

2023-2024

Total Amount contributed By D5040 clubs & individuals to the annual fund share

3 years later

3 years later

2026-2027

47.5% Retained by The Rotary Foundation The World Fund *(For Global Grants)*

47.5% District Designated Funds, Global + District

District Designated Funds are evenly split

District Designated Funds (DDF) used for matching in Global Grants

District Designated Funds (DDF) available for District Grants

approx.

C$74,290*

(*depends on monthly RI Exchange Rates)

DISTRICT GRANTS – allocating the ~C$74,290

1. **Clubs submit District Grant applications via the Grants module on the D5040 website.**
2. **After applications close on May 15, applications are reviewed by the District Grants Committee.**
3. **We submit a spending plan of the approved District Grant applications to the Rotary Foundation.**
4. **We receive back single block grant to fund approved projects.**

   Administered by the District Foundation Committee with more flexible guidelines.

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District Grant Award Statistics

Grant Year	Block Grant Total US $$	Grants Approved Total US $$	Number of Clubs Participating	Number of Grants	Average Grant Award US $$
2016-2017	$66,879	$66,532	19/48	26	$2,559
2017-2018	$66,442	$65,405	13/51	16	$4,088
2018-2019	$51,816	$51,161	10/50	18	$2,842.
2019-2020	$80,262	$80,262	17/50	26	$3,087
2020-2021	$76,139	$76,139	22/49	34	$1,884
2021-2022	$62,079	$62,079	14/49	19	$4,379
2022-2023	$55,138	$55,138	12/49	13	$3,938
2023-2024	$71,485	$61,085	13/48	17	$3,593
2024-2025	$70,724	$68,315	15/48	15	$4,714
2025-2026	$63,209	57,441	11/48	11	$5,746

Congratulations to these 11 clubs who received a District Grant for the 2025/2026 Rotary Year

Project	Sponsoring Club	Grant Amount CA$
Coast2Coast Trail- The creation of a multi-use greenway spanning the Tsawwassen peninsula linking natural areas and neighbourhoods. Over a 5 km route. Signage along the route will provide visibility for the Rotary Club. The overall budget is over $200,000 and will be done in cooperation with the City of Delta.	Tsawwassen	$ 10,000
Signal Hill Elementary School Greenhouse-Construction of a greenhouse for growing food, storing harvested produce and space as an outdoor classroom. The greenhouse will enhance the existing outdoor school garden, partially funded by the Rotary Club in 2020.	Pemberton	$9,000
Sustainable Water Storage and Irrigation System for Engaruka Middle School, Tanzania. Funds to support the installation of a sustainable water storage and gravity-fed irrigation system for the school, which grows food for 400 + students and supports the local villagers as well.	Whistler Millennium	$6,000
Coats for Kids -purchase and deliver a winter coat to any child in Burnaby who are in need of a winter coat, working with the Burnaby School District and community organizations.	Burnaby Metrotown	$6,000
BC & Alberta Guide Dogs neonatal lab vet equipment- fund the		

Congratulations to these 11 clubs who received a District Grant for the 2025/2026 Rotary Year (cont'd)

Project	Sponsoring Club	Grant Amount CA$
Whistler Bike Park Plaza-A new community amenity project with the Whistler and Whistler Millennium Clubs, consisting of picnic tables, benches, bike rack and repair stations and a refurbished concession stand for events. In partnership with the Resort Municipality.	Whistler	$20,000
Quesnel Search and Rescue- Portable AED's- Assist the QSAR with the purchase sof two portable AED's for assistance in various medical emergencies	Quesnel	$1,900
Special Education for Vulnerable Refugee Women in Uganda- In cooperation with the Human Rights Defenders Solidarity Network, a 6 month training program will train 100 refugee women in learning English	Burnaby	$3,250
Armours Beach Improvement Project- Phase 2-In collaboration with the Town of Gibsons and Elphinstone Interact Club, the project will provide active and free outdoor space for youth.	Gibsons	$10,000
Buddy Benches & Food Security for Sechelt Community Elementary Schools-Supply and install Buddy Benches at the playgrounds through the school's PAC programs and assist with school food security programs.	Sunshine Coast-Sechelt	$10,000

SUCCESSFUL GRANT PROJECTS

- Meet community needs
- Are identified as being a Rotary Project
- Are sustainable
- Involve members and/or a partner
- Have a firm implementation plan
- Have a financial management plan

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Successful Grant Funded Projects

More of This

Less of This

Rotary District 5040 | District Grants

Recent Changes and Limits for District Grants

The *District will match $1 of District Designated Funds to each $1 of cash contributions* for club sponsored local community projects that:

- 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 will match $.50 of District Designated Funds to each $1 of cash contributions for club sponsored projects that are seen as basically a contribution to another organization.

For any single grant project

- The maximum District Grant funding is $10,000
- The minimum grant will be $1,000.

Scholarships, Youth Exchange, and RYLA are not supported by district grants in D5040.

Subject to the availability of funds

Applying for a District Grant

- Must be done online in the Grants module on the D5040 website- www.rotaryy5040.org. *NOT the Grant Centre on My Rotary!*
- Only members who are qualified can apply for and manage District Grants.
- Clubs submitting more than one grant request must rank their requests.
- Projects must NOT start until you receive notification that your application is approved.
- 50% of grant funds released when the block grant is received from the Rotary Foundation.
- 50% released when the project is complete and the final report is done and accepted.

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Club Authorization Form

- **Required for each Grant application/project**
- **Signed by Club President and applicant**
- **Identifies 3 people involved in the project**
- **Filed in Documents section of the Grant Application**

Rotary District 5040

District Grant Club Authorization Form

Rotary Club:

Year:

Project Name:

We hereby authorize our club to apply for a district grant and agree to enter all project tracking information along with a final completion report on the District 5040 website.

Club President:

Grant Applicant:

Please enter the names of at least three club members who are on the project committee:

1)

2)

3)

Project Example

Budget:	**$20,000**
Funding:	
• **Club funds**	**$10,000**
• **District Grant**	**$ 5,000**
• **3rd Party Donations**	**$ 5,000**
	$20,000

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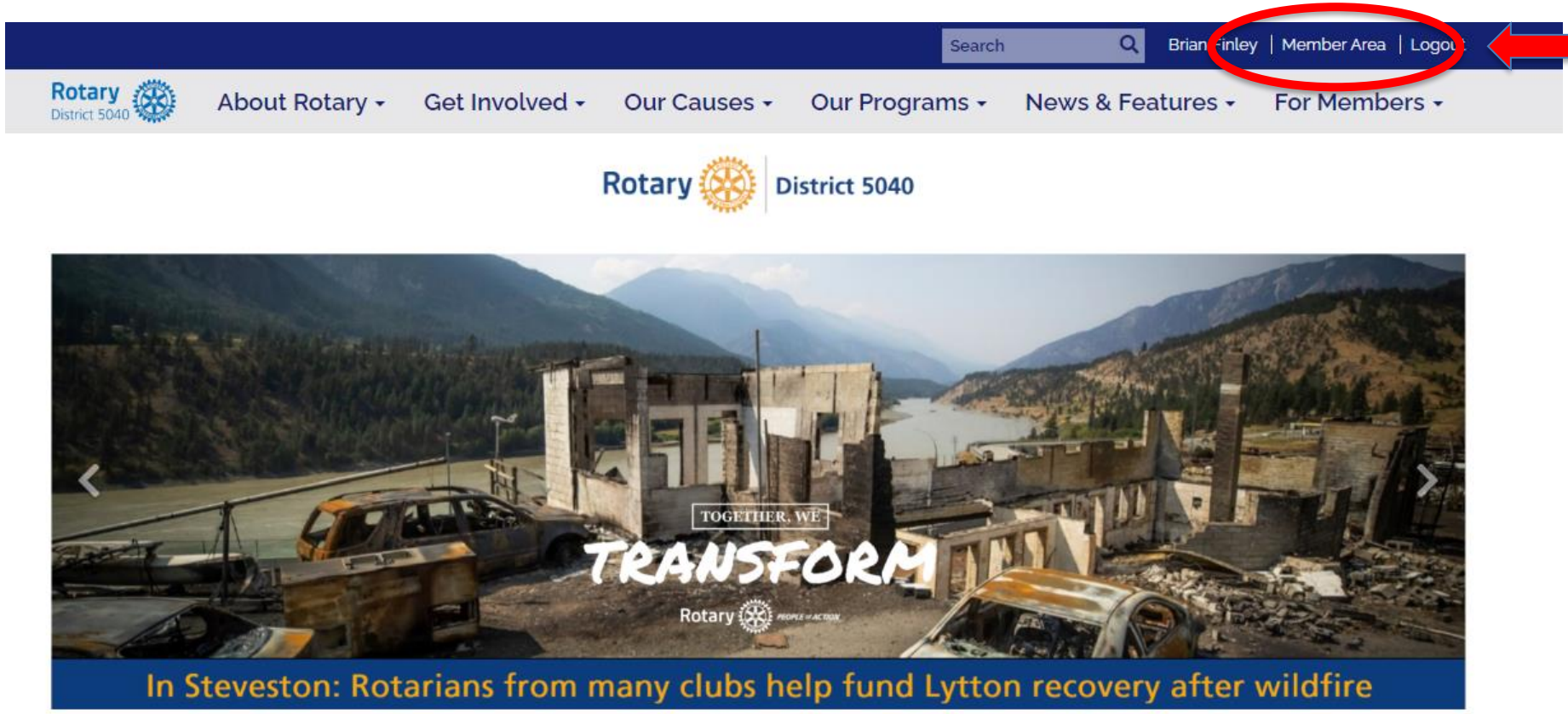
Starting a District Grant on the D5040 website - www.rotary5040.org

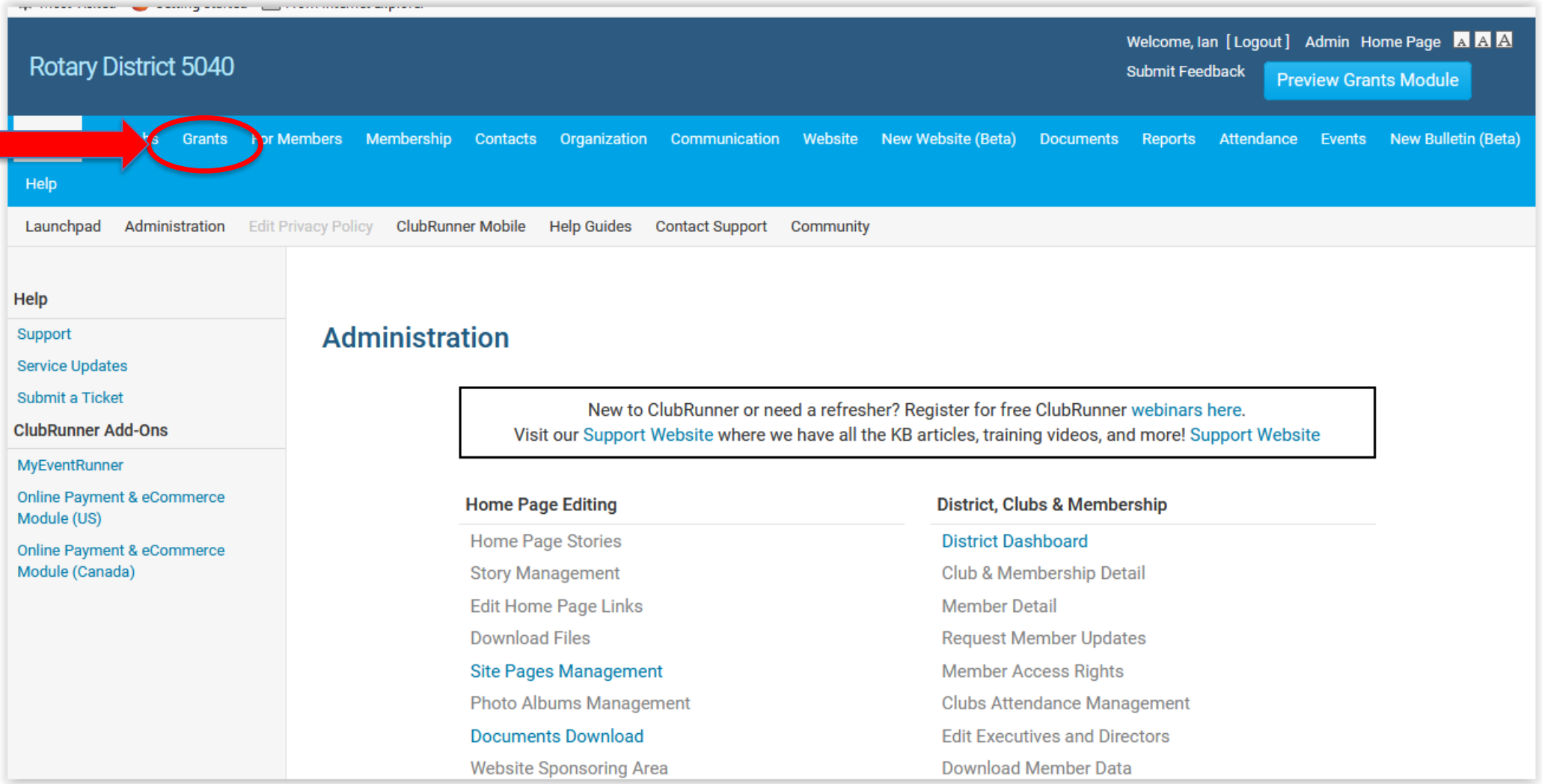


First, login to the D5040 website & go to Member Area

Your login is the same one you use for logging into your club's site

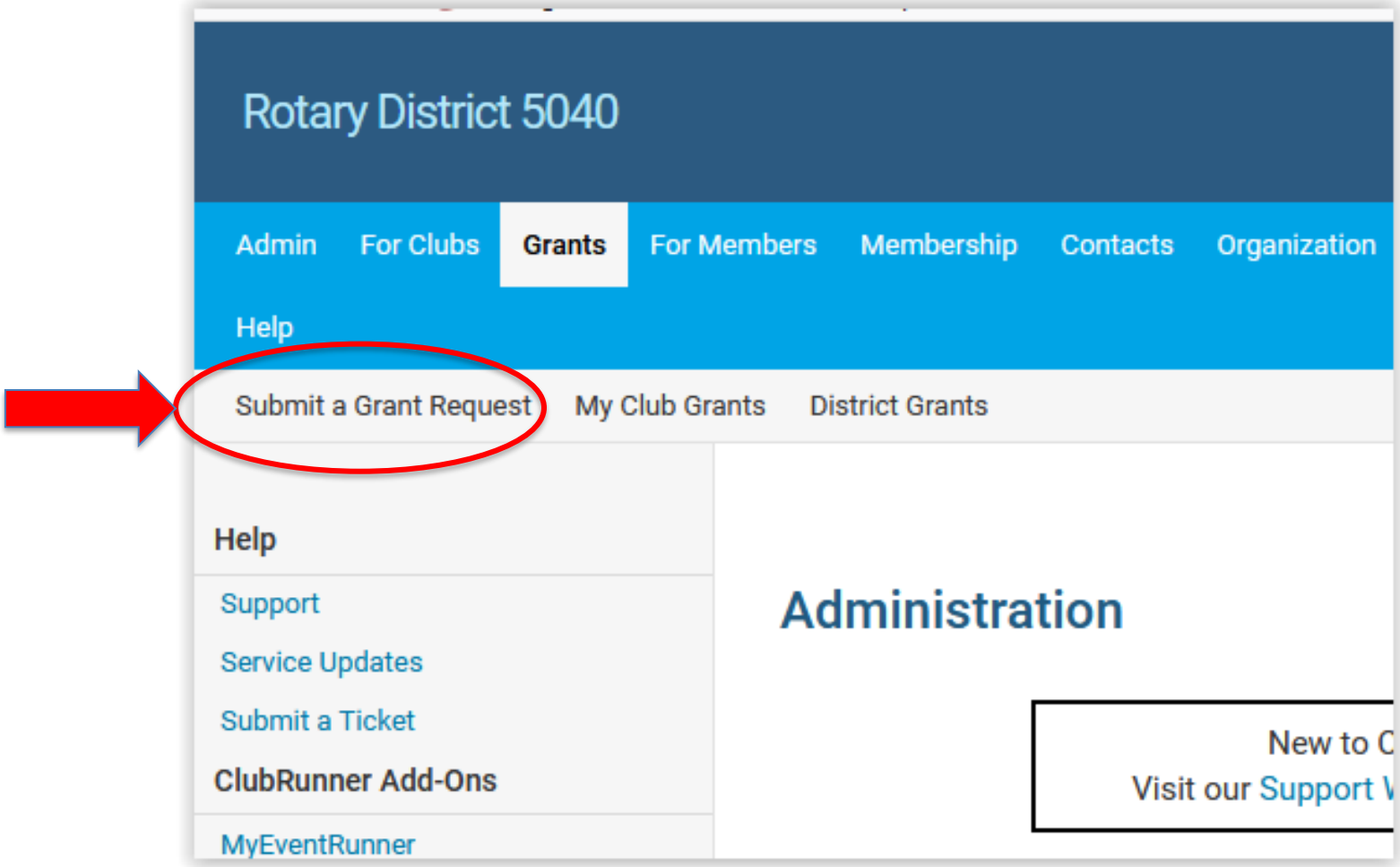
Starting a District Grant

Click on Grants



Step 1. Starting a District Grant

To start a district grant, click on submit a grant request, after you have started entering a grant you will be able to return to it by clicking on My Club Grants

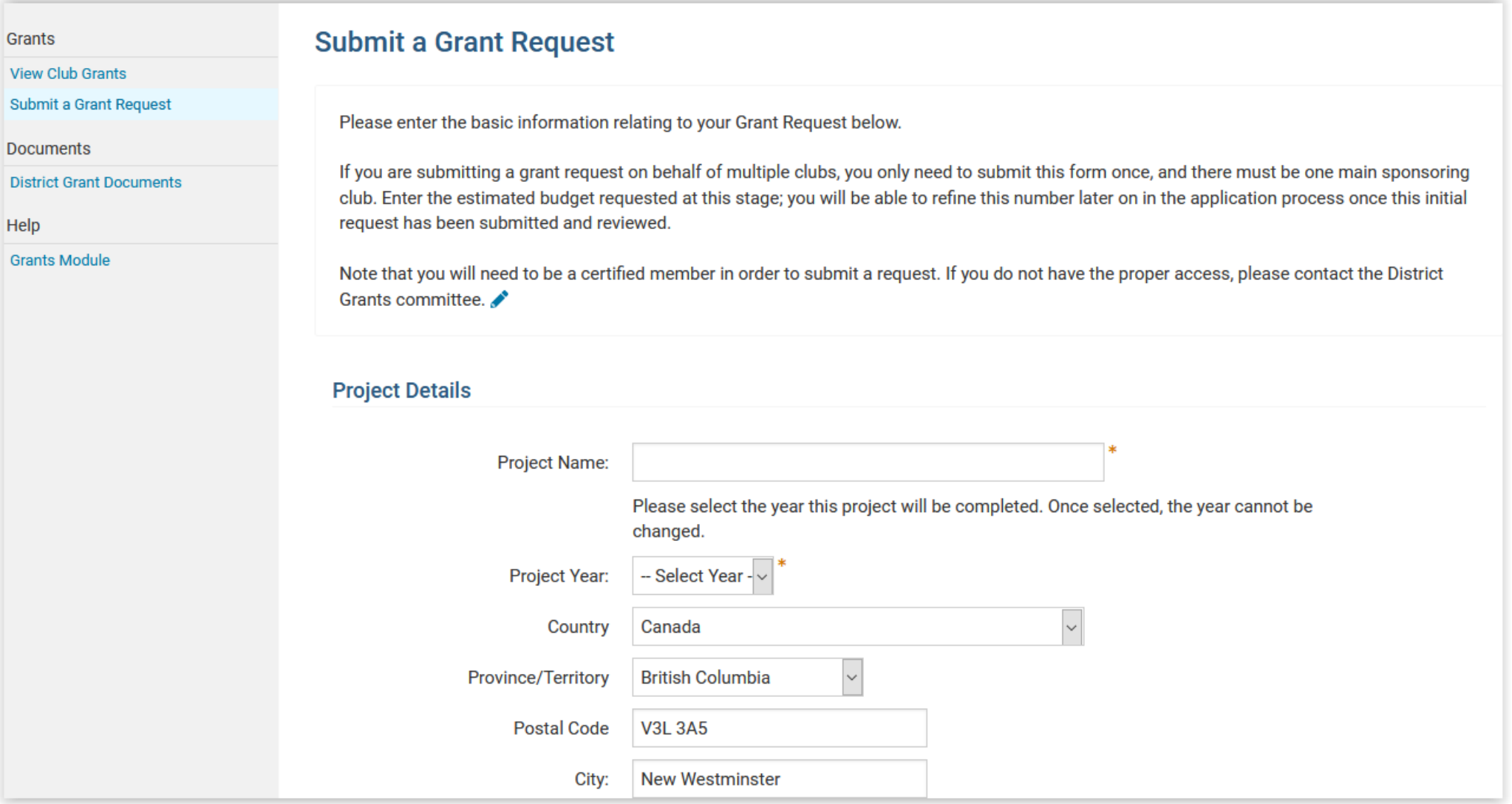


Step 1. Starting a District Grant

Your club must have a signed MOU and you must have taken this session in order for the system to allow you to enter a grant

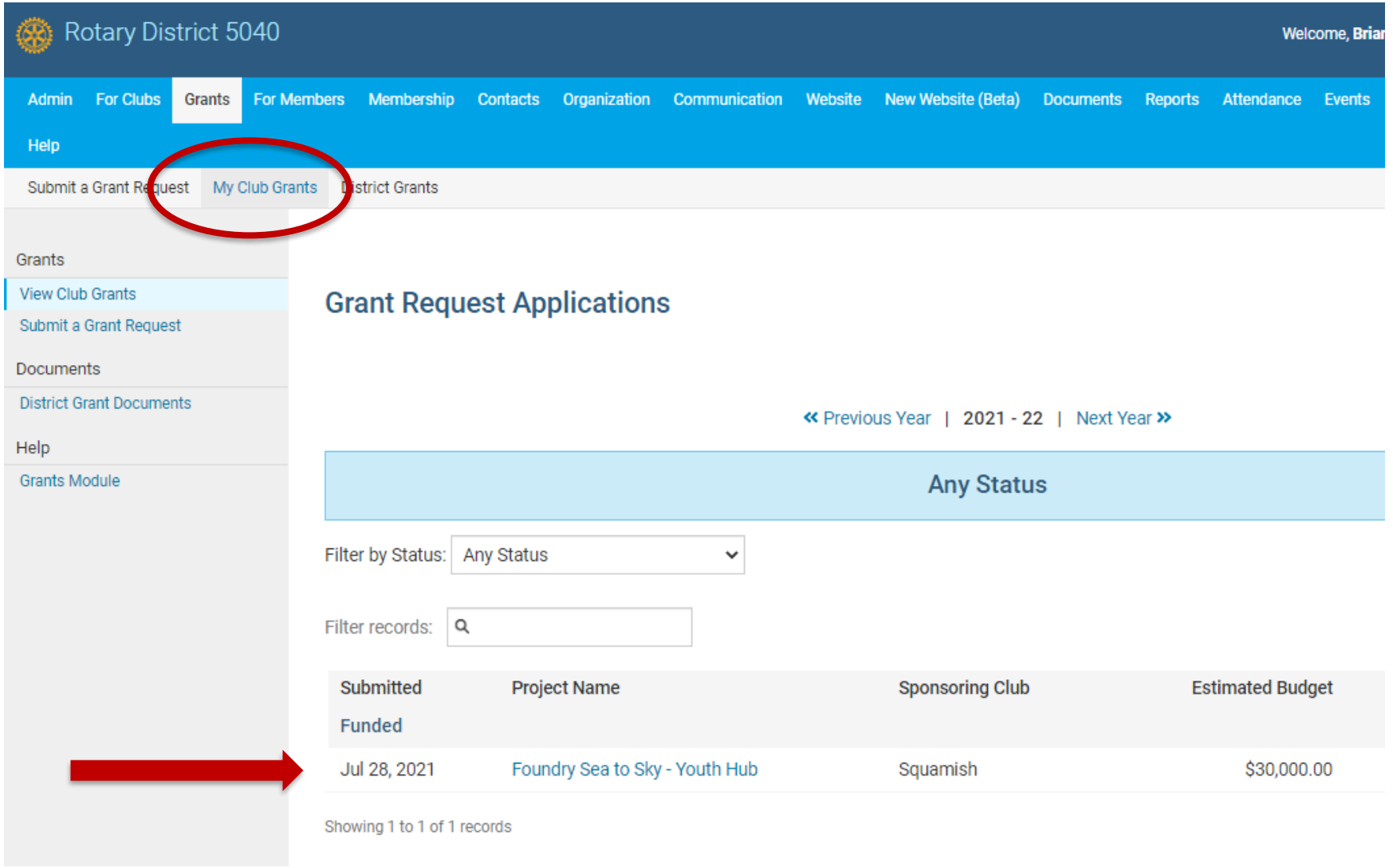
At this stage you enter

- Project name & brief description
- Location
- Budget



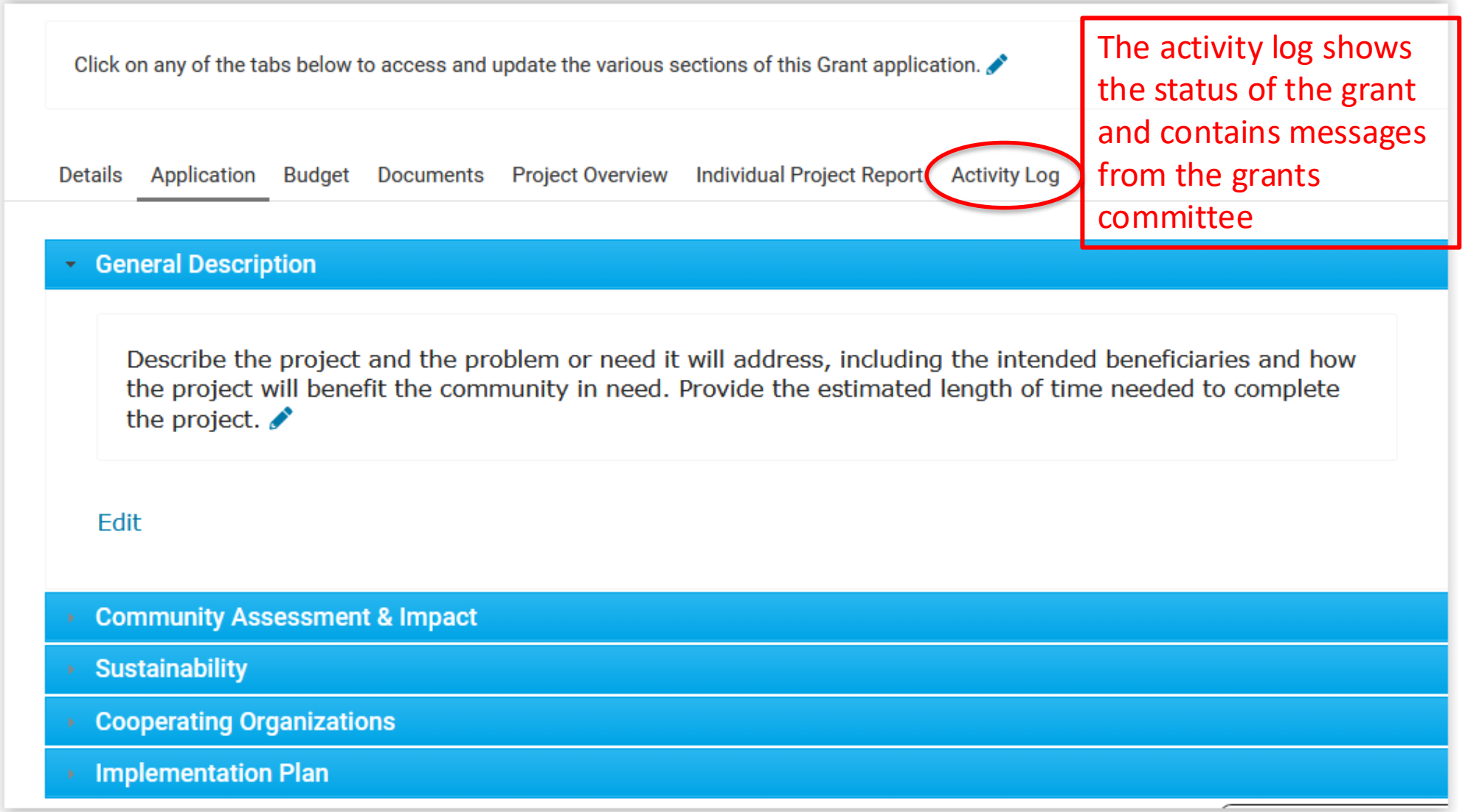
Step 2. Entering Information for a District Grant

If your initial grant request meets overall guidelines you will receive a request for more information message.



Step 2. Entering Information for a District Grant

Opening your grant will give you this page where you fill in the project details. The tabs allow you to enter the budget, store documents and do a final report of how the project went.

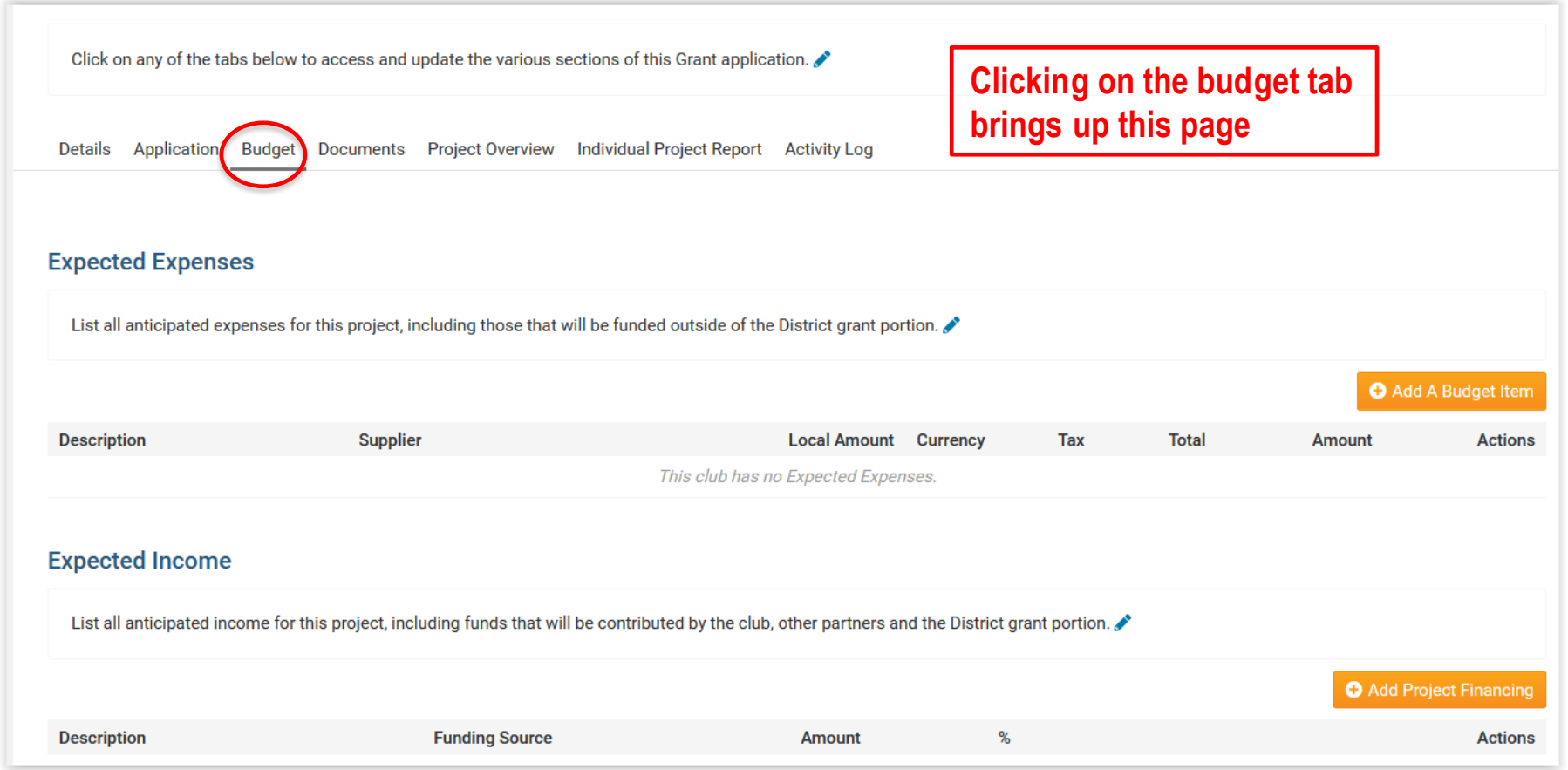


The activity log shows the status of the grant and contains messages from the grants committee

Entering the Project Budget

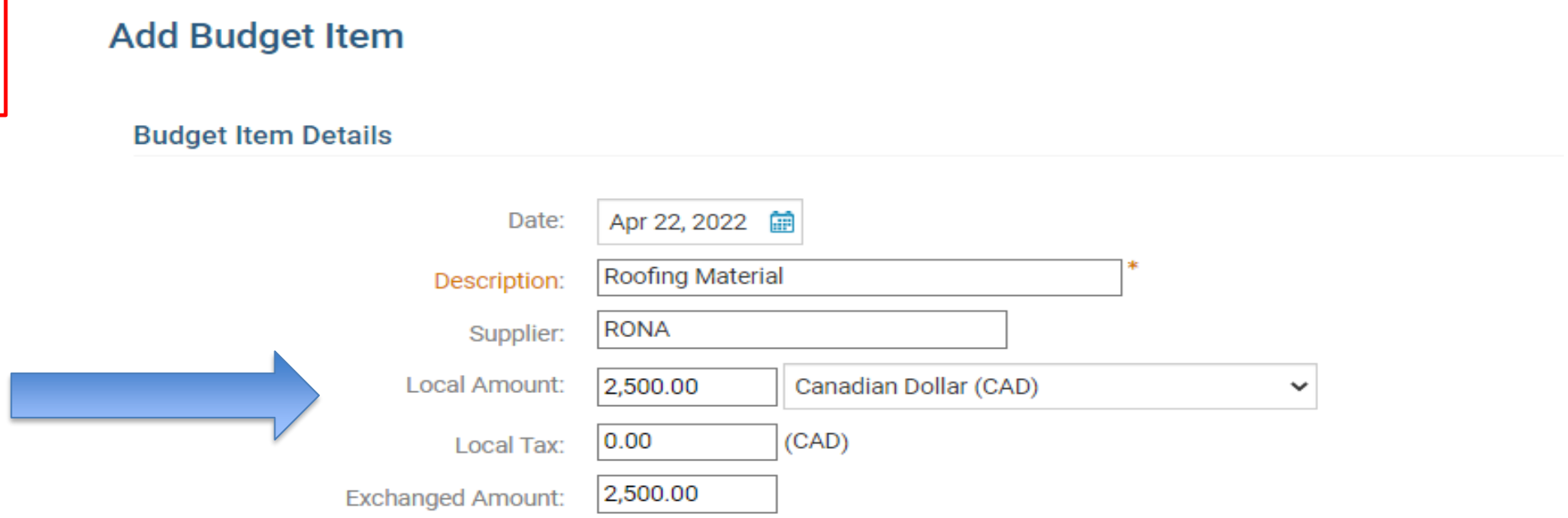
Enter each expense item

Enter all sources of income, club generated funds, partner funding. This is also where you enter your grant request amount

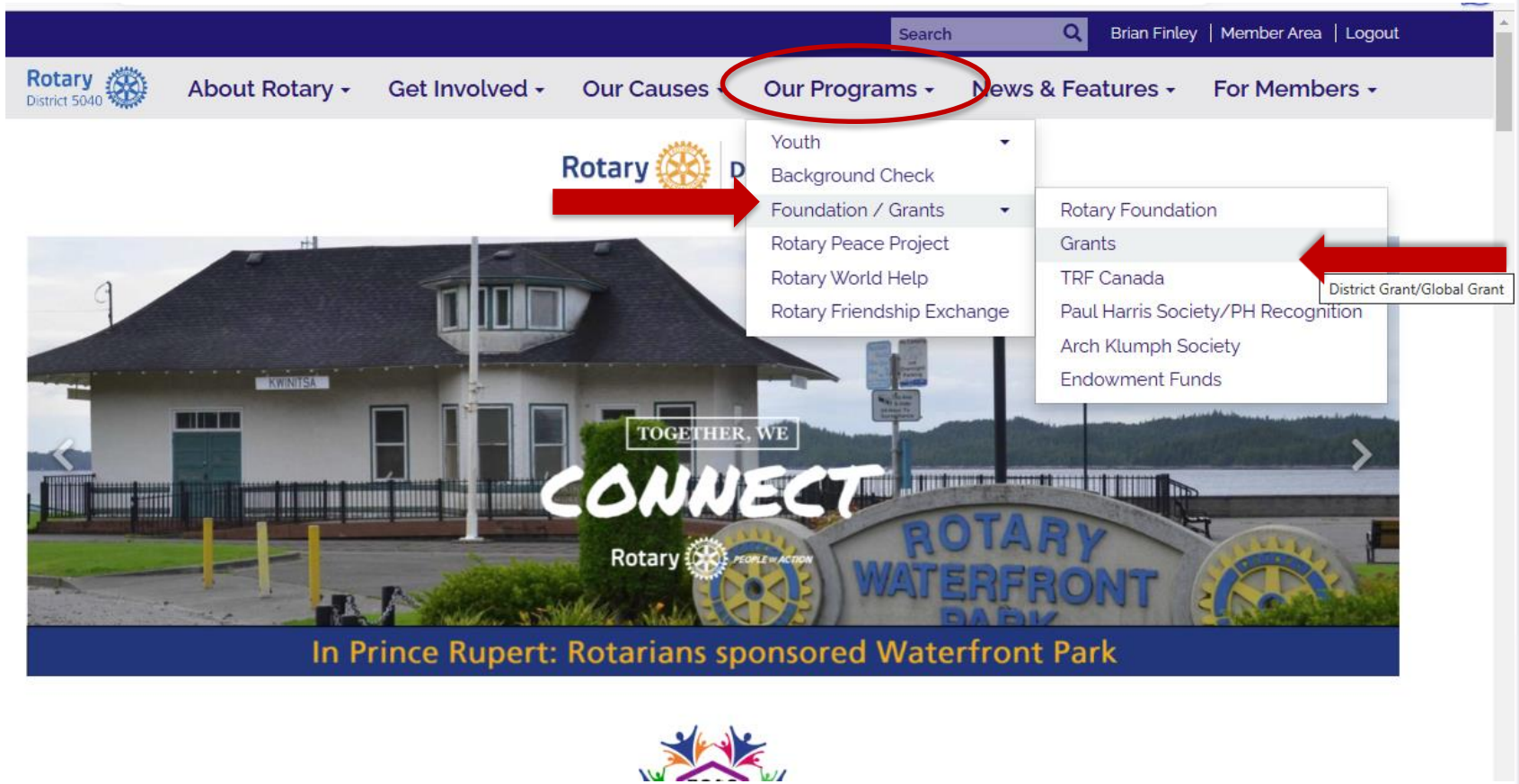


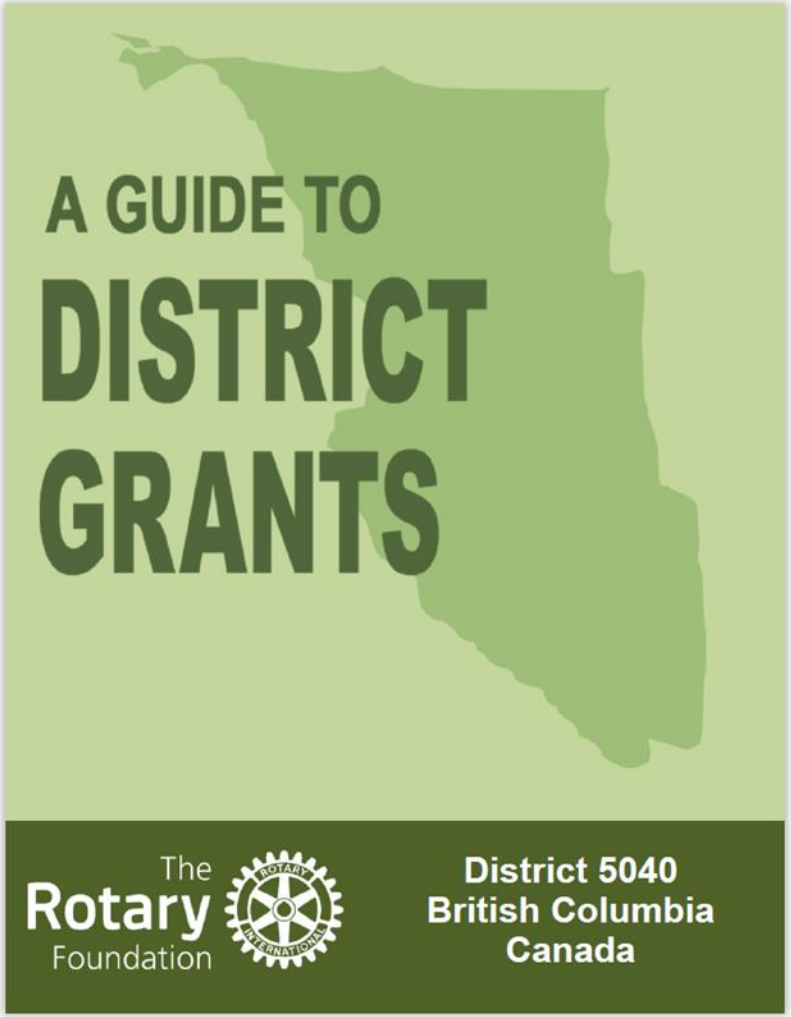
Use Canadian Dollars for all items entered

The system default is $US. Enter and track all funds in Canadian dollars.



Finding Information on Grants





District GRANTS Committee Review - T&Cs District Grants

District Grants CAN NOT be used to fund:

1. **Continuous or excessive support of any one beneficiary, entity, or community**
2. **The establishment of a foundation, permanent trust, or long-term interest-bearing account.**
3. **The purchase of land or buildings**
4. **Fundraising activities**
5. **Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities**
6. **Public relations initiatives, unless they are essential to carrying out the project**
7. **Project signage that cost more than $1,000**
8. **The operating, administrative, or indirect program expenses of another organization**
9. **Rotary Youth Exchange*, RYLA*, Scholarships***

**D5040 exceptions to Rotary Foundation T&Cs*

District GRANTS Committee Review

District grant requests will be processed in the order they are received.

Early submission does not guarantee receiving a grant.

The committee considers the following criteria:

- Does the project meet all District Grant Guidelines?
- Has the club contributed to the Foundation annual fund in the past 3 years?
- Multiple grant applications must be ranked.
- Does the club have any outstanding projects (no final report)?
- The impact and sustainability of the project.
- Has the club received a grant in the past year?

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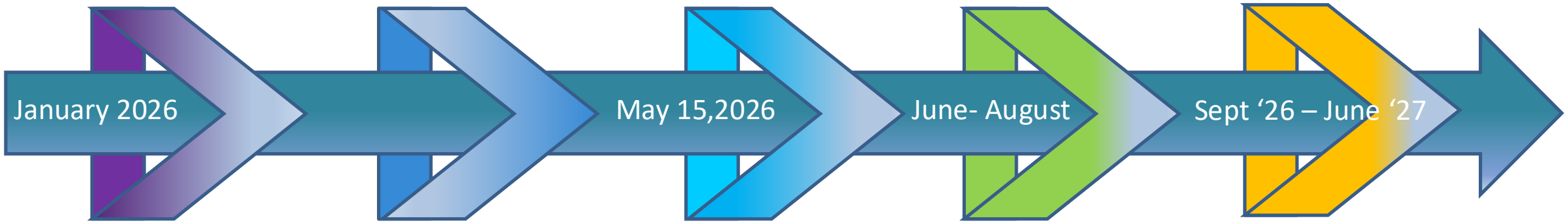
District 5040 Grants Timeline for 2026-2027



- District grants training
- Applications open
- MOU's signed
- Clubs qualified

- Clubs submit
- grant
- applications

- District grant applications close
- Deadline May 15th

- Approved projects are submitted in spending plan to TRF
- FINAL REPORTS for 2025-26
- Funds received from TRF and 1st payment is distributed

- Projects are completed
- Final reports are filed and final payment is distributed

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KEY Messages – District Grants

- **District Grants can help fund your projects and increase the impact in your communities.**
- **Plan your projects and submit your applications ASAP.**
- **The best projects engage club members, have a high impact are visible, and are sustainable.**

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Discussion & Questions