Guidelines for District Grants (D5440 - updated Mar 2024)

I. What we fund
- Local community and international projects
- Humanitarian projects with Rotarian involvement
- Well defined projects with a specific budget and measureable results
- The district will match district 5440 clubs' funds 2 to 1 for eligible expenses up to the amount that a club is eligible for as stated in the District Grant Policy posted on the district 5440 website

II. Eligibility guidelines
- Clubs must be qualified by attending the grant qualification training either at PETS or online
- Clubs must enter annual fund goals on Rotary Club Central for the Rotary year of the grant they are requesting to be eligible for any grants.
- Clubs must meet the per capita contribution amount to The Rotary Foundation as stated in the District Grant policy posted on the district web site at https://www.rotary5440.org/sitepage/grants to be eligible for grants.
- Clubs must not have any overdue grant reports
- Clubs must not have any grants open that are more than two years old

III. Restrictions
- All of the restrictions contained in the Rotary Foundation Terms and Conditions
- Travel expenses are not funded
- The maximum allowed for grants projects that are a repeat of the past year is $1,000. When grant funds are limited, repeat projects may not be approved. If a year is skipped or the grant is significantly different, then the $1,000 limitation does not apply.
- When a single project is part of a larger project the single project must be well defined with it's own budget and measurable results.
- Recurring expenses such as salaries, maintenance, etc.
- Events are not funded
- Awards and prizes are not funded
- Meals, lodging or entertainment are not funded. If they are part of a project that is approved they must be covered by funds other than those specified in the project budget.
- District grants cannot be used to fund global grants, but they can be used for separate projects that complement a global grant project.
- District grants may not be used for pure donations to another organization
- District grants may not be used to match funds for projects in other districts

IV. How to apply
- All grant applications are submitted online at www.matchinggrants.org
- The number of grants and maximum amounts are found on the district website
- Applications must be for the correct Rotary year. For example, if you are submitting an application in May or June it must be for the following Rotary year. For applications submitted in December it must be for the current Rotary year.
- When submitting a project, the amount in the club contribution box should include all contributions other than the district DDF contribution.

- Use the Financing section of the application to break down the contributions from each club. The amount from outside sources of funding that are not donated to the Rotary club must be shown on a separate line indicating the club that is sponsoring the project and should not indicate any DDF contribution on this line.
- Applications must be signed by the person submitting the application and the club president

V. Budget
- Items over $500 must be listed as a separate item
- It is highly recommended to get a quote for items over $1,000
- The budget can include a contingency of up to 10% and up to 3% administrative expenses which can be used to publicize the project.
- The budget cannot contain travel expenses
- The budget cannot contain expenses that already have been incurred.

VI. Payments
- Checks will only be made out to a Rotary club and sent to the official club address which must be entered into the application
- Payments will be made after all of the requirements listed in the History Log after the grants committee review have been met

VII. Changing project after it is approved
- Changes to the project, other than minor details, need to be approved prior to implementation. This is done by adding an addendum to the project description on the matchinggrants.org website
- Approval by the grants committee of this addendum must be in the History Log of the project before the modification is implemented.

VIII. Returning funds to the district
- Clubs must return any funds to the district that were not used in accordance with the budget submitted with the application or as described in an amendment to the project approved by the grants committee.
- Clubs must return to the district any unused funds of $100 or more.
- Clubs must return to the district any district funds that were not matched by at least 50% by the sum of all district 5440 club contributions.
- Clubs must return to the district all grant funds paid for a project that is not completed and a final report filed within two years after approval of the project from the district.

IX. Financial records
- Receipts or an invoice with corresponding payment record or check must be maintained for all financial transactions.
- A separate bank account is recommended if there will be a lot of transactions. Whether or not there is a separate account, all bank records related to grant expenditures must be retained for five years.

X. Reporting
- Quarterly status updates that include the estimated completion date of the project using the matchinggrants.org History Log feature must be posted until the final report is filed.
- The final report is due 30 days after completion of the project or no later than two years after the grant was approved.

- Receipts and invoices with corresponding payment record must be clearly marked to be associated with a line item in the expenses.
- Bank records must be made available if requested by the audit committee.

XI. Project Follow up
- Clubs need to follow up on projects that have been completed around one year after completion to make sure that the project is being properly maintained.