

# GRANT TRAINING

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Use District Grant funds to support  
you club service projects.

## GOAL:

Learn the process for District  
Grants and its stewardship.

# OBJECTIVES

1. Learn how your club can qualify for District Grants.
  - Requirements
  - Certification
2. Learn what information is needed for District Grant application.
3. Learn what information is needed to complete District Grant report.
4. Understand District Grant timeline.

# OBJECTIVE #1

LEARN HOW YOUR CLUB CAN QUALIFY FOR  
DISTRICT GRANTS

# CLUB REQUIREMENTS FOR DISTRICT GRANT

1. RY26-27 Club President attended PETS
2. RY26-27 Club Foundation goals for Annual Fund and Polio Plus entered in Rotary Club Central
3. RY26-27 Club Foundation Chair entered in myRotary
4. RY25-26 Final Grant Project Report completed in Grants module
5. Club has 3-year contribution history to Rotary Foundation

# CLUB CERTIFICATION FOR DISTRICT GRANT

1. RY26-27 Club President & Foundation Chair must submit Learning Center training certificates.
  - The Power of Giving (15 minutes)
  - Foundation Basics (45 minutes)
2. RY26-27 Club President & Foundation Chair must sign Memo of Understanding (electronic process).

Note: Any club member certified withing the last 2 years can submit Grant applications.

# OBJECTIVE #2

LEARN WHAT INFORMATION IS NEEDED FOR  
DISTRICT GRANT APPLICATION

# DISTRICT GRANT FUNDING

## Eligible activities for spending request examples:

1. Local or international service projects and related travel
2. Scholarships for any educational level
3. RYLA, Rotaract, or Interact programs
4. Construction and renovation

## Ineligible activities for spending request examples:

1. Fundraising activities
2. Expenses that are incurred, or activities that are in progress or already completed, before the grant is approved
3. Purchases of land or buildings
4. Project signage that costs more than US\$1,000
5. The operating, administrative, or indirect program expenses of another organization
6. Unrestricted cash donations to a person or cooperating organization

Note: District Grant terms and conditions can be found on the District Website under Foundation/Grants/District Grants.

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## Submit a Grant Request

Please enter the basic information relating to your Grant Request below. Include the Priority (1, 2, 3) in the Project Name and the Area of Focus with the Project Date in the Description.

Areas of Focus: (1) Peacebuilding & Conflict Prevention (2) Disease Prevention & Treatment (3) Water, Sanitation, & Hygiene (4) Maternal & Child Health (5) Basic Education & Literacy (6) Community Economic Development (7) Environment

If you are submitting a grant request on behalf of multiple clubs, you only need to submit this form once, and there must be one main sponsoring club. Enter the estimated budget requested at this stage; you will be able to refine this number later on in the application process once this initial request has been submitted and reviewed.

Note that you will need to be a certified member in order to submit a request. If you do not have the proper access, please contact the District Grants committee.

# PROJECT DETAILS

## Project Details

**Project Name:\***

Please select the year this project will be completed. Once selected, the year cannot be changed.

**Project Year:\*** -- Select Year ▾

**Country:** United States of America ▾

**State:** Texas ▾

**Zip Code:** 78248

**City:** San Antonio

**Description:\***

**Estimated Budget:**

Project Name should include:

1. Name of Project
2. Priority # (if multiple applications are submitted)

Description should include:

1. Area of Focus
2. Date of Project

# PROJECT DETAILS - EXAMPLE

Project Name:\*

Country

State

Zip Code

City:

Description:\*

Sponsoring Club:

# INFORMATION TABS - ALL

Click on any of the tabs below to access and update the various sections of this Grant application. 

[Details](#) [Application](#) [Budget](#) [Documents](#) [Project Overview](#) [Individual Project Report](#) [Activity Log](#)

## 1. District Grant Application Tabs

- Details
- Application
- Budget
- Project Overview

## 2. District Grant Closure Tabs

- Documents
- Individual Project Report

# INFORMATION TABS - APPLICATION

- 1. General Description:** Describe the project and the problem or need it will address, including the intended beneficiaries and how the project will benefit the community in need. Provide the estimated length of time needed to complete the project.
- 2. Community Assessment & Impact:** Describe how the benefiting community has been determined and what impact will be made by this project after grant funding has been fully expended.
- 3. Sustainability:** Please explain the plan for maintaining this project for a long period of time.
- 4. Cooperating Organizations:** List any cooperating organization(s)
- 5. Implementation Plan:** Describe specific activities of the sponsoring club and any partners in implementing the project. What will the Rotarians who are members of the sponsoring club and any partner clubs do during the project? Please note that financial support is not considered active involvement.

# INFORMATION TABS - BUDGET

## 1. Expected Expenses:

- Description
- Supplier
- Amount

## 2. Expected Income:

- Description
- Funding Source
- Amount

District Grant request cannot exceed \$2,500 and must include a Club matching fund commitment. For example, District Grant request is \$1,000 with Club matching \$1,000 for a total of \$2,000 to support the service project.

# INFORMATION TABS – PROJECT OVERVIEW

Information feeds over from previous tabs.

# OBJECTIVE #2

LEARN WHAT INFORMATION IS NEEDED TO  
COMPLETE DISTRICT GRANT REPORT

# INFORMATION TABS - DOCUMENTS

Place to upload receipts from spending as part of the final project report.

1. Invoices/Quotes
2. Receipts from Supplier Purchases
3. Project Pictures

## Receipts

*Documents and folders are sequenced alphabetically. Your access level does not allow you to modify documents.*

↳ Collapse All Expand All

Name

- ⋮ Bill Miller Receipts for Meals
- ⋮ Bountiful Blessings 2024 Word Puzzle Book Gifts
- ⋮ Fellowship Hall Receipt
- ⋮ Fellowship Hall Receipt

↳ Collapse All Expand All

Note: District Foundation Stewardship committee will review expenses and receipts to ensure District Grant funds were spent accordingly.

# INFORMATION TABS – INDIVIDUAL PROJECT REPORT

1. Describe the project. What was done, when, and where did the project activities take place?
2. How many people benefited from this project?
3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?
4. How many Rotarians participated in this project?
5. What did they do? Please give at least two examples, not including financial support provided to the project.
6. If a cooperating organization was involved, what was its role?

# INFORMATION TABS – INDIVIDUAL PROJECT REPORT (FINANCIAL)

## 1. Income:

- Date
- Description
- Funding Source
- Amount
- Percentage

### Financial Report

All sources of income. Add income items as needed.

Date	Description	Funding Source	Amount	%
Aug 01, 2024	Club Monies from fundraising and projects	Club/Other	(\$1,897.64)	71.67%
Feb 10, 2025	Grant Monies From our District	District Grant	(\$750.00)	28.33%
<b>Total:</b>			<b>\$2,647.64</b>	<b>100.00%</b>

## 2. Expenses:

- Description
- Supplier
- Amount

All expense items. Please be specific and add lines as needed.

Description	Supplier	Local Amount	Currency	Tax	Total	Amount
Holiday Dinners	Bill Miller BBQ	\$2,086.04	USD	\$0.00	\$2,086.04	\$2,086.04
Puzzles, Books, Crossword Books	Walmart, Dollar General	\$311.60	USD	\$0.00	\$311.60	\$311.60
Fellow Hall Receipt	St. John's Catholic Church	\$250.00	USD	\$0.00	\$250.00	\$250.00
<b>Total:</b>					<b>\$2,647.64</b>	<b>\$2,647.64</b>

# OBJECTIVE #2

UNDERSTAND DISTRICT GRANT TIMELINE

# DISTRICT GRANT TIMELINE

## **JUNE 30, 2026**

1. Certification for RY26-27 President and Foundation Chair
2. District Grant Applications

## **AS SOON AS PROJECT HAS BEEN COMPLETED**

1. District Grant Project Report
2. Upload spending receipts

**QUESTIONS**

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