

## **ROTARY DISTRICT 9910 - DISTRICT GRANTS PACK 2025-2026**

This document details the district grants available to Rotary Clubs in District 9910 for the 2025-2026 Rotary year and provides all the forms required for your 2025-2026 district grant application.

Your club will need to be aware of the following background and processes and complete forms as below:

### **BACKGROUND TERMS AND CONDITIONS AND DECIDING ON A PROJECT:**

Pages 2-4

**FORM 1** -Completing a Memorandum of Understanding (MOU)

Pages 5-7

**Due before the closing date of 30 September 2025**

**FORM 2** Completing a Grant application form.

Pages 8-9

**Closing date is 30 September 2025**

**ADVISING THE DISTRICT STEWARDSHIP CHAIR OF YOUR PROJECT BANK ACCOUNT.** Page 10

**FORM 3** Completing a Project Final Completion Report.

Pages 11-12

**Closing date 1 August 2026**

**Please be aware that all your forms - MOU, Grant application form and Project Final Completion report should all be emailed to: Roy Dykes, Chairman District Grants committee**

**Email: [roy@dykes.co.nz](mailto:roy@dykes.co.nz)**

## Background terms and conditions and deciding on a project:

The objective of a **Rotary Foundation District Grant** is to enable Clubs to support the Rotary Foundation's mission; *(enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty)* by supporting clubs to carry out a small project which will address **an immediate need that has been identified in their local community, or overseas**.

**This year District 9910 has as its main objective for District Grants to strengthen Rotary's profile in the club's local community through the funding of a local project.**

District Grants are funded by the Rotary Foundation and will generally match Club contributions at 100% ("dollar for dollar").

District 9910 will have available up to NZ\$33,000 (22 x \$1500 grants) for distribution as District Grants in the 2025/26 Rotary year.

## Qualification Criteria

Clubs must be qualified to receive District Grants. Requirements for qualification are:

1. A Club representative must have attended a Rotary Foundation seminar, or have completed the Rotary Online Grant Management Seminar, or be an active member of the District Rotary Foundation Committee
2. Clubs must have contributed to the Foundation Annual Fund at least once over the past three years
3. Clubs must have entered their Rotary Foundation goals on [www.rotary.org](http://www.rotary.org)
4. All Rotary International and District dues must be paid up to date

NB Qualification is required for each Rotary year

## District Grant Guidelines

- Clubs applying for a grant must have a signed MOU with the District and be qualified
- The project budget must show how the project is to be fully funded
- Clubs will generally match any grant application request \$ for \$ up to \$1500
- A clear audit trail **MUST** be maintained for all grants. Receipts for goods and services must be retained for submission with the project completion report.
- Applicants will be notified of their successful application as soon as possible after the closing date (30 September 2025), as will all declined applications.
- Clubs requiring more information before lodging an application should contact a member of the Grants Committee, who will be happy to help or advise.
- Projects must not commence prior to the receipt of grant funds awarded.
- District Grant projects must be completed within the current Rotary year (before 30 June 2026).

## **Project Selection Criteria**

1. The project should be seen and promoted as a Rotary project with **the objective of increasing the profile of your club within your community**. The grant may not be used to partially fund a project which is not 100% identifiable as a Rotary project.
2. The project should, wherever possible, involve the active participation of Club members.
3. The Club should have effective control of the funds and arrange purchase of equipment and services.
4. Project funds should not simply be handed over to another/alternative charitable (fundraising) organization.
5. Grants will be allocated to new specific projects rather than to support an existing on-going programme.
6. Grants are not to be used for excessive support of any one beneficiary.
7. Projects should be sustainable and able to continue independently without the on-going support of the Rotary Foundation.
8. Portable electronic devices will not be considered.
9. Grants must produce a tangible asset and may not be used to fund events.
10. Only one grant per Club will be made unless the total of all applications is undersubscribed. If a club wishes to submit 2 applications these applications should be ranked in priority by the Club.

### **Please note the following:**

- Receipts for goods and services (and in the name of the sponsoring club) must be retained for submission with the final project completion report.
- Rotary logos should always be displayed on the project.

## **Deciding on a project**

**Your club will need to spend time ensuring that your project fits within the above criteria and complete the required Memorandum of Understanding and application forms.**

**Refer below**

## **The following are examples of previously approved District Grants**

Portable Lower Abdominal Scanner  
Waterfall Track Project  
Special Equipment for Special Needs School  
Replacement Mini Van for De Paul House  
Solar Ice Making Equipment – Vanuatu  
Farm Water project – Noumea  
Fitness Equipment for at risk children  
Projector for Hospice  
Shade umbrella for Hospice  
Rebuilding a school garden  
School Bike storage facility  
Community events noticeboard  
Purchase of van for Kiwi Harvest to establish KH on the North Shore  
Community Pétanque court  
Schools Dictionary Project  
Sound System  
Chiller  
Trees for Survival  
Purchase of Seabin  
Atlas programme  
School Desks  
Equipment for Tongan Disabilities centre  
Water fountain for kindergarten  
BBQ Tabletops  
Resuscitation equipment  
Kea Club uniforms  
Garden Tunnel house for school  
Emergency Housing equipment  
Rainwater Harvest Project in Vanuatu  
Gardens for new housing subdivision  
Security fencing, new seating etc for primary school  
Far North vulnerable family project  
Exercise equipment for transition centre  
Dictionaries and Duffy books for low decile school  
Trailer for housing BBQ and Games Equipment  
Defibrillator for public use  
Hospital equipment for Maternity and Special Care Unit  
Upgrade wood technology workshop  
Centennial tree planting  
Generator for Community Hub  
Dictionary distribution for Fiji Schools

**To be completed before application is made**

**FORM 1: MEMORANDUM OF UNDERSTANDING 2025-2026**

*Rotary Club of \_\_\_\_\_,*

**1. Club Qualification**

To participate in Rotary Foundation District 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 training offered on Rotary Foundation Grants.

In addition, the Club must be up to date with all financial commitments to the District and Rotary International. These include RI Club Invoices and annual District Dues.

By completing these requirements, the Club becomes qualified and eligible to participate in the TRF grant program.

- 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**

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

**3. Financial Management Plan**

The Club must have a written financial management plan to provide consistent administration of grant funds. The financial management plan must include procedures to:

- a. Maintain a standard set of accounts, which includes a complete record of all receipts and disbursements of grant funds
- b. Disburse grant funds, as appropriate
- c. Maintain segregation of duties for handling funds
- d. Establish an inventory system for equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities
- e. Ensure that all grant activities, including the conversion of funds, comply with local law

#### **4. Bank Account Requirements**

**In order to receive District Grant funds, the club must bank the funds directly into its Charitable Trust Bank Account.**

- a. The bank account must
  - i. Have a minimum of two Rotarian signatories from the club for disbursements
  - ii. Be a low- or noninterest-bearing account
- b. Any interest earned on grant funds must be documented and used for eligible, approved grant activities, or returned to TRF.
- c. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.
- d. Bank statements must be available to support receipts and the use of TRF grant funds.
- e. The Club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.

#### **5. Report on Use of Grant Funds**

The Club must adhere to all TRF reporting requirements. Grant reporting is a key aspect of grant management and stewardship, as it informs TRF of the grant's progress and how funds are spent.

#### **6. Document Retention**

The Club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification and TRF grants. Retaining these documents supports transparency in grant management and assists in the preparation for audits or financial assessments.

- a. Documents that must be maintained include, but are not limited to:
  - i. Bank information, including copies of past statements
  - ii. Club qualification documents including a copy of the signed club MOU
  - iii. Documented plans and procedures, including:
    - a) Financial management plan
    - b) Procedure for storing documents and archives
    - c) Succession plan for bank account signatories and retention of information and documentation
    - d) Information related to grants, including receipts and invoices for all purchases

- b. Club records must be accessible and available to Rotarians in the Club and at the request of District.
- c. Documents must be maintained for a minimum of seven years, as required by local law.

## 7. Reporting Misuse of Grant Funds

The Club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the Club that does not tolerate the misuse of grant funds.

## Authorization and Agreement

*This Memorandum of Understanding is an agreement between the Club and the District and acknowledges that the Club will undertake measures to ensure the proper implementation of grant activities and proper management of Foundation grant funds. By authorizing this document, the club agrees to comply with all of the conditions and requirements of the MOU.*

*On behalf of the Rotary Club of \_\_\_\_\_, we the undersigned agree to comply with all of the conditions and requirements of the MOU for Rotary year 2025-2026 and will notify Rotary International District 9910 of any changes or revisions to club policies and procedures related to these requirements.*

| <b>Club President</b> |
|-----------------------|
| <b>2025 -26</b>       |
| <b>Name:</b>          |
| <b>Signature:</b>     |
| <b>Date:</b>          |

Email

| <b>Club President - Elect or<br/>Rotary Foundation Chair</b> |
|--|
| <b>2025 -26</b>  |
| <b>Name:</b>   |
| <b>Signature:</b>  |
| <b>Date:</b>   |

Email

**Please email a scanned copy to Roy Dykes at [roy@dykes.co.nz](mailto:roy@dykes.co.nz)**

**FORM 2: DISTRICT GRANT APPLICATION FORM 2025-2026**

**Applicant Club Name** \_\_\_\_\_

**Project Details**

|  |                          |
|--|--------------------------|
| <b>Name of Project:</b>  |                          |
| <b>Project Start Date:</b>   | <b>Project End Date:</b> |
| <b>State the purpose of this project:</b>  |                          |
| <b>How will this project meet the needs of the community:</b>                      |                          |
| <b>List any co-operating organisations: (attach copy of letter of endorsement)</b> |                          |



### Budget

| Item to be purchased | Supplier     | Cost (NZ\$) |
|----------------------|--------------|-------------|
|                      |              |             |
|                      |              |             |
|                      |              |             |
|                      |              |             |
|                      | <b>Total</b> |             |

### Financing

| Rotary Club/District/Co-Operating Organisation | Contribution (NZ\$) |
|--|---------------------|
|  |                     |
|  |                     |
|  |                     |
| <b>Total TRF District Grant applied for</b>    |                     |
| <b>Total</b>                                   |                     |

Note: You are required to account for the spending (including receipt(s)) of the monies and provide a project report and expenditure report on the project at its completion.

Signed \_\_\_\_\_

Name \_\_\_\_\_

President, Rotary Club of \_\_\_\_\_

Date \_\_\_\_\_

## **Application of Funds by The District Grants Committee to TRF Australia**

Once the District Grant project has been approved, the funds will be applied for from TRF in Australia.

When these are received the club will be notified by the district grants committee and the club should request payment of the funds from the District 9910 TRF Stewardship Chair Keith Day (email [krday@outlook.com](mailto:krday@outlook.com) ph 0274755566) providing him with details of your bank account to enable the funds to be deposited directly into the club's project account.

## **Final Reporting**

Once the project is completed, the Club must complete a two-page report about the project (with photos) including financial receipts for goods and services which must be sent to District 9910 TRF District Grants Sub Committee Chair **by 1st August 2026**.

For further information contact:

**Roy Dykes – District Grants Sub Committee Chair 2025-26**  
- Email: [roy@dykes.co.nz](mailto:roy@dykes.co.nz)  
- Ph: 0274 867002

## FORM 3: Project Final Completion Report 2025-2026

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Rotary Club: \_\_\_\_\_  
Project Title: \_\_\_\_\_  
Progress report ☐ Final ☐

### Project Description

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1. Describe the project. What was done, when, and where did project activities take place? If this is a progress report, what remains to be done?
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 the 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?

### **Financial Report** (District must retain receipts of all expenditures for at least five years)

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Currency      \$NZ      Exchange      N/A      = 1 USD

#### 7. Income

| Sources of Income                                  |  | Amount |
|--|--|--------|
| 1. District Grant funds received from the District |  |        |
| 2. Club funds                                      |  |        |
| 2. Other funding (specify)                         |  |        |
| Total Project Income                               |  |        |

8. Expenditures (please be specific and add lines as needed)

| Budget Items               | Name of Supplier |  | Amount |
|----------------------------|------------------|--|--------|
| 1.                         |                  |  |        |
| 2.                         |                  |  |        |
| 3.                         |                  |  |        |
| 4.                         |                  |  |        |
| 5.                         |                  |  |        |
| Total Project Expenditures |                  |  |        |

**Certifying Signature**

By signing this report, I confirm that to the best of my knowledge these District Simplified Grant funds were spent only for eligible items in accordance with Trustee-approved guidelines, and that all of the information contained herein is true and accurate. I also understand that all photographs submitted in connection with this report will become the property of RI and will not be returned. I warrant that I own all rights in the photographs, including copyright, and hereby grant RI and TRF a royalty free irrevocable license to use the photographs now or at any time in the future, throughout the world in any manner it so chooses and in any medium now known or later developed. This includes the right to modify the photograph(s) as necessary in RI's sole discretion. This also includes, without limitation, use on or in the web sites, magazines, brochures, pamphlets, exhibitions and any other promotional materials of RI and TRF.

Club

\_\_\_\_\_

Certifying Signature

Date:

Print name,

\_\_\_\_\_

Rotary title,

\_\_\_\_\_

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