

DISTRICT 9800 GRANT PROJECT ELIGIBILITY CHECKLIST

The table below outlines the key Foundation and District 9800 requirements for District Grant projects. The information is designed to assist clubs in assessing whether proposed projects are eligible for District Grant funding at both the application and reporting stages. This table is intended as a decision-support tool only; it does not cover all District Grant requirements and does not replace the District Grant Terms and Conditions.

Clubs are encouraged to be familiar with the Eligible Activities and Ineligible Activities and Spending sections of the Terms and Conditions.

LINKS

[District 9800 Foundation website](#)

[TRF District Grants Terms and Conditions](#)

Key question	Requirements	Explanation
Has any part of this project already commenced, or have any costs been incurred, orders placed, items delivered, or contracts entered into prior to grant approval?	Projects must be approved by RI staff before they commence, or any incur any expenses.	Clubs must not start a project, place orders, sign contracts, or pay invoices until the grant has been formally approved by the District Foundation Committee Any expenses incurred before approval are not eligible for reimbursement.
Are Rotarians actively involved in the leadership and delivery of this project, rather than merely providing funding for another organisation to implement it?	Projects must have active participation by Rotary Members	Foundation funds must be used for Rotary-led projects. Rotarians must be actively involved in planning and delivering the project, not simply providing funding. District Grant funds cannot be used to pay another organisation to independently run a program on Rotary's behalf.
Does the description clearly identify the specific goods or services that the grant funds will pay for?	Descriptions of projects should clearly state what is being funded.	Project descriptions must clearly state exactly what items or services the grant funds will pay for. Vague descriptions can delay approvals or result in requests for clarification.
Is this funding supporting a specific Rotary-led project, or is it being used to cover the routine operating costs of another organisation?	Operating expenses of another organisation.	District Grants support Rotary service projects, not the ongoing operating costs of other organisations. Expenses such as rent, utilities, salaries, or general administration are not eligible, as they fund an organisation's operations rather than a specific Rotary-led project.

Key question	Requirements	Explanation
<p>Could the recipient use this money or voucher for something outside the approved purpose?</p>	<p>Unrestricted cash donations</p>	<p>District Grant funds must not be provided as unrestricted cash or cash equivalents, as these cannot be adequately controlled. Cash equivalents include cash, cheques, and general-use gift cards or vouchers.</p> <p>Funds may only be provided when they are restricted to a specific, approved purpose. Vouchers limited to a specific item or store (e.g. a bookstore voucher for books) may be acceptable. General-use gift cards (e.g. Amazon) are not.</p>
<p>Is any part of this project intended to raise funds, rather than directly deliver a service or outcome to beneficiaries?</p>	<p>Fundraising activities cannot be funded – either for Rotary or other organisations</p>	<p>District Grant funds must be used to directly support service activities. They cannot be used to fund projects whose primary purpose is to raise money, regardless of who the eventual beneficiary is.</p>
<p>Will the club or individual Rotarians receive any benefit from this project?</p>	<p>Clubs or Rotarians cannot benefit from the Foundation funded project.</p>	<p>District Grant funds must benefit people or organisations outside Rotary. Rotary clubs cannot own items purchased with grant funds, and Rotarians cannot be direct beneficiaries.</p> <p>This includes Rotary-branded signs, markers, or items intended primarily for visibility rather than identifying that the project was supported by Rotary and the Rotary Foundation.</p>
<p>Does this project deliver a direct, tangible benefit to beneficiaries, or is its primary purpose awareness-raising, promotion, or visibility?”</p>	<p>Public relations initiatives</p>	<p>District Grant funds must result in a direct benefit to beneficiaries. General awareness, marketing, or promotional activities are not eligible.</p> <p>Promotional items may only be funded where they are incidental and negligible in cost and directly support completion of the project.</p>
<p>Will the Project receive regular publicity within the club, local community, on social media and in Rotary publications.</p>	<p>Clubs are encouraged to promote their projects.</p>	<p>It is important that Clubs promote the great work that Rotary and Rotarians do in the community, both locally and internationally. It is also a requirement that any promotion include the wording “The project is being/was delivered with the support of a Rotary Foundation District Grant”.</p>

EXAMPLES

The Table below lists some examples of projects that are ineligible for funding through a District grant.

Example of ineligible project (key words highlighted)	Reason
Provide funding for ThrivePath Education Services to run a series of education seminars and provide wellness packs to those in need.	Lack of active Rotary involvement
Over the Holiday period the club provided 150 hygiene packs to homeless people. Dictionaries and other books were provided to primary school children as part of their end of year graduations.	Project started before the Grant was approved
For many years the club has supported this project in partnership with the local scout group. Many homeless men will benefit from this partnership.	Vague – unclear what is being funded
Purchase of kayaks for the club to rent out with the proceeds funding community projects.	The club will own the kayaks thus they get the benefit.
Recognizing excellence in education prizes of \$100 and plaques will be given to outstanding educators and students.	Unrestricted cash donation
The 5th edition of the Beauty of Burra calendar in 2026, continuing a 20-year commitment. This fundraiser supports the local Youth Orchestra.	Fundraising activities
Pay the salary for a counselor to provide mental health support for disadvantaged young people.	Operational expenses of another organisation
Purchase T-shirts highlighting the need to speak out against Domestic Violence	Only a public relations initiative

DISTRICT GRANT ELIGIBILITY FAQ

TERMS AND CONDITIONS EXPLAINED

ACTIVITY START DATE

District Grant funds can only be used for activities or projects that begin after the grant has been approved. Any expenses incurred before receiving official approval are not eligible for reimbursement. This ensures that funding supports properly authorized projects and prevents retroactive coverage of costs.

Before any club or district spends money or begins any activities related to a project included in a district grant, the activity must first be formally reviewed and approved. This means that you cannot start work or make purchases for the grant-funded activity until you have received official approval.

Any expenses or costs paid before the activity receives approval are not eligible for reimbursement by the district grant. Only expenses incurred after the project has been approved can be funded.

INVOLVE ACTIVE PARTICIPATION BY ROTARY MEMBERS

What Does “Involve Active Participation by Rotary Members” Mean?

To be eligible for a district grant funding, an activity must actively engage Rotary members. This requires Rotary members to share their abilities, knowledge, and resources in the project or event. Members need to take part directly in planning, executing, or supervising the supported activity.

Their involvement should do more than just offer financial support—it should include hands-on work, leadership roles, or stewardship that reflects Rotary’s principles. Examples include managing service initiatives, guiding scholarship winners, heading vocational training teams, or working closely in youth programs.

The aim is for Rotary members to be clearly and meaningfully involved, rather than simply donating funds.

CONSTRUCTION AND RENOVATION

District grants can be used to support construction and renovation projects, provided these activities are approved in advance and meet eligibility requirements. Because construction projects often involve significant expenses, clubs should carefully weigh these costs against other important community needs before allocating grant funds.

INELIGIBLE ACTIVITIES AND SPENDING

PROMOTING A PARTICULAR POLITICAL OR RELIGIOUS VIEWPOINT

District grant projects can partner with religious organizations to carry out activities, such as holding an event in a church hall or providing meals during Ramadan. However, these projects must ensure that beneficiaries are not limited to a single religious group, and the initiative must not promote or favor any particular religious viewpoint.

Example (**Not Eligible**): “Beef sharing for Muslim brothers & sisters. The club intends to share beef among Muslims during the celebration of Eid Al-Adha.”

This project is not eligible because it restricts participation to Muslims only.

Example (**Eligible**): “The club intends to share beef with anyone attending the celebration of Eid Al-Adha.”

This project is eligible because it welcomes all participants, regardless of their religious affiliation.

FUNDRAISING ACTIVITIES

District grant funds **cannot** be used to raise money for The Rotary Foundation or for any other organisation. This includes providing items for raffles, covering costs for fundraising events, or otherwise supporting activities whose primary purpose is to raise funds.

Example of an ineligible activity (due to fundraising):

“To purchase a marquee to provide facilities on the beach for the annual winter lunge major fundraising event on the winter equinox, and for use at other fundraising events”

This activity is ineligible because the equipment would directly support fundraising activities.

CASH DONATIONS TO INDIVIDUALS OR OTHER ORGANIZATIONS

According to Section 2.T of the District Grant Terms and Conditions, “Unrestricted cash donations to a person or cooperating organization” are not permitted. The term "cash" includes:

- Cash itself, Gift cards, unrestricted vouchers such as fuel or grocery vouchers, pre-paid debit cards

Instead of giving cash, clubs can buy goods to donate or pay directly for services.

ROTARY EVENTS

Typically, district grant funds are not allowed to cover costs for District or club events. However, funding is permitted for the following:

- Rotary Youth Exchange
- RYLA
- Rotary Friendship Exchange
- Rotaract
- Interact programs
- Community needs assessments

Be aware that only expenses directly linked to these specific events can be covered.

PURCHASES OWNED BY ROTARIANS OR ROTARY CLUB

District grants are intended to benefit the community, not Rotary entities. Any items bought with grant funds must be donated, not kept by the club. For instance, clubs cannot buy kayaks for fundraising; they must donate them directly to the community.

OPERATING EXPENSES OF OTHER ORGANIZATIONS

Rotary Grants are not intended to fund another organization's ongoing operations

District grants support **Rotary-led service**, not the routine costs required to run another organisation. Paying expenses such as electricity, rent, salaries, or general administration effectively shifts Rotary into the role of a funder of that organization's operations rather than a partner in a service project.

To avoid creating financial dependency

Recurring costs continue every year. If Rotary pays for a cost once, the expectation may arise that Rotary can or should continue funding it. Grants are meant for **one-time, project-specific investments** that have immediate impact, not ongoing commitments.

Example of an eligible expense: Technology for a Forest Preserve group

A club proposed purchasing technology such as laptops and monitors for a local forest preserve group. The group had recently installed security cameras, and the additional equipment would make the system easier to use.

The rationale for the purchase was that these items were necessary to make the new security camera system fully functional. This improvement would enhance security for a reserve that has experienced vandalism, enabling the group to better achieve its mission of improving the local environment. Importantly, the security system supports this single purpose and is not a generic service used for multiple unrelated activities.

Why this project is eligible

To summarise the reasoning why this was an eligible expense:

This technology represented a **one-time, tangible purchase** that has an **immediate and direct impact** on the safety and accessibility of a community resource.

More specifically:

- The equipment **is not** an operating or administrative cost.
- It is a **project-based investment** that enhances a service used by the community.
- The organisation will take full responsibility for **staffing, using, and maintaining** the equipment going forward.
- Rotary is **not** taking on any recurring costs or creating dependency.

For these reasons, the request would be considered an eligible expense in a district spending plan.

PUBLIC RELATIONS INITIATIVES

District Grant guidance explicitly identifies **public relations initiatives as ineligible**, *unless they are essential to project implementation*. Rotary-branded merchandise falls squarely into this category because its **primary purpose is visibility, branding, and awareness**, rather than the direct delivery of services or resources to beneficiaries.

In practical grant reviews:

- Branded items are treated as **promotional by nature**
- Promotional activities are considered **public relations initiatives**
- PR initiatives are **not eligible for District Grant funding**, except in rare, clearly justified cases

The creation of Rotary branded canvases or posters to promote a specific project are considered public relations merchandise.

The branding is the deciding factor. Once Rotary branding is added, the item's function shifts from practical support to promotion of Rotary or an event.

Note: Incidental costs that include Rotary Branded merchandise may be considered if they are a small percentage of the overall project.

NOTE

The District Grants Committee are here to help you succeed with gaining a Grant, helping with advice during implementation and reporting the project. Reach out and contact us with any questions.

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