

ROTARY DISTRICT 5320 – DISTRICT GRANT GUIDELINES

2027-2028

IMPORTANT DUE DATES

- **Within 30 days of project completion:** Submit Final Report with receipts
- **March 15:** Submit Progress report for all incomplete projects
- **March 20:** District Grants training at District Training Assembly (DTA) – mandatory for (any) two club members for clubs planning to submit an application.
- **May 15:** New grant applications due
- **May 30:** Final reports due for ALL remaining projects

Note: All reporting is done in the District Grants section of www.matchinggrants.org. Instructions are in the DTA training presentation on the District Grants page of the District Grants website: [District and Global Grants - Rotary 5320 Resources](#)

GUIDELINES FOR FINAL REPORT SUBMISSIONS

- Gather receipts as projects progress – must be receipts with items purchased and payment details - not invoices!
- If you have provided funds to an organization, please submit a receipt from them stating how the funds were used.
- Create a summary sheet and arrange the receipts in order, scanning them into one document
- Answer all the questions, putting “N/A” if not applicable

CLUB QUALIFICATIONS FOR NEW GRANT SUBMISSIONS

- Annualized average of at least \$2k contributed to the TRF Annual Fund SHARE in past 2.5 years (Rotary years 2024-25, 2025-26, July – Dec 2026). Encourage members to donate!
- Attendance by (any) 2 members at District Grants training at District Training Assembly
 - Projects in Northern Mexico also require Global Grants training (or recertification) by (any) 2 members (in person or online).
- Signatures on (Local District) Memorandum of Understanding (MOU) by President and Project Chair for 2027-28.
 - Projects in Northern Mexico also require TRF (International District and Global Grants) MOU signature by Presidents for 2027-28 and 2028-29.
- Current on all District and RI dues (September 30, 2026)
- Current on all District Grant reports

GUIDELINES FOR NEW DISTRICT GRANT SUBMISSIONS

- Minimum project size: \$1,000 (with minimum DDF of \$500). Club must at least match DDF
- Bundling projects under one “project umbrella” is recommended, outlining the individual projects – this enables funds to move between projects if circumstances change during the year.
- There must be member involvement – cannot just write checks.
- Use “awards” vs. “grants” and ensure no Rotarians or family members are beneficiaries
- State (and ensure) members working with youth are Youth Protection trained
- Start date cannot be before August 1 or end after May 31 (to ensure time for review and approval by TRF and District Foundation Committee).

QUESTIONS? Gillian Bradshaw, District Grants Chair: gillian_bradshaw@yahoo.com