

(February 2026 Edition)

2026-27

Foundation Grant Application Guidebook



Rotary Foundation Committee
Rotary International District 2750

Changes in Fiscal Year 2026-27

1. The formula for calculating the DG application limit has been changed.
2. DG now requires 30% of club contributions. Maintain more than 30% of the club contribution even if the total project cost is reduced at the time of reporting.
3. The deadline for accepting DG applications has been reduced.
April 1 ~ May 15.
3. GG payment criteria. DDF is up to 5 times the club's contribution. The maximum is \$15,000 for general projects and \$25,000 for large projects.
4. Up to one GG can be conducted at the same time by one primary host and one by co-sponsor. However, Rotary Foundation Scholar hosts do not count.

Special Notes (DG Continuation Requests)

1. It cannot be implemented for the same project and the same beneficiary in the previous year.
2. It cannot be used for cash donations or events for the purpose of donations.
3. Please conduct it from 8/1 to 4/30.
3. You cannot change the project content after approval.
4. Make all deposits and withdrawals in a subsidy-only account.
5. You must not accept money from the beneficiary.



Rotary International District 2750 2026-27 Rotary Foundation Committee

PBG Grant Management Seminar Program

Date: Friday, February 6, 2026

Venue: Palace Hotel Tokyo 4th floor Yamabuki

Moderator: The Rotary Foundation Committee Grants Committee

Naomichi Yamamoto (Tokyo Sunrise Shiodome RC)

12 : 00 Opening

Greetings from the Governor Hidemasa Muto (Tokyo Cross City RC)

Message from The Rotary Foundation Committee Chair Akirai Minagawa (Tokyo Josai RC)

12 : 05 "On the depletion of DDF"

Grants Subcommittee Chair Hironori Katsuyama (Tokyo Shinagawa RC)

12 : 15 "About the use of grants"

Grants Subcommittee Yasuyuki Goto (Tokyo Yoneyama Yuai RC)

12 : 35 "RC of Pohnpei using GG ROOTS"

RC of Pohnpei Member

12 : 50 "Request for MOU"

Stewardship Subcommittee Chair Toyotsugu Otsuka (Tokyo Tachikawa RC)

12 : 55 "Donation Target"

Fundraising Subcommittee Past Chair Hiroki Suda (Tokyo Akishima Chuo RC)

13 : 00 Q&A

13 : 10 Closing

*All positions are for 2026-27

Table of Contents

Introduction	3
District Grant Policies	4
List of Foundation Donations and District Grant Limits	6
District Grant Criteria	8
Points to Note About District Grant Criteria	13
Regarding Youth Travel Activities	15
Global Grant Criteria	18
Allocation of Donations via the SHARE System	23
Usage of DDF for FY 2024-25	24
Usage of DG for FY 2024-25	26
MOU Between Districts and Clubs	28

Refer to MyRotary

[terms-conditions-rotary-foundation-district-grants](#)

[terms-conditions-rotary-foundation-global-grants](#)

Fundraising Subcommittee

Our committee is responsible for soliciting donations to Rotarians toward district goals for the Annual and Endowment Funds. In addition, we ask you to register for donations such as the Paul Harris Society, Major Donor and Bequest Society. We also help certify everyone who has donated.

District Goals

1. Donation to the Annual Fund (Share) \$150 or more per member
2. Donation to the Endowment Fund (Share) Donors reaching \$1000 (Benefactor)
Clubs with 99 or fewer members: 1 or more members, clubs with 100 or more members, 2 or more
3. Donate to PolioPlus \$30 or more per member
The number of members is the number of members at the beginning of the term. Please note the rotary rate at the time of donation. Please enter your donation goal in MyRotary.

District Recognition

- Top 3 clubs by total donation
- Top 3 clubs in terms of average annual fund contributions per person
- The above clubs that achieved the district goal 3 divisions (calculated as per capita average)

Stewardship Subcommittee

The Stewardship Committee administers MOUs between districts and clubs and assists with grant management seminars. We will also review and update our district grant (DG) reports and review and update our checklist to help clubs plan, execute, and report on projects that use district grants.

Grants Subcommittee

We help clubs by providing district and global grants to implement a variety of service projects in their local communities and abroad. By encouraging grants, we raise awareness of the significance of The Rotary Foundation and the importance of giving to The Rotary Foundation. The rules for granting subsidies change every year. Please refer to the latest handbook.

■District Grant Policy

District 2750 aims to increase the number of clubs using grants. Compared to other districts, our grant utilization rate has been significantly higher. Due to supply being unable to keep up with increasing demand, district grants ran out two years ago, and both district and global grants ran out last year.

As a result, we have significantly revised the funding criteria for both grants this year to prevent them from running out. To increase grant utilization opportunities, we will not terminate district grants when they run out, but will instead reduce them equally among all clubs. District grants will require club contributions of 30% of the total project amount.

■District Grant and Global Grant Structure

① District Grant

47.5% of annual giving (SHARE) from three years prior will be allocated as District Designated Fund (DDF) to the district for allocation. 50% of the investment returns from the Endowment Fund (SHARE) will be added to this. Up to 50% of this total amount can be used as a District Grant (DG). The Rotary Foundation Committee will allocate this amount to projects requested by each club.

⟨Example⟩ Let's say your annual giving (SHARE) three years ago was \$750,000...

(50% of the Endowment Fund investment income was approximately \$77,000 in the previous year, and the carryover from the previous year was approximately \$71,000.)

(The following figures are approximate and close to the actual amounts.)

Annual Giving (SHARE) from three years ago:	\$750,000	A
Amount returned as DDF:	\$356,250	B (A x 47.5%)
From Endowment Fund (SHARE) investment income:	\$77,000	C
Total:	\$433,250	D (B + C)
Amount available for DG:	\$216,625	E (D x 50%)

Our district will allocate this amount to the following programs.

DG1: District Grant Projects Proposed by Clubs

DG2: Grant Management Seminar

DG3: Grant Management Seminar for PBGs

DG4: Other District-Organized Projects

② Global Grants

The budget for global grants (GGs) is calculated by adding the DDF from returned annual donations to the district's allocation of investment income from the Endowment Fund and carryover funds from the previous year, subtracting district grants, and then subtracting contributions to PolioPlus and the Peace Centers.

Amount returned as DDF:	\$356,250	B
From investment income of the Endowment Fund (SHARE):	\$77,000	C
Carried over from the previous year:	\$71,000	F
Total:	\$504,250	G (B + C + F)
Amount to be used for DG:	\$216,625	E
Contribution to PolioPlus and the Peace Center:	\$50,000	H
Amount available for GG:	\$287,625	I (G - E - H)

GG1 Global Grant (Projects in Seven Areas of Focus)

GG2 District 2750 Rotary Foundation Scholars (4–5 students)

GG3 Rotary Foundation Scholars for PBG

GG4 VTT (Allocated only in the fiscal year in which it is implemented)

③ Donations that are returned as DDF

Only the Annual Fund (SHARE) and Endowment Fund (SHARE) are donations that are returned to the district as DDF. Please note that there are more than 10 types of donations to the Rotary Foundation. Until now, the district grant limit per club was calculated based on the club's total donations, but starting in 2026–27, it will be calculated based on the Annual Fund (SHARE) amount.

Examples of donations that do not receive a return: Annual Fund (Areas of Focus), PolioPlus Fund, Endowment Fund (World Fund), Disaster Response Fund, and others.

Club Contribution Records of District2750 in 2023-24 / Maximum Amount of Grant for DG in 2026-27

	クラブ名	会員数	年次基金		恒久基金	ボリオ・プラス	その他	寄付総額	補助金支給限度額			
			寄付金額	1人当りの額					基本	3部門	上乗	計
千代田	東京南	183	44,291.96	242.03	1,000.00	5,985.17	469.79	51,746.92	2,000		1,500	3,500
	東京芝	64	9,833.41	153.65	1,000.00	2,920.00	231.54	13,984.95	2,000	500		2,500
	東京新橋	47	8,315.13	176.92	1,000.00	1,501.68	308.72	11,125.53	2,000	500		2,500
	東京赤坂	52	9,695.23	186.45	0.00	1,599.00	1,050.00	12,344.23	2,000			2,000
	東京みなと	36	9,272.63	257.57	1,000.00	1,340.14	255.03	11,867.80	2,300	500		2,800
	東京麻布	15	1,373.71	91.58	0.00	0.00	0.00	1,373.71	1,000			1,000
	東京グローバル	17	2,617.11	153.95	0.00	708.61	0.00	3,325.72	2,000			2,000
	東京サンライズ汐留	14	2,410.00	172.14	1,000.00	473.00	67.11	3,950.11	2,000	500		2,500
銀座・日暮橋	東京銀座	178	40,782.43	229.11	12,000.00	5,985.86	0.00	58,768.29	2,000	500	1,500	4,000
	東京日本橋	196	32,795.84	538.43	2,000.00	6,259.20	0.00	41,055.04	2,900	500	1,500	4,900
	東京築地	61	9,396.27	154.04	0.00	1,654.28	369.06	11,419.61	2,000			2,000
	東京日本橋東	37	5,550.00	150.00	1,000.00	1,149.56	0.00	7,699.56	2,000	500		2,500
	東京中央	175	27,026.34	154.44	2,000.00	6,592.40	671.14	36,289.88	2,000	500	1,000	3,500
	東京日本橋西	42	6,750.00	160.71	1,000.00	1,370.03	154.11	9,274.14	2,000	500		2,500
	東京銀座新	75	8,034.48	107.13	1,000.00	440.14	0.00	9,474.62	1,000			1,000
	東京シティ日本橋	30	4,650.00	155.00	150.00	1,141.17	1,050.00	6,991.17	2,000			2,000
	東京中央新	60	13,353.89	222.56	1,000.00	4,501.10	100.00	18,954.99	2,000	500		2,500
	東京あけぼの	19	1,173.34	61.75	134.60	865.89	6.85	2,180.68	1,000			1,000
	東京山王	37	7,596.83	205.32	1,006.71	1,477.06	1,385.57	11,466.17	2,000	500		2,500
	東京パリアフリーマインド	18	636.94	35.39	0.00	781.16	0.00	1,418.10	1,000			1,000
	東京イマジンジョイナス	19	1,000.00	52.63	0.00	0.00	0.00	1,000.00	1,000			1,000
京浜	東京羽田	50	1,000.00	20.00	0.00	0.00	0.00	1,000.00	1,000			1,000
	東京品川	36	11,050.00	306.94	1,000.00	1,310.00	0.00	13,360.00	2,300	500		2,800
	東京大森	32	5,163.34	161.35	1,000.00	925.48	0.00	7,088.82	2,900			2,900
	東京品川中央	25	7,824.50	312.98	1,000.00	780.00	68.03	9,672.53	2,900	500		3,400
	東京田園調布	33	3,518.38	106.62	0.00	119.12	0.00	3,637.50	1,000			1,000
	東京港南マリーン	9	900.00	100.00	0.00	25.48	0.00	925.48	925			925
	東京大崎	23	1,768.78	76.90	0.00	25.48	0.00	1,794.26	1,000			1,000
	東京蒲田	63	9,450.00	150.00	1,000.00	1,920.00	0.00	12,370.00	2,000	500		2,500
	東京京浜	28	4,200.00	150.00	2,000.00	12.74	47.62	6,260.36	2,000			2,000
	東京田園調布緑	16	3,509.92	219.37	0.00	1,057.69	0.00	4,567.61	2,000			2,000
	東京白金	22	2,900.00	131.82	2,000.00	1,824.25	85.03	6,809.28	1,000			1,000
	東京高輪	19	3,000.00	157.89	0.00	827.76	0.00	3,827.76	2,000			2,000
山手	東京西	178	30,508.13	171.39	50,000.00	5,830.48	581.50	86,920.11	2,000	500	1,500	4,000
	東京城西	59	12,920.41	218.99	0.00	3,130.55	341.55	16,392.51	2,000			2,000
	東京西南	32	6,575.68	205.49	1,000.00	990.00	140.94	8,706.62	2,000	500		2,500
	東京原宿	12	2,733.24	227.77	0.00	597.50	0.00	3,330.74	2,000			2,000
	東京杉並	38	5,350.00	140.79	1,000.00	1,038.22	1,200.00	8,588.22	1,000			1,000
	東京神宮	29	6,116.32	210.91	0.00	982.46	0.00	7,098.78	2,000			2,000
	東京恵比寿	110	25,780.43	234.37	2,000.00	6,522.13	1,342.28	35,644.84	2,300	500	1,000	3,800
	東京広尾	30	7,792.39	259.75	1,000.00	1,273.65	102.74	10,168.78	2,300	500		2,800
	東京渋谷	34	9,632.32	283.30	1,400.00	1,666.52	335.57	13,034.41	2,300	500		2,800
	東京六本木	55	12,114.14	220.26	1,000.00	2,862.80	0.00	15,976.94	2,300	500		2,800
	東京愛宕	40	9,150.00	228.75	1,000.00	3,617.39	2,301.34	16,068.73	2,300	500		2,800
	東京インターナショナル ※								1,000			1,000
山手西	東京世田谷	36	8,946.37	248.51	10,000.00	4,441.37	1,684.20	25,071.94	2,000	500		2,500
	東京目黒	32	15,856.74	495.52	0.00	1,038.22	0.00	16,894.96	2,900			2,900
	東京成城	12	1,227.53	102.29	0.00	0.00	40.26	1,267.79	1,000			1,000
	東京クロスシティ	92	16,464.36	178.96	1,000.00	3,061.97	0.00	20,526.33	2,000	500		2,500
	東京城南	9	1,000.00	111.11	0.00	0.00	0.00	1,000.00	1,000			1,000
	東京山の手	78	13,638.69	174.86	0.00	2,462.89	0.00	16,101.58	2,000			2,000
	東京成城新	27	6,050.00	224.07	0.00	944.00	161.04	7,155.04	2,000			2,000
	東京青山	22	5,429.16	246.78	0.00	1,579.67	136.05	7,144.88	2,000			2,000
	東京自由が丘	14	1,696.38	121.17	1,000.00	30.00	67.11	2,793.49	1,000			1,000
	東京米山友愛	34	6,101.43	179.45	0.00	112.74	1,470.00	7,684.17	2,000			2,000
	東京米山 E クラブ2750	36	4,441.28	123.37	0.00	82.80	0.00	4,524.08	1,000			1,000
	東京代官山	31	340.14	10.97	0.00	0.00	0.00	340.14	340			340

Club Contribution Records of District2750 in 2023-24 / Maximum Amount of Grant for DG in 2026-27

	Club Name Number of members	Annual Fund		Endowment	Polio Plus	Other	Total amount	Maximum amount of Grant			
		amount	per person	amount	amount	amount		Basic	3division	Bonus	Total
多摩	東京八王子	55	9,225.00	167.73	1,150.00	2,423.76	0.00	12,798.76			
	東京町田	62	10,350.00	166.94	3,000.00	340.14	0.00	13,690.14			
	東京日野	34	5,235.10	153.97	1,000.00	1,020.00	115.65	7,370.75			
	東京八王子西	105	17,600.00	167.62	0.00	1,251.85	362.42	19,214.27			
	東京町田中	24	1,150.00	47.92	0.00	0.00	0.00	1,150.00			
	東京八王子東	34	5,100.00	150.00	0.00	5,122.19	183.67	10,405.86			
	東京八王子南	78	11,850.00	151.92	1,000.00	2,892.88	0.00	15,742.88			
	東京町田サルビア	39	6,150.00	157.69	1,000.00	1,313.76	0.00	8,463.76			
	東京飛火野	21	6,900.00	328.57	1,000.00	1,186.37	0.00	9,086.37			
	東京町田東	28	4,050.00	144.64	0.00	100.00	0.00	4,150.00			
多摩	東京八王子北	44	11,913.33	270.76	1,000.00	2,532.91	0.00	15,446.24			
	東京立川	118	18,858.15	159.81	2,000.00	130.00	0.00	20,988.15			
	東京小金井	40	6,000.00	150.00	1,000.00	3,507.43	0.00	10,507.43			
	東京国分寺	36	8,788.95	244.14	1,000.00	1,370.52	0.00	11,159.47			
	東京三鷹	39	14,901.35	382.09	37,611.71	4,926.83	2,100.00	59,539.89			
	東京昭島	47	10,200.00	217.02	1,000.00	3,338.39	248.32	14,786.71			
	東京国立	39	4,842.62	124.17	2,100.00	1,207.18	0.00	8,149.80			
	東京立川こふし	94	15,295.17	162.71	1,000.00	3,049.40	0.00	19,344.57			
	東京井の頭	26	3,900.00	150.00	2,000.00	1,840.68	20.13	7,760.81			
	東京昭島中央	54	10,000.00	185.19	1,000.00	1,788.22	0.00	12,788.22			
中	東京武蔵国分寺	45	9,473.44	210.52	1,000.00	1,690.14	161.74	12,325.32			
	東京小金井さくら	29	1,988.07	68.55	0.00	0.00	752.04	2,740.11			
	東京国立白うめ	17	1,800.00	105.88	0.00	712.24	34.25	2,546.49			
	Eクラブ 東京ピースウイング	21	1,306.86	62.23	0.00	2,612.74	6.71	3,926.31			
	東京府中	50	3,000.00	60.00	1,000.00	2,190.60	167.79	6,358.39			
	東京調布	66	10,500.00	159.09	1,000.00	2,284.54	0.00	13,784.54			
	東京多摩	17	900.00	52.94	0.00	673.03	0.00	1,573.03			
	東京稻城	25	5,049.45	201.98	1,000.00	844.15	0.00	6,893.60			
	東京武蔵府中	36	6,450.00	179.17	0.00	1,299.92	0.00	7,749.92			
	東京たまがわ	18	3,048.70	169.37	1,000.00	571.95	0.00	4,620.65			
東	東京多摩グリーン	18	990.14	55.01	0.00	419.96	689.66	2,099.76			
	東京調布むらさき	66	9,906.14	150.09	1,000.00	5,588.46	155.03	16,649.63			
	東京iシティ	18	2,800.00	155.56	1,000.00	684.28	134.23	4,618.51			
	GUAM	47	9.55	0.20	500.00	0.00	0.00	509.55			
	SAIPAN	46	5,175.00	112.50	0.00	2,200.00	0.00	7,375.00			
	TUMON BAY	64	5,160.00	80.63	0.00	0.00	0.00	5,160.00			
	NORTHERN GUAM	28	2,386.43	85.23	0.00	50.00	10.00	2,446.43			
	POHNPEI	15	180.00	12.00	0.00	600.00	25.00	805.00			
	PALAU	14	359.55	25.68	0.00	0.00	0.00	359.55			
	GUAM-SUNRISE	16	659.55	41.22	0.00	150.00	0.00	809.55			
Rotaract	TRUK LAGOON	10	9.55	0.96	0.00	0.00	0.00	9.55			
	E-Club of Pago Bay Guam	25	9.55	0.38	0.00	410.00	0.00	419.55			
	中央大学 RA		198.68		0.00	204.08	0.00	601.44			
	Rotaract Club of Marianas		156.00		0.00	0.00	0.00	312.00			
	Rotaract Club of Saipan		0.00		0.00	102.00	0.00	102.00			
	東京昭島 RA		6.62		0.00	0.00	0.00	13.24			
	東京セントラル RA		6.62		0.00	0.00	0.00	13.24			
	東京田園調布 RA		152.32		0.00	0.00	0.00	304.64			
	東京恵比寿 RA		33.11		0.00	0.00	0.00	66.22			
	東京府中 RA		0.00		0.00	0.00	0.00	0.00			
B	東京銀座 RA		150.00		0.00	120.80	0.00	420.80			
	東京八王子 RA		0.00		0.00	0.00	0.00	0.00			
	東京日野 RA		0.00		0.00	0.00	0.00	0.00			
	東京日本橋 RA		150.62		0.00	13.25	0.00	314.49			
	東京西 RA		152.32		0.00	0.00	0.00	304.64			
	東京オーキッド世田谷南 RA		66.23		0.00	85.81	0.00	218.27			
	東京渋谷 RA		66.23		0.00	0.00	0.00	132.46			
	東京品川 RA		0.00		0.00	0.00	0.00	0.00			
	東京品川中央 RA		0.00		0.00	0.00	0.00	0.00			
	東京ビジョン RA		6.37		0.00	6.62	0.00	19.36			
R	東京ICU RA ※								500		500

2026-27

■District Grant Criteria

Each club has a member on the Grant Committee, so please be sure to consult with that member if you have any questions regarding your grant application.

Furthermore, your member will provide support until the project is completed and the final report is submitted, so please feel free to contact them if you encounter any issues with the project's progress.

●Clubs that meet any of the following criteria will be ineligible for grants.

1. Clubs whose average per capita giving to the Annual Fund was zero three years prior.
2. Clubs that did not attend the 2026-27 Grant Management Seminar.
3. Clubs that do not have an MOU with the district.

●The base grant amount per project is as follows:

Total Annual Fund contributions from three years prior are \$1,000 or less. The maximum is the total annual contributions from three years prior.

\$1,000 or more in Annual Fund contributions from three years prior per person:

Under \$150:	\$1,000
\$150-\$250:	\$2,000
\$250-\$350:	\$2,300
\$350-\$450:	\$2,600
\$450 or more:	\$2,900

Achieved three categories three years prior: +\$500 bonus

Clubs that met the district goals for Annual Fund, Endowment Fund, and PolioPlus contributions.

Total Annual Contributions from three years prior:

\$20,000-\$30,000:	+\$1,000 bonus
\$30,000 or more	+\$1,500 bonus

Example: A club has 40 members, an Annual Fund of \$7,000, \$175 per capita (district goal of \$150 per capita), one Benefactor of \$1,000, and \$1,500 in PolioPlus (district goal of \$30 per capita).

The base amount is \$2,000, the three-category bonus is \$500, and the total annual contribution bonus is \$0, for a total of \$2,500.

- For joint club projects, the primary club criteria apply. There is no bonus on the maximum grant amount.

- Rotaract clubs are subject to the following criteria:

Zero contribution: None

Total amount less than \$150: \$500

Total amount over \$150: \$1,000

If annual contributions exceed \$150 per capita, they are subject to the Rotary club criteria.
(Note: Rotaract clubs with a total contribution of \$100 or more are eligible for international recognition.)

- Regarding newly established clubs.

The maximum amount for newly established clubs is \$1,000, equal to the amount of Annual Fund contributions under \$150.

The maximum amount for newly established Rotaract clubs is \$500, equal to the amount of total contributions under \$150.

● Grant Requirements and Important Notes

1. Projects must be club-sponsored or co-sponsored, with the active and direct participation of Rotarians and Rotaractors.
2. Club contributions must be 30% of the total project amount.
3. Project implementation must begin on or after August 1, 2026. The final project implementation date must be April 30, 2027. No expenses beyond this implementation period may be incurred.
4. The above amounts are maximum amounts; please confirm your club's grant funding limit before applying for the required grant amount.
5. Grant-funded projects must be publicized through the media, club newsletters, and Web White.
6. When applying for a grant, your application will be converted to dollars. The conversion rate will be the Rotary exchange rate for April 2026. When disbursing, the approved dollar amount will be deposited into the account designated by your club at the exchange rate at the time of application. The amount will be the same as when applied, unless there is a

reduction due to depletion.

7. Submit a final report within one month of project completion.
8. Be sure to comply with the "Terms and Conditions for Rotary Foundation District Grants and Global Grants" (see References). Also, please note the grant criteria in the "2026-27 Grant Terms and Conditions for District 2750" below.
9. Each club may only apply for one district grant. However, clubs that are not the primary club for a joint club project may apply for other district grants separately.

● The application period is as follows:

Application Period: Tuesday, April 1, 2026 – Saturday, May 15, 2026

*The application period has been shortened to 45 days.

● The following documents must be attached when applying online.

1. A quote addressed to the club's name.
2. If the beneficiary is an organization or has a cooperating organization, a document outlining the organization (e.g., a pamphlet)
3. A copy of a grant-only bankbook with a zero balance.

(Please note that interest is deposited into savings accounts in February and August.)

*For online applications, see the Reference Materials page.

● The exchange rate used in the application form is as follows.

The USD/JPY exchange rate used in the application form will be fixed at the Rotary rate for April 2026.

● Applications will be reviewed as follows:

1. The application will be reviewed at the Grants Committee meeting, held once a month.
2. Clubs that applied for a district grant in the previous year but have not submitted their final report by the review date will be approved after the final report is submitted. Please note that if your application is not submitted by the application deadline of May 15th, it will be canceled.

● If the total project amount changes after you apply, please follow the instructions below.

1. If the total project amount increases, please increase your club contribution.
2. If the total project amount decreases, your club contribution cannot be reduced. The grant will be refunded.

If the remaining amount is \$100 or more, please refund the entire amount to the district. If

the remaining amount is less than \$100,
please transfer the amount to your club's Smile Box (Nico Nico) account.
Please note that the district refund account has changed as of July 2025.
Mitsubishi UFJ Bank, Gotanda Branch (Branch No. 537) Current Account Number: 0957733
Rotary International District 2750, Grants Committee Chairperson, Hironori Katsuyama

(The previous bank account, Sumitomo Mitsui Banking Corporation, Shibuya Branch, cannot be used.)

- Regarding changes to project content, please follow the guidelines below.
If the project content changes significantly after submission, changes will generally not be permitted. In this case, the project will be canceled and the grant funds will be refunded. Bank transfer fees for the refund can be expensed.
You will be required to report the reason for cancellation and financial statements.
However, this does not apply if the Grants Committee and the Fund Management Committee approve the reason for the change. In this case, a statement of reasons for the change (free format) must be submitted.

- According to rules established by The Rotary Foundation (TRF), district grants cannot be used for the following purposes.
 1. Ongoing or excessive support for a specific beneficiary, organization, or community.
 2. Land and building purchases.
 3. Fundraising activities (fundraising activities may be included, but grant funds cannot be used for the fundraising activities themselves).
 4. Expenses related to Rotary events such as district conferences and anniversaries.
 5. Public relations activities not directly related to humanitarian or educational activities.

District grants cannot be used for public relations or promotional purposes for Rotary, districts, or clubs.

Please ensure that activities and expenses using grant funds are not for Rotary public relations purposes.

- 6. Project signage exceeding \$1,000 (Rotary plaques, logos, stickers, signs, etc.).
- 7. Operating, administrative, and indirect program expenses of other organizations.
- 8. Unrestricted donations to beneficiaries or collaborating organizations.

→If you make a designated cash donation, you must provide a receipt from the cooperating organization addressed to the Rotary (Rotaract) club, attaching information about the cooperating organization, photos of the items purchased and their location, and copies of

receipts for all items purchased.

9. Activities and expenses already in progress or completed.
10. Events for which fees are collected from beneficiaries.
11. Direct benefits to Rotarians, Rotaractors, Rotary clubs, Rotaract clubs, Rotary-related entities, Rotary employees, and the spouses, lineal descendants, and spouses of lineal descendants of all of the foregoing.

● When planning a project to support Youth Exchange students, please keep the following in mind:

1. Eligible Expenses

Expenses for Youth Exchange students (domestic travel, activities, school supplies, etc.)

2. Non-Eligible Expenses

Living expenses for Youth Exchange students (food, pocket money, etc.), expenses for accompanying Rotarians/Rotaractors, and payments to host families.

Note: 1) RI District 2750 has its own rules that do not apply to grants for RYLA. Grant applications for Interact service projects will count as sponsor club applications.

2) Please note that this does not apply if Youth Exchange students are direct descendants of Rotarians.

● If your project involves youth (minors) traveling overnight (regardless of distance), traveling 150 miles (approximately 241 km) or more (regardless of whether overnight stays are included), or traveling across international borders, confirmation with the TRF office is required, so you will need to answer and submit the attached "Youth Travel – Additional Questions" form. Attending an online seminar is also required.

Fiscal Year 2026-2027

■ Points to Note Regarding Grant Conditions for District 2750

1. Changes from the previous system due to changes in the Rotary Foundation's operating rules: Due to the Rotary Foundation's philosophy of emphasizing the sustainability of grant projects, "continuous support to a specific beneficiary, organization, or community is not permitted."

① Grants cannot be made to the same recipient two years in a row.

③ Grants cannot be made to the same recipient even if the project content changes.

③ Grants cannot be made to schools that previously accepted students change two years in a row.

④ The above-mentioned community scope refers to cities, towns, and villages.

2. Procedures

① If paying a cooperating organization (e.g., a nonprofit organization, government agency, etc.) to purchase products or services and donate them to the beneficiary, a copy of the cooperating organization's purchase receipt is required.

② Proof of payment to be attached to the grant report should generally be a receipt, but both an invoice and a bank transfer record are acceptable.

③ All project deposits and withdrawals should be made to a dedicated grant account. Do not mix with other club accounts.

④ The beneficiaries and use of funds cannot be changed between the time of application and the time of implementation.

Please consult with the Grants Committee in advance if your circumstances change.

⑤ The recipients of beneficiaries and project-related expenses must not include Rotarians, Rotaractors, their relatives, or their affiliated organizations or companies.

⑥ If bank interest is received, it should be recorded as "Other Income" rather than "Club Contributions."

⑦ Bank transfer fees that were not anticipated at the time of budgeting can be recorded.

Documents Required for Application

1. Items to be completed in the online application form

2. If the beneficiary is an organization or there is a cooperating organization, documents from that organization (online file attachment)

3. Proposal (online file attachment)

4. Copy of the grant account passbook (cover page and page with zero balance) (online file attachment)

Documents Required for Reporting

1. Items to be completed in the online report
2. Publicity materials are required (online file attachments).

Examples: newspaper articles, postings on the recipient's website, club name plates affixed to donations, thank-you letters from the recipient.

Club weekly reports, various social media accounts. *Please attach PDFs rather than links.

3. Cash book (online file attachment). However, this is not necessary if the details are available from your bankbook.

*If submitting online, please upload documents 2 and 3 as attachments.

*Only PDF, JPG, and PNG file formats are accepted. Word, Excel, ZIP, and other formats are not accepted.

Regarding youth travel activities

RI Policies and Online Seminar Participation

Participants must follow established policies to ensure their safety. See Rotary Code of Policies 2.120.3. "Youth Travel and Accommodation" and 2.120.4. "Club and District Requirements" for information on adult participant selection, risk management, etc.

Rotary Code of Policies <https://my.rotary.org/document/rotary-code-policies>

2.120.3. "Youth Travel and Accommodation"

- Youth participants are expected to share rooms with other youth participants of the same age and gender, unless special arrangements are made in consultation with a parent or guardian to accommodate gender identity or other needs.
- Rotary strictly prohibits youth from bed-sharing during overnight stays.

Youth may share beds with other youth of the same gender only with the express, written permission of each student participant's parent or guardian. Students without written permission will be accommodated in single-room accommodations in accordance with Rotary policy.

Young participants will share rooms only with other young people, not with adult chaperones. We recommend that adult chaperones stay in nearby rooms and conduct regular check-ins. This ensures privacy and safety. (Depending on the youth participant's circumstances, adult chaperones may share rooms with youth participants only with the permission of both the parent/guardian and the youth participant.)

2.120.4. Regarding "Club and District Requirements," item 3:

We suggest that adult Rotarian volunteers supervise the trip, rather than relying solely on school staff.

Rotary members working with minor participants are also advised to review the "Youth Protection" page on My Rotary, the "Rotary Youth Protection Guide," and to take the "Protecting Youth Program Participants" online course. My Rotary "Youth Protection"

Rotary Youth Protection Guide (PDF)

Protecting Youth Program Participants

*Online course in the Learning Center. Requires My Rotary login.

FY20–FY20 District Grant Application Additional Questions

Please add the following information to this document and answer the following questions.

Date of Completion: Year/Month/Day

Rotary Club Name:

Name of Completionist:

Title:

Young Persons (Minors):

- International Travel
- Travel of 150 miles or more (regardless of whether overnight stays are included)
- Travel that includes overnight stays (regardless of distance)

If your project includes any of the above, we will need to confirm the travel details with the appropriate department.

Please answer the following questions.

Questions

1. What are the ages of the youth participants?
2. How many youth participants are there?
3. Who will be the facilitators (chaperones)? How many adults will be involved?
4. How long will the activity last?
5. What is the approximate distance (in kilometers) from the participant's home (hometown) to the activity location?

If participants will be traveling outside of the district and/or country, which district or country will they be traveling to?

6. What type of accommodation will participants receive? Who will be hosting them? If host families are being arranged, how many participants will stay in each home? (Will they stay in

a hotel or other facility? Will they stay with a homestay? How many participants will stay in the same room? Will the accompanying adult stay in a separate room?)

7. If you are a Rotary member working with minor participants, have you reviewed the "Youth Protection" page on My Rotary, the "Rotary Youth Protection Guide," and completed the "Protecting Youth Program Participants" (online course)?

2026-27

■ Global Grant Criteria

The Grants Committee has a dedicated global grant team.

When applying for a global grant, please contact this global grant team for a pre-application consultation before submitting your DDF request. A district-specific DDF application form can be downloaded from the District 2750 website. Our global grants staff will provide advice on project planning, funding, and application preparation.

Due to a sudden increase in the number of global grant applications, our Global Grant Fund resources were depleted last year. As a result, we have made significant changes to our global grant criteria, which had remained unchanged for a long time.

● Clubs that meet any of the following three criteria will be ineligible for grants.

1. Clubs with an average per capita giving to the Annual Fund three years prior was zero.
2. Clubs that did not attend the 2026-27 Grant Management Seminar.
3. Clubs without a district MOU

● Program Requirements for Global Grants

1. Projects must be related to one or more of the seven areas of focus.

- 1) Peacebuilding and Conflict Prevention
- 2) Disease Prevention and Treatment
- 3) Water, Sanitation, and Hygiene
- 4) Maternal and Child Health
- 5) Basic Education and Literacy
- 6) Community Economic Development
- 7) Environmental Conservation

2. Sustainable Projects

Provide long-term solutions by empowering local communities to address their needs on their own even after the grant ends.

3. Measurable Projects

Record baseline data for evaluation and demonstrate concrete changes over at least three years.

4. Submit a final report within two months of the project's completion.
5. Submit interim reports.

Projects can last longer than one year, but interim reports must be submitted every 12 months. (Submit within 12 months of the grant payment date.)

6. Comply with the "Terms and Conditions for Awards and Acceptance of Rotary Foundation

District and Global Grants.”

7. The total project amount must be \$30,000 or more.

● About Grants

Global grants can be funded by both World Fund (WF) and District Fund (DDF).

Grant from the Rotary Foundation (WF World Fund)

Each district’s DDF is funded at an 80% rate. The maximum WF award is \$400,000. The WF minimum award amount has been abolished. There is no minimum country contribution requirement.

Grant from District Fund (DDF)

Global grants can be funded not only by WF grants but also by the district’s DDF budget. To apply, first contact your district grant committee, complete the online application, and then submit it as a PDF to the committee. Please also attach a copy of the estimate, if possible.

Note: If your club’s DDF grant application has not been approved by the Grant Committee, your application will not be approved.

Application Period: March 1, 2026 – January 31, 2027

*Application requirements may change each fiscal year. You can submit a draft application at any time.

Amount Granted

For projects where a club in RI District 2750 serves as the primary sponsor (international sponsor or host sponsor), DDF funding for each project will be up to five times the club’s contribution.

The maximum amount is \$15,000 per project, but this may be exceeded (up to \$25,000) depending on the project’s content and scale, such as joint projects. Furthermore, if a club in the district participates in a project as a cooperating club (co-sponsor) other than the primary sponsor, DDF funding will be limited to one time the club’s contribution (up to a maximum of \$10,000).

●About applying for global grants

If you are using district DDF, submit a DDF application and receive its approval, then apply online at the My Rotary Grant Center. Once you have completed the draft GG application, print it out as a PDF and submit it to your grant committee. Online applications must be completed directly by the club’s project manager (the grant committee cannot enter

information on your behalf; however, they will provide guidance). If DDF is being used, the governor and district Rotary Foundation chair must sign (check) the application.

● On-site assessments are now mandatory for global grant applications.

As of July 1, 2018, a site assessment is required for global grant applications. This assessment identifies the most important needs for the project. This assessment can be conducted by either the host country Rotary club or the donor country Rotary club. Generally, due to financial reasons, it is preferable for the host country Rotary club to conduct it.

There are six methods for conducting this field survey: holding a forum (resident meeting), conducting a survey, conducting an interview, holding a focus group (roundtable discussion), conducting a community resource assessment, and conducting a mapping survey. Simply talking to a few local stakeholders will not fully understand the needs of the community. Conducting a thorough survey is essential.

For information on how to conduct a field survey and the Community Assessment Results Form for reporting your survey results, please visit the District Rotary Foundation Committee website (<https://rid2750org/trf/>).

● Application Period Suspension

Applications will be accepted at any time from March 1, 2026. Applications will close if District 2750's DDF is depleted or if Rotary Foundation World Fund funding runs out.

● Global Grant Process

Application (Grant Committee approval is required if district DDF is used)

- ① Consult with the Grant Committee
- ② Submit a DDF application to the Grant Committee
- ③ Create a draft Global Grant application in My Rotary. Submit this as a PDF file.
- ④ The District Grant Committee approves the use of DDF.

(If district DDF is being used, the governor and district Rotary Foundation chair will sign.)

- ⑤ Rotary Foundation headquarters staff reviews the application.

(If any missing documents are found, a Rotary Foundation staff member will contact the project manager directly.)

- ⑥ Rotary Foundation headquarters approval

(Sponsors will be notified of approval and informed of payment instructions.)

*Approval takes approximately four weeks from the time Rotary Foundation headquarters receives the necessary application information.

If the application is not approved within six months of submission, it will be canceled.

④ From this point on, communication between the sponsor (club) and Rotary Foundation headquarters will be direct.

Payment

① The sponsor submits bank account information, signs the agreement, and pays the club's contribution.

② The grant is paid by Rotary Foundation headquarters.

*Grant payment takes approximately two to four weeks from the time Rotary Foundation headquarters receives the bank account information, signed contract, and club/district contribution.

Reporting

① Sponsors must submit interim reports online every 12 months until the project is completed. The final report must be submitted within two months of the project's completion.

② Rotary Foundation headquarters staff will review the report (if any information is missing, Rotary Foundation staff will contact the project manager directly).

③ The grant project will be closed upon receipt of the appropriate final report. (A project completion notice will be sent to the sponsor.)

● Other Notes

① A club can be the primary sponsor (leading co-sponsor) of only one project at a time. Once the project is concluded (after the final report is accepted by the TRF), it will no longer count. Also, non-primary sponsors (co-sponsors) can only sponsor up to two projects. However, sponsoring a Rotary Foundation scholar will not count.

② A dedicated account must be opened and managed for each grant project. (An interest-free account is recommended; however, it can be reused by clearing the balance to zero.) All grant receipts, vendor payments, etc. must be made from this account. After the grant funds have been used, the bankbook must be kept for 10 years.

① The total budget for a global grant must be at least \$30,000. Projects that do not meet this minimum funding threshold will not be eligible. The maximum funding amount from the World Fund is \$400,000.

④ For global grants, clubs must record basic data for evaluation and conduct specific research to document the changes made over a period of at least three years. Clubs may be audited by The Rotary Foundation, so be sure to retain the results of the research for three years after the project's completion.

● Example of Global Grant Structure

(From the Rotary Foundation Handbook, Information Research Group)

Example: Global Grant Budget of \$30,000

Budget Allocation Table

Club / District / Other		Cash	DDF	Estimated WF
Host Country	RIDxxxx		\$1,000	\$800
	○ORC			
International Sponsor	RID2750		\$14,000	\$11,200
	○ORC	\$3,000		
Total		\$3,000	\$15,000	\$12,000
Grand Total			\$30,000	

Funding Rules and Notes

Estimated World Fund (WF) Allocation: 80% matching for DDF; 0% matching for Cash contributions.

Cash Contribution Fee: An additional 5% transaction fee is required for all cash contributions.

● DDF Application Form (Excel format)

No data. Please contact Global Grant Team.

Downloadable from the Rotary Foundation Committee page on the District 2750 website.

<https://rid2750.org/trf/>

Distribution of Contributions Through the SHARE System

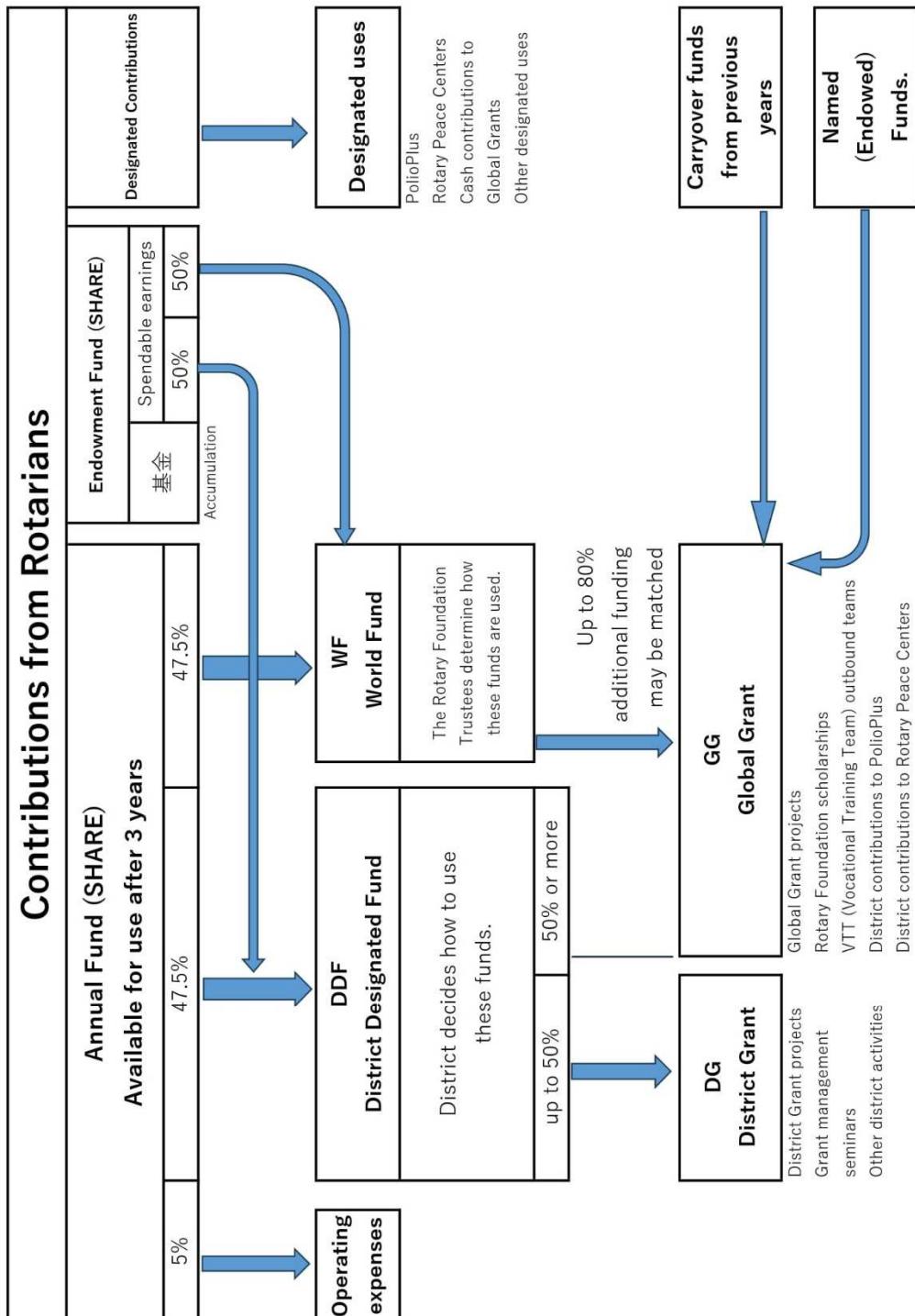
Contributions to the Annual Fund (SHARE) are invested for three years and then allocated 47.5% each to the DDF and the World Fund.

The remaining 5% is used for operating expenses (fund development and general administration).

The spendable earnings from the Endowment Fund (SHARE) are distributed 50% to the DDF and 50% to the World Fund.

The only contributions that return to the district as funds available for district use are those from the Annual Fund (SHARE), the Endowment Fund (SHARE), and Named (Endowed) Funds.

DDF: District Designated Fund WF: World Fund DG: District Grant GG: Global Grant VTT: Vocational Training Team





AVAILABLE DDF BY DISTRICT

For District 2750 In Program Year 2024-25

Transaction	Description	Amount	Balance
47.5% of Annual Fund Share contributions from 2021-22		\$377,086.26	\$377,086.26
50% of Available Endowment Fund Share Earnings		\$79,907.88	\$456,994.14
Total Carry Forward		\$114,910.00	\$571,904.14
Carry Forward from Program Years			
	2020-21	2021-22	2022-23
	\$114,910.00	\$0.00	\$0.00
Transfer	To PP - DDF Funded (Program Year 2021)	(\$80,000.00)	(\$491,904.14)
		(\$80,000.00)	(\$491,904.14)
Total DDF Transferred			
Project Funding	DG2567226	(\$225,732.00)	
Project Funding	GG2465160	(\$22,222.00)	
Project Funding	GG2466072	(\$22,222.00)	
Project Funding	GG2466197	(\$22,222.00)	
Project Funding	GG2567892	(\$20,000.00)	
Project Funding	GG2571104	(\$30,000.00)	
Project Funding	GG2573826	(\$2,500.00)	
Project Funding	GG2574797	(\$15,000.00)	
Project Funding	GG2576705	(\$22,222.00)	
Project Funding	GG2579741	(\$22,222.00)	
Project Funding	GG2579853	(\$22,222.00)	
Total DDF Funding		(\$426,564.00)	\$65,340.14
Returned Funds	DG2567226	\$5,832.55	\$71,172.69
Total DDF Returned Funds		\$5,832.55	\$71,172.69



AVAILABLE DDF BY DISTRICT

For District 2750 In Program Year 2024-25

DDF Balance by Program Year - Estimate		2020-21	2021-22	2022-23	2023-24	2024-25	Rolled Forward Amount for District 2750
\$34,910.00		\$0.00	\$0.00	\$0.00	\$0.00	\$36,262.69	\$71,172.69

GG2567892 Tokyo-West to provide two portable echocardiogram machines, for a health center Rota and Tinian, respectively, in the Commonwealth of the Northern Mariana Islands

GG2571104 Tokyo-Setagaya to provide basic medical equipment to improve the level of health care at Waeng Noi Hospital in Waeng Noi District, Khon Kaen, Thailand

GG2573826 Tokyo Crosscity to provide medical equipment to the urology department for at-risk severe urology patients as well as homeless patients at the Raphel Clinic in Seoul, Korea

GG2574797 Tokyo Yoneyama Yuai to enhance the capacity of Shri Prayagdham Trust Charitable Hospital in Pune, India to perform surgeries by providing operating room surgical equipment and addressing medical needs for those who cannot afford it.

The expenses of \$22,222 are Global Grant scholarship.

Data as of 24-Jan-2026

Page 2 of 2

AvailableDDFbyDistrict FV000013.2505E

GRANT INFORMATION District Grant 2024-25

Grant Number

DG2567226

Grant Status

Closed

LAST ACTIVITY

22/07/2025

#	District or club	Activity or project category	Location	Total amount (USD)
1	Tokyo Kunitachi Shiroume	Community development	Japan	1,880
2	Tokyo Shinagawa Chuo	Health	Japan	2,464
3	Tokyo Seijo	Education	Japan	2,820
4	Tokyo Hiroo	Health	Japan	3,608
5	Tokyo-Minato	Education	Japan	4,042
6	Tokyo Akebono	Education	Taiwan	1,880
7	Tokyo Atago	Community development	Japan	3,446
8	Tokyo Musashi Fuchu	Education	Japan	3,050
9	Tokyo-Shiba	Education	Japan	2,978
10	Tokyo Chofu	Education	Japan	3,760
11	Tokyo Ebisu	Education	Japan	4,700
12	Tokyo Ginza	Environment	Japan	1,410
13	Tokyo Shimbashi	Education	Japan	3,747
14	Tokyo Kunitachi	Community development	Japan	1,743
15	Tokyo Sanno	Peace	Poland	3,760
16	Tokyo Machida East	Environment	Japan	2,820
17	Tokyo Tachikawa Kobushi	Education	Japan	2,490
18	Tokyo Mitaka	Environment	Japan	5,828
19	Tokyo Machida	Environment	Japan	2,820
20	Tokyo Machida-Salvia	Education	Japan	3,760
21	Tokyo Crosscity	Education	Japan	3,306
22	Tokyo-West	Education	Japan	4,982
23	Tokyo Musashi Kokubunji	Community development	Japan	4,042
24	Tokyo Akishima	Community development	Japan	3,760
25	Tokyo Kokubunji	Education	Japan	4,042
26	Tokyo Sunrise Shiodome	Health	Japan	3,760
27	Tokyo Yamanote	Education	Japan	3,760
28	Tokyo Koganei	Community development	Japan	3,760
29	Tokyo Koganei-Sakura	Education	Japan	1,868
30	Tokyo Nishi (West)	Education	Japan	1,401
31	Tokyo Seijo Shin	Community development	Japan	4,888
32	Tokyo Seinan	Community development	Japan	3,760
33	Tokyo Yoneyama Yuai	Education	Japan	1,880
34	Tokyo Vision	Education	Japan	1,407
35	Tokyo Tamagawa	Community development	Japan	1,868
36	Tokyo Chofu Murasaki	Water	Thailand	4,982
37	Tokyo Akishima Chuo	Health	Mongolia	4,982
38	Tokyo Konan Marine	Community development	Japan	1,880
39	Tokyo-Setagaya	Community development	Japan	5,158
40	Tokyo Inokashira	Community development	Japan	1,542
41	Tokyo Inagi	Education	Japan	3,024
42	Tokyo Global	Education	Japan	1,071
43	Tokyo Tama	Community development	Japan	1,880
44	Tokyo Nihonbashi	Health	Japan	3,972
45	Tokyo Hachioji West	Water	Thailand	3,760

#	District or club	Activity or project category	Location	Total amount (USD)
46	Tokyo Jingu	Health	Japan	3,595
47	Tokyo Shibuya	Community development	Japan	3,759
48	Tokyo Hachioji East	Community development	Japan	3,736
49	Tokyo Hino	Education	Japan	2,348
50	Tokyo Tsukiji	Peace	Japan	4,700
51	Tokyo Chuo	Community development	Japan	4,950
52	Tokyo Ginza New	Water	Nepal	1,880
53	Tokyo Tobihino	Community development	Japan	2,449
54	Tokyo Chuo Shin	Education	Japan	1,572
55	Tokyo Kamata	Community development	Japan	2,801
56	Tokyo Roppongi	Health	Japan	3,760
57	Tokyo Hachioji North	Community development	Japan	2,106
58	Tokyo Hachioji South	Education	Japan	1,579
59	Tokyo Shinagawa	Community development	Japan	2,106
60	Chuo University	Health	Thailand	790
61	Tokyo-Meguro	Environment	Japan	2,099
62	Tokyo Takanawa	Environment	Japan	1,536
63	Tokyo Nihonbashi West	Education	Japan	1,706
64	E-Club of Tokyo Peace Wing	Health	Japan	1,053
65	Tokyo-South	Education	Japan	2,632
66	Tokyo Aoyama	Education	Japan	849
67	Tokyo Ginza	Education	Japan	1,865
68	E-Club of District 2750, Tokyo Yoneyama	Education	Myanmar	1,579
69	Tokyo Azabu	Education	Japan	1,046
70	Tokyo Osaki	Education	Japan	767
71	Tokyo Shirokane	Community development	Japan	1,002
72	Tokyo-Omori	Water	Cambodia	1,394
73	Tokyo i City	Education	Japan	583
74	Saipan	Peace	Northern Mariana Islands	2,000
75	2750	District support	Japan	15,000
76	2750	District support	Guam	2,500

Contingency fund:

Administrative expenses fund:

Total amount (USD): 225,732

FOR SUBMISSION

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 / Rotaract) Club of _____,

the undersigned agree to comply with all of the conditions and requirements of the MOU for Rotary year **2026-27** and will notify Rotary International District **2750** of any changes or revisions to club policies and procedures related to these requirements.

Club President	
Term	2026-27
Name	
Signature	
Date	

Club President	
Term	2027-28
Name	
Signature	
Date	



THE ROTARY FOUNDATION

CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds

1. Club Qualification

To obtain qualification, 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 district's grant management seminar each year. A club must be qualified to receive global grants, corporate social responsibility (CSR) grants, and programs of scale grants. Club qualification is not required for a club to receive district grant funds. Districts may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in district grants. By completing these requirements, the club becomes qualified and eligible to participate in Rotary grants.

- 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

The 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 grant funds, the club must have a dedicated bank account that is used solely for receiving and disbursing TRF grant funds.

- A. The club bank account must:
 - 1. Have a minimum of two Rotary member signatories from the club for disbursements
 - 2. Be a low- or noninterest-bearing account
- B. Any interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.
- C. A separate account should be opened for each club-sponsored grant, and the name of the account should clearly identify its use for grant funds.
- D. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.
- E. Bank statements must be available to support receipt and use of TRF grant funds.
- F. 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:
 - 1. Bank information, including copies of past statements
 - 2. Club qualification documents including a copy of the signed club MOU
 - 3. 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
 - 4. Information related to grants, including receipts and invoices for all purchases
- B. Club records must be accessible and available to Rotary members in the club and at the request of the district
- C. Documents must be maintained for a minimum of five years, or longer if 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 TRF 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/Rotaract Club of _____, the undersigned agree to comply with all of the conditions and requirements of the MOU for Rotary year _____ and will notify Rotary International District _____ of any changes or revisions to club policies and procedures related to these requirements.

Club President	
Term	
Name	
Signature	
Date	

Club President-elect	
Term	
Name	
Signature	
Date	

The Rotary Foundation approves changes to funding model, set to take effect 1 July

To better support the growth of global grants, The Rotary Foundation Trustees recently approved policy changes to help balance financial resources with program demands. These changes will take effect 1 July 2021.

The global grants program has been a tremendous success since it launched in 2013-14. That first year, the Foundation awarded 868 global grants worth \$47.3 million. By 2019-20, the number of global grants awarded increased to 1,359, worth \$95.6 million. While global grant funding increased by more than 100%, contributions to the Annual Fund, which is the primary source for global grant funding, did not keep pace. The demand for global grant funding is far greater than what is available.

Moreover, the Foundation responded to the unprecedented challenges brought on by COVID-19 by awarding \$32 million in disaster response grants since March 2020 to projects aimed at fighting the pandemic.

The amount available from the World Fund for global grants each year depends primarily on Annual Fund contributions. Over the last several years, the World Fund, which provides the necessary funding for our highest priority activities, has been depleted before each Rotary year ends, leaving many grant proposals unfunded. This year, the Foundation implemented several cost-saving measures in an effort to increase the funding available for global grants. The Trustees and the RI Board also transferred \$15 million from the Foundation's operating reserves and RI's budget surplus to the World Fund. In total, nearly \$20 million in additional funding is being made available this year. Unfortunately, it's still not enough to meet demand. Trustees expect a financial shortfall this year and in years to come due to the growing success of the global grant program.

Therefore, in an effort to fund more global grants, these policy changes will take effect 1 July:

1. **District Designated Fund (DDF) contributions transferred to PolioPlus will be matched at 50% instead of 100% by the World Fund before being matched by the Bill & Melinda Gates Foundation.** The Gates Foundation will continue matching 2-to-1 every dollar that Rotary commits to polio eradication, up to \$50 million per year.

2. **The World Fund match of DDF will be reduced from 100% to 80% when being used for global grants.** For 2020-21, as long as funds remain available, DDF will continue to be matched at 100% as long as applications are submitted by 31 May and approved by 30 June. Applications that are not approved this Rotary year will need to be resubmitted with adjusted financing.
3. **Five percent of the current year's Annual Fund-SHARE contributions will be taken equally from the World Fund and DDF to help fund operating expenses.** Currently, a \$100 Annual Fund-SHARE contribution is divided as \$50 for DDF, \$45 for the World Fund, and \$5 for operating expenses. Starting 1 July 2021, a \$100 contribution will be divided \$47.50 to DDF, \$47.50 to the World Fund, and \$5 to operating expenses. As shown by the Foundation's reviews from several independent charity ratings, our stewardship of contributions has made The Rotary Foundation one of the most highly rated and effective nonprofits. We received a four-star rating from Charity Navigator for 13 straight years.
4. **The ability to roll over unused DDF will be limited to five years.** Districts are encouraged to fully use their DDF to make a positive impact through our programs, but the amount of DDF rollover remains high — on 1 July 2020, \$48.8 million was carried into the current Rotary year. At the end of each Rotary year, starting 1 July 2026, DDF that has been held for more than five years will be applied at the district's discretion to PolioPlus, areas of focus Endowment funds, Rotary Peace Centers, the Endowment Fund, the Disaster Response Fund, or the World Fund.

Questions about these funding model policy changes can be sent to rotarysupportcenter@rotary.org.

8-Feb-2021



国際ロータリー第2750地区