

Rotary Club of San Francisco San Francisco Rotary Foundation

Grantmaking Guidelines Effective for 2026-2027 Rotary Year

Revised: 1.15.26

Introduction

The purpose of this document is to provide clear and consistent guidance to organizations and members seeking funding through the Rotary Club of San Francisco and the San Francisco Rotary Foundation's (SFRF) annual grant program. These guidelines are intended to establish transparency in the application process, ensure responsible stewardship of SFRF resources, and promote effective evaluation of proposals submitted through the annual grants process. These guidelines will take effect upon approval by the San Francisco Rotary Foundation.

Glossary of Terms

- **Signature Project** – Club-designated "flagship programs" receiving priority funding annually.
- **Competitive Grant Funds** – Funds available after standing grant commitments are deducted.
- **Rotary Year** – Fiscal from July 1 to June 30.....not Jan-Dec calendar year.
- **SFRF (San Francisco Rotary Foundation)** – A sentence defining the financial role in grant funds that are provided to the Club.
- **Grant Review Committee** – Leaders of both club and SFRF who help guide the grant process along various tiers of approvals for funding
- **Committee Operating Budget** – Funds allocated directly to committees outside the grant cycle.
- **New Project** – First-time applicant or initiative that was not previously funded.
- **Returning Partner** – 501 c(3) organization with prior successful funding history like Homeless Prenatal Program, SF/Marin Food Bank, etc.
- **Corpus** – Endowment principal used to calculate the total grant funds annual distribution

Roles & Authority

- **Committees** – Reviews and makes recommendations of grants
- **Grant Review Committee (GRC)** – Prioritizes lists of grants from all club committees who have submitted grants and makes recommendations
- **Rotary Club Board** – Reviews the prioritized list and makes recommendations for the SFRF
- **SFRF** – Makes the final decisioning of grant approvals and release of funds.

Annual Grantmaking Framework

Each Rotary year, the SFRF allocates funds to support service initiatives that advance Rotary's mission. A portion of the Foundation's funds is reserved annually for standing programs such as youth leadership development, large-scale community benefit events, and other commitments previously authorized by the Foundation. The remaining balance constitutes the pool of funds available for competitive grantmaking.

The competitive grants process starts in the third week of January. Applications are due in the second week of March. Committees convene during March and April to conduct a structured review of all applications. Final grant recommendations decisions are made by the Grant Review Committee to the Rotary Club of San Francisco and SFRF Boards of Directors. Awards will be announced in June. Funds are released at the beginning of the subsequent Rotary year.

Available Competitive Grant Funds

For planning purposes, the SFRF anticipates that approximately \$226,000 will be available for distribution in the 2026-2027 Rotary Year. Available funding will be determined in January of each year. Members of the Rotary Club of San Francisco have built a strong foundation over 118 years. By policy, the available grant funds are determined by the Executive Committee of the SFRF based on a 4% distribution of the rolling three year average of the corpus of the total net assets of the SFRF without donor restrictions.

Project Categories

Funds will be allocated during the grant process in three separate categories:

1) Signature Projects

The Rotary Club of San Francisco's signature projects have been identified as:

- Rotary Youth Leadership Academy (RYLA)

- Bike Build
- Emergency Services Day
- ARC Thanksgiving

2) Other Service Projects that have recently been funded

3) New Projects

The SFRF will meet to approve projects in two different sessions. 1) To review and approve the Signature projects. 2) The Other Projects and the New Projects. Funding for the Signature projects will be determined first in the decision-making process. The remaining available funds comprise the competitive available funds.

Emergency Reserve Fund Pool

Beginning in the 2026-2027 Rotary Year, \$10,000 of the available funds will be designated as undesignated when decisions are made in June, 2026. These funds will be set aside for emergency needs that may occur during the Rotary Year 2026-2027. Allocation of the Emergency Fund will be subject to the approval of the Rotary Club of San Francisco and the SFRF Boards of Directors. Projects that would be eligible for this funding would include humanitarian projects that occur around the world (Disaster relief as an example) and other important projects the club feels strongly about, as was the case with the 2025-2026 Climate Change initiative.

Tiered Grant Structure

To promote clarity, fairness and efficiency in evaluating requests, the SFRF will use a tiered structure for competitive grants. This structure encourages applicants to request only the amount necessary for the proposed project and ensures balanced distribution across project types.

Tier One

- Award Size: Greater than \$10,000.
- Number of awards: up to two annually depending on available funds
- Intended for high impact proposals with strong organizational capacity and measurable long-term outcomes

Tier Two

- Award size: \$5,001- \$10,000.
- Number of awards: approximately six to eight annually.
- Intended for established programs or well-developed new initiatives with significant community or international benefit.

Tier Three

- Award size: \$3,000-5,000
- Number of awards: approximately 10-12 annually
- Intended focused projects with clearly defined goals and modest resource needs

Projects Assigned to Rotary Service, Inc.

Certain small or recurring service activities do not require evaluation through the competitive grant process. Examples include small community engagement events, cultural programs, and other modest initiatives that align with committee objectives but do not require formal grant review. This approach preserves competitive grant funds for larger projects while empowering committees to manage smaller activities efficiently. The Rotary Club of San Francisco Board of Directors will make a recommendation to the SFRF Board of Directors concerning the projects that will be assigned to Rotary Service, Inc. for funding. These projects will need to be reviewed carefully since Rotary Service, Inc. has limited funding.

Evaluation Process

All applications will be reviewed using consistent criteria that assesses:

- Community or international impact
- Alignment with Rotary values and areas of focus
- Feasibility and organizational capacity
- Budget clarity and financial responsibility
- Measurable outcomes
- Opportunities for member involvement

Committees will highlight proposals in each tier for further consideration by the Grant Review Committee. The Grant Review Committee will make final recommendations to the Board of Directors of the Rotary Club of San Francisco based on the total funds available and the overall balance of awarded projects. The President for the Rotary Year 2026-2027 will present funding recommendations to the SFRF in June, 2026.

Applicant Expectations

Organizations receiving grants must agree to provide follow up information describing project outcomes, use of funds, and community impact. Grantees will also receive instructions regarding recognition of the Rotary Club of San Francisco in public communications and on social media. Failure to provide requested follow up may affect eligibility for future grants.

Other Grant Application Requirements

Grant applications may only be submitted by members of the Rotary Club of San Francisco who are in good standing. Grant recipients for awards that were made in the 2025-2026 Rotary Year may only submit a new grant application for the Rotary Year 2026-2027 if a final report (if the project is completed) or an interim report, if the project is not completed has been provided. Reports are due March 27, 2026 before a new grant application can be considered. Changes to existing grants will need to request approval for the change from the SFRF.

Conclusion

These guidelines establish a structured, equitable, and transparent approach to grantmaking. They are intended to support the strongest possible community and international service impact while ensuring consistent stewardship of the Foundation's resources. Upon approval by the San Francisco Rotary Foundation, this document will serve as the official guidance for all applicants participating in the Rotary Club of San Francisco competitive grant process.