

DISTRICT GRANT CYCLE FOR ROTARY YEAR 2022 – 2023 (rev'd 220309)

Introduction

This document is an overview of the cycle for District Grant in Rotary District 5010. The District Grants discussed here are funded in part by District Designated Funds (“DDF”) which our District receives from The Rotary Foundation (“TRF”).

The website www.matchinggrants.org (“Grants Website”) is used each step of the way. The Grants Website is used to comply with the rule that all documentation for a District Grant be maintained for five years.

Not everything about the Grants Website is addressed in this document. There are links at the bottom of the screen called ***Welcome to the Rotary District Grants Website*** on the Grants Website with more information. They are on a banner of options at the bottom of this screen and called ***FAQs*** and ***About This Site***. This document will help you navigate to this page and other resources on the Grants Website.

There is also more information about District Grants on the District 5010 Website, www.rotarydistrict5010.org. To get there, when you are on the home page of the District 5010 website, click on ***Foundation*** tab, then click on ***District Grants and Global Grants***. You arrive at a screen which in the upper left corner says ***Grant Information***. This page has everything you need to work with your District Grant.

For other questions, contact Paul Paslay, Grants subcommittee chair, at paul@paulpaslay.com, 907-720-8661. During the cycle of your District Grant, you will be assigned to work directly with a member of the Grants subcommittee team. The Grants subcommittee team is mainly here to deal with the financing of a District Grant, and to assist with the grant cycle, and we ask that each club make a reasonable attempt to navigate through the Grants Website before contacting us.

Important Dates

Here are some key dates to remember about your District Grant:

DATE	WHAT
April 20, 2022	April 20 is the deadline for applying for a District Grant. The two qualification steps do <i>not</i> need to be done by April 20, but must be completed before your DDF will be distributed to you (please qualify asap). The two qualification steps are to review and sign a Memorandum of Understanding (aka MOU), and to view a Grant Management Seminar.
July 1, 2022	District Designated Funds (aka DDF) is distributed to your club after this date.
October 31, 2022	If your club has not yet qualified for your District Grant, the DDF for your District Grant may be re-allocated.
May 31, 2023	Deadline to file the final report for your District Grants, together with bank cancelled checks, invoices marked paid and other similar proof of payment of grants funds. You should file the final report and checks/invoices within two months of completing the project

District Grant Guidelines

1. May be a local or international project;
2. Should include active Rotarian participation, and not just write a check;
3. The projects should align with TRF mission statement, which is “to enable Rotarians to advance world understanding, goodwill and peace through the improvement of health, the support of education and the alleviation of poverty”.
4. The request for DDF must be matched at least 1:1 with club contributions; and
5. No more than 3 District Grants may be awarded to any one club

District Grants can be used for a wide variety of activities, including but not limited to funding scholarships, supporting vocational training teams, sponsoring volunteer service, providing disaster relief, and carrying out community and international service projects.

The two steps to Qualify Your Club for a District Grant

There are two steps to qualify your club for participation in this TRF program. Each time a club applies for a District Grant:

1. At least one club member views a Grant Management Seminar (aka GMS)
2. Two club members review and sign (online, please) the Memorandum of Understanding (aka MOU).

How to view the Grant Management Seminar

Go to the Grant Information page and click on ***Grant Management Seminar (aka GMS)- Part 1***, and view it. Then click on ***Grant Management Seminar (aka GMS)- Part 2***, and view it. After your view both parts, please email the Grants subcommittee team, or Paul Paslay, that you have done so.

In the past the GMS was given at the President Elect Training Seminar (PETS) in Seattle. The incoming presidents, who are usually most involved in choosing the District Grant(s) to complete during their year as president, sit for a ~two hour seminar. The current trend is to move to an online seminar.

The GMS, Part 1 and Part 2, are not the only ones you can watch. In the Learning Center of the My Rotary section of the Rotary International website, <https://my.rotary.org>, there is an excellent Grant Management Seminar. However, this GMS is mostly about Global Grants, and the requirement in this document, to view Part 1 and Part 2, will better acquaint you with the nuts and bolts of a District 5010 District Grant.

How to Sign the Memorandum of Understanding (MOU)

1. On the Grant Information page, click on **Memorandum of Understanding (aka MOU) (rev'd July 1, 2022)** and review this three page document. You may also refer to *the Financial Management Plan (referred to in MOU)*, which is also on the Grant Information page.
2. After review, click on **Please sign MOU online here.**
3. The screen called **Club Qualification Summary for District 5010 in 2021-22** appears:

Developed by District 5340
for use by the entire Rotary world

My Account | District Grants | My Account | Global Grants

Club Qualification Summary for District 5010 in 2021-22

Note: This list is only correct if the district and club leadership are actively using the tool to record the fulfilled requirements for club qualifications. In some instances it is possible that a qualified club would still be listed in red on this page if nobody recorded it on this website. However if a club is listed in green it is nearly certain that the club is really qualified, even if the list is not fully updated.

37 clubs: 21 qualified, 16 non-qualified ◀ 2021-22 ▶

Club Name	President's Name	PE's Name	MOU	GMS
Anchorage	Tyann Hollis	Dave Myers	✓	✓
Anchorage East	Jon Dyson	Kara Blake	✗	✗
Anchorage Gateway	Lamar Cotten	Alex Tatum	✓	✓
Anchorage Hillside	Jon Scudder	Penny Palmquist	✓	✓
Anchorage International	Ric Schmidt	Jay Tung	✓	✓

4. Use the blue arrows to select Rotary Year 2022 – 2023

- Click on your Club name. This screen called **Club Qualification Details** appears:

Club Qualification Details
[Back to list of clubs](#)

Anchorage East Rotary Club, District 5010 in 2022-23

Requirements	Status	Comments
1. Have the 2022-23 and 2023-24 Club Presidents sign the Memorandum Of Understanding (MOU).	❌	No MOU on file. See instructions below to fix this.
2. Have 1 club member attend the Grants Management Seminar.	❌	No recorded attendance. Attendance is recorded by the District Qualification Administrator.

Sign the Memorandum Of Understanding (MOU)

Electronic Signature

The MOU can be signed electronically by the 2022-23 and 2023-24 club presidents. If you select this option an email with a special code will be emailed to them, with a link to go to a custom signature page. Enter the code on this page and the MOU will be signed.

Start the signature process:
send the signature key to the 2022-23 and 2023-24 Club Presidents.

President 2022-23

Name:

Email:

President 2023-24

Name:

Email:

The signature is certified by this exact email address.
If the email addresses above are not the addresses of the 2022-23 and 2023-24 Club Presidents the signature will not be valid.

Or

Upload PDF Document

If you don't want to sign the MOU online you can upload a scanned copy of the signed MOU in PDF format.
[Click here](#) to see a blank copy of the MOU in PDF format.
 Once you have signed the MOU you can click the "Browse" button below to select the PDF file on your computer, and click the "Upload" button.

Select the document to upload and click "Upload"

No file chosen

- In the section called **Electronic Signature**, fill in the name and email of your incoming club president and also fill in the name and email of the following year's club president. If you have not designated the president for the following year, use the name and email of your Foundation Chair or a board member willing to sign.
- Click the **Send Signature Keys** button. The Grants Website will send an email to these people providing a link to go and "sign" the MOU by entering a signature key.
- Please do not use the section called **Upload PDF Document**. Although this works, too, it is less time consuming to sign online.

How to Apply for the District Grant

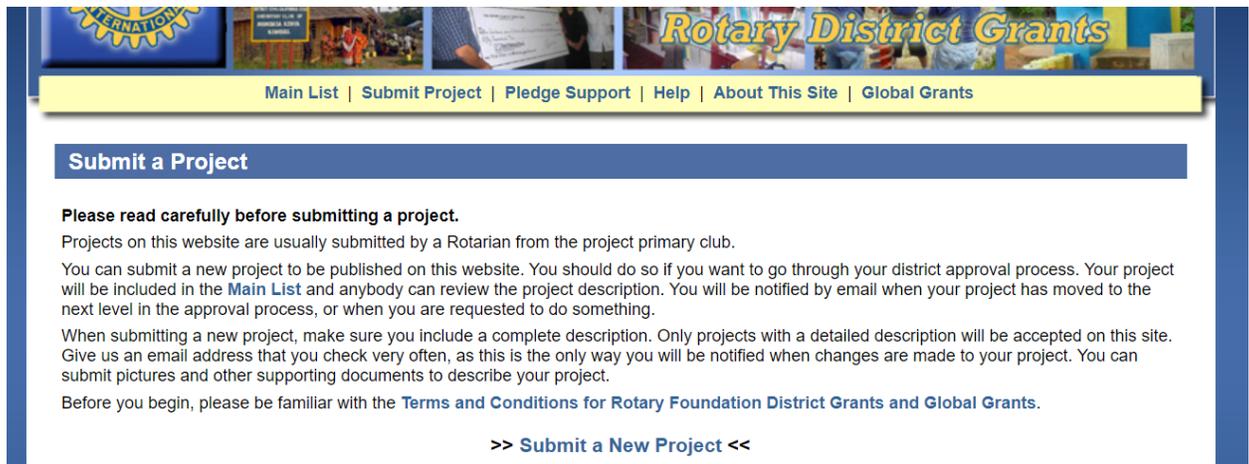
1. Go to the **Grant Information** page and click on **Grants Website (aka www.matchinggrants.org)**
2. Click on the large circle under the words **District Grants**. This screen appears:



The screenshot shows the Rotary District Grants Website interface. At the top, there is a navigation bar with links: Main List | Submit Project | Pledge Support | Help | About This Site | Global Grants. Below the navigation bar, a welcome message reads: "Welcome to the Rotary District Grants Website. Look below for a list of project. Use the search feature to find a specific project. Click on My Account to login and see your own projects." There is a search box labeled "P-" with a "Go" button and a "Rotary Year" dropdown menu set to "2021-22". Below this is a section titled "List of Projects" containing a table with columns: #, Title, Country, Location, District, Club, Amount, and Status.

#	Title	Country	Location	District	Club	Amount	Status
P-4178	Circle of Friends Grand Ball	USA	Lewisville High School	5790	Lewisville	\$1,500	Submitted
P-4177	Scholarships for HS Graduates	USA	Manteno, IL	6450	Manteno	\$2,000	Approved
P-4170	Smoke Alarms	USA	Decatur Texas	5790	Decatur	\$5,300	Signed
P-4166	Chennai Beach Cleanup	India	Chennai	5340	Del Mar-Solana Beach	\$6,085	Fully Pledged
P-4164	Furniture for Solutions of NT	USA	Denton, Texas	5790	Denton	\$1,500	Approved
P-4163	Gutter Bins for Gillette	USA	Gillette, Wyoming	5440	Gillette	\$3,541	Paid
P-4162	Peace Pavilion Improvements	USA	Steamboat Springs	5440	Steamboat Springs	\$10,000	Paid

3. Choose **Rotary Year 2022-23**
4. Click the **Submit Project** option on the yellow banner. This screen appears:



The screenshot shows the "Submit a Project" page on the Rotary District Grants Website. It features a navigation bar with links: Main List | Submit Project | Pledge Support | Help | About This Site | Global Grants. Below the navigation bar, the heading "Submit a Project" is displayed. The main content area contains instructions for submitting a project, including a warning to read carefully before submitting, details about the approval process, and a link to the Terms and Conditions for Rotary Foundation District Grants and Global Grants. At the bottom, there is a button labeled ">> Submit a New Project <<".

- Read the text and then click <<**Submit a New Project**>>. This screen appears (two screen shots were needed to display the entire screen):

[Main List](#) | [Submit Project](#) | [Pledge Support](#) | [Help](#) | [About This Site](#) | [Global Grants](#)

Your Information

This must be **YOUR name and YOUR email address** if you are not the primary contact for this project otherwise you will not be granted access to the project administration

Your Name Your Email

Submit a New Project

Project Title Rotary Year

Country Location

Areas of Focus (Check all that apply, if any)

Peacebuilding and conflict prevention Disease prevention and treatment
 Water, sanitation and hygiene Maternal and child health
 Basic education and literacy Community economic development
 The environment

Activity Type

Project Summary: Short sentence to explain the project. This project description should provide information about what activity is being funded, who is benefitting from the activity, and the name of the location of the project or activity, including the city or country. For example, "Five computers provided to schools for children in Addis Ababa, Ethiopia."

Project Description: You should include what needs have been identified, how the project will meet those needs, and the timeline for your project. Please specify what the project funds will be used for and how club members will be involved.

Project Contact Person

District Number Rotary Club of

Contact Name Email

Project Budget

Total Budget Club Contribution District Contribution (DDF)

Payment Information

This is the information to provide to your District Leadership to send the check payment after the project is approved.

Contact Phone Number Make checks payable to

Address City State Zip

Check this box to certify that this project fits within the guidelines of the Rotary Foundation Mission Statement:
The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

[Main List](#) | [Submit Project](#) | [Pledge Support](#) | [FAQs](#) | [About This Site](#) | [Global Grants](#)

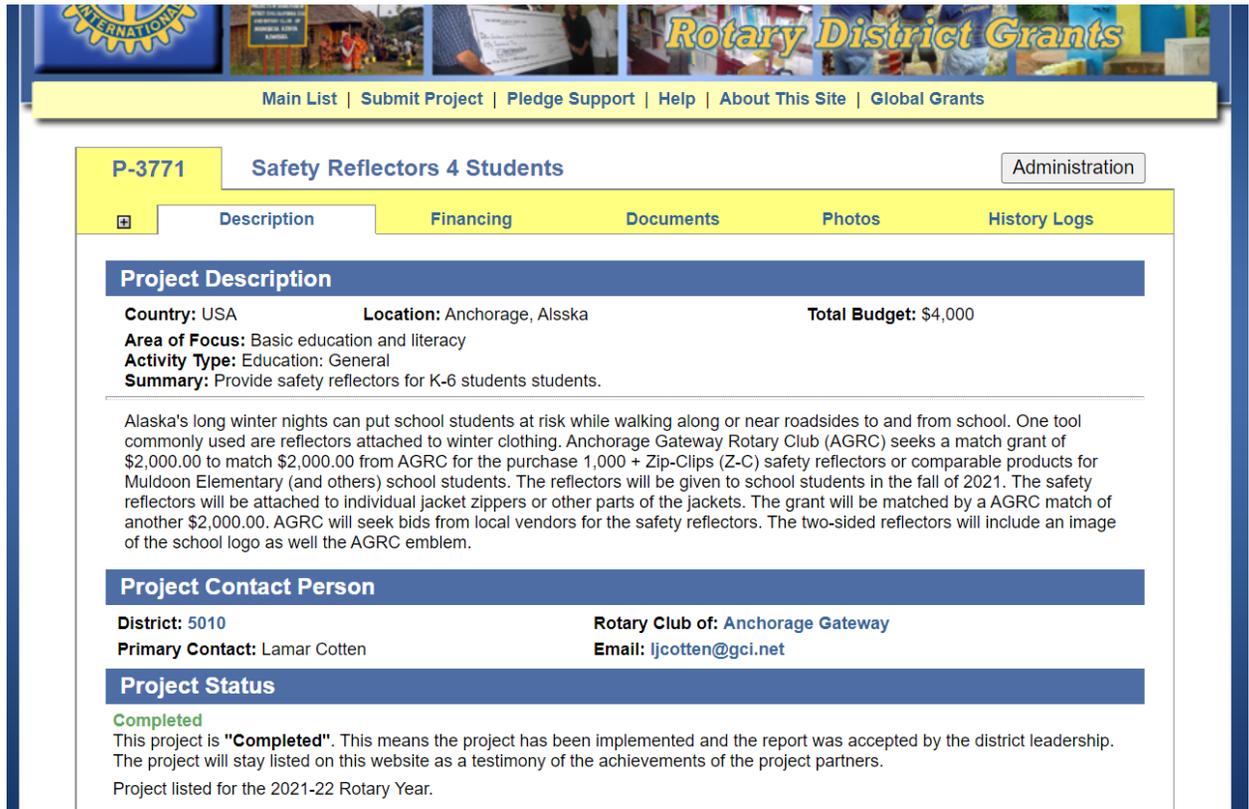
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6. Complete the application. Some pointers:
 - a. In the **Project Budget** section, **District Contribution (DDF)** cannot exceed **Club Contribution**. **Club Contribution** must match or exceed **District Contribution (DDF)**.
 - b. Double check that you chose the 2022-23 Rotary Year on the **Welcome to the Rotary District Grants Website** you landed on above.
 - c. The final report and supporting bank cancelled checks and/or invoices marked paid must be filed within two months after your project is completed, or by May 31, 2023, at the latest. District Grants cannot be extended into Rotary year 2023-24.
7. Click **Save** at the bottom of the screen. After you do this, if you need to make changes, click on the **Help** option on the yellow banner, and then click on the **QuickTips** option on the blue banner.
8. Your project is given the status **Submitted**. The Grants subcommittee team will then review it. You will be contacted if there is missing information or questions.
9. At this time the signature process is started. The person who filled out the application above, also called the primary contact, is one of the signers, and the incoming president is the other signer. If these people are one and the same, another responsible club member should sign.
10. After signature your project is given the status **Signed**.
11. The Grants subcommittee meets and reviews the applications, usually in late April. Whether a project is approved and how much DDF each District Grant will receive is based on several factors, including but not necessarily limited to:
 - a. Is the Club fully qualified?
 - b. How many people will be impacted by the proposed District Grant?
 - c. What is the impact of the proposed District Grant measured against Rotary's seven areas of focus (even though a District Grant only needs to meet TRF mission statement)?
 - d. What is the Club's track record for implementing and managing District Grants?
 - e. How much will the District Grant involve Rotarian participation?
 - f. What is the Club's contribution history to TRF?
12. Clubs are notified whether their project is approved and the amount of DDF they will receive. If a modification, usually a reduction, is made in the DDF proposed to be distributed, then if the Club agrees, the signature process is restarted.
13. The Grants subcommittee and District leaders apply to TRF for the sum of the DDF requested by Clubs. The total amount requested is called a block grant. Your DDF may be spent only after the block grant is approved by TRF. The District Grants treasurer will disburse DDF to the Clubs shortly after July 1.
14. After the DDF is disbursed, your project is given the status **Paid**.

Making updates to a District Grant Project

Please keep the Grants subcommittee team updated about your project. You can add information or specify changes to the project description by taking these steps:

1. Go to your project page, which looks like this:



The screenshot shows the Rotary District Grants website interface. At the top, there is a navigation bar with links: Main List | Submit Project | Pledge Support | Help | About This Site | Global Grants. Below this, the project ID 'P-3771' and title 'Safety Reflectors 4 Students' are displayed, along with an 'Administration' button. A tabbed interface shows 'Description' as the active tab, with other tabs for Financing, Documents, Photos, and History Logs. The 'Project Description' section includes fields for Country (USA), Location (Anchorage, Alaska), and Total Budget (\$4,000). It also lists the Area of Focus (Basic education and literacy), Activity Type (General), and Summary (Provide safety reflectors for K-6 students). A detailed paragraph describes the project's goal to provide safety reflectors to school children in Alaska. Below this, the 'Project Contact Person' section lists the District (5010), Primary Contact (Lamar Cotten), and Rotary Club (Anchorage Gateway). The 'Project Status' section indicates the project is 'Completed' and provides a brief explanation of this status.

P-3771 Safety Reflectors 4 Students Administration

Description Financing Documents Photos History Logs

Project Description

Country: USA **Location:** Anchorage, Alaska **Total Budget:** \$4,000

Area of Focus: Basic education and literacy
Activity Type: General
Summary: Provide safety reflectors for K-6 students students.

Alaska's long winter nights can put school students at risk while walking along or near roadsides to and from school. One tool commonly used are reflectors attached to winter clothing. Anchorage Gateway Rotary Club (AGRC) seeks a match grant of \$2,000.00 to match \$2,000.00 from AGRC for the purchase 1,000 + Zip-Clips (Z-C) safety reflectors or comparable products for Muldoon Elementary (and others) school students. The reflectors will be given to school students in the fall of 2021. The safety reflectors will be attached to individual jacket zippers or other parts of the jackets. The grant will be matched by a AGRC match of another \$2,000.00. AGRC will seek bids from local vendors for the safety reflectors. The two-sided reflectors will include an image of the school logo as well the AGRC emblem.

Project Contact Person

District: 5010 **Rotary Club of:** Anchorage Gateway
Primary Contact: Lamar Cotten **Email:** ljcotten@gci.net

Project Status

Completed
This project is "**Completed**". This means the project has been implemented and the report was accepted by the district leadership. The project will stay listed on this website as a testimony of the achievements of the project partners.
Project listed for the 2021-22 Rotary Year.

2. Be sure you are on the **Description** tab.
3. Click the **Administration** button in the upper right section of the screen.

- Then click on the **Edit Project Page** button and this screen appears:

Update Project P-3771

This project has already been submitted for signature. Only some of the fields can be edited.

Project Title	Safety Reflectors 4 Students	Rotary Year	2021-22
Country	USA	Location	Anchorage, Alaska

Areas of Focus (Check all that apply)

<input type="checkbox"/> Peacebuilding and conflict prevention	<input type="checkbox"/> Disease prevention and treatment
<input type="checkbox"/> Water, sanitation and hygiene	<input type="checkbox"/> Maternal and child health
<input checked="" type="checkbox"/> Basic education and literacy	<input type="checkbox"/> Community economic development

Activity Type Education: General

Project Summary: Provide safety reflectors for K-6 students students.

Project Description:
 Alaska's long winter nights can put school students at risk while walking along or near roadsides to and from school. One tool commonly used are reflectors attached to winter clothing. Anchorage Gateway Rotary Club (AGRC) seeks a match grant of \$2,000.00 to match \$2,000.00 from AGRC for the purchase 1,000 + Zip-Clips (Z-C) safety reflectors or comparable products for Muldoon Elementary (and others) school students. The reflectors will be given to school students in the fall of 2021. The safety reflectors will be attached to individual jacket zippers or other parts of the jackets. The grant will be matched by a AGRC match of another \$2,000.00. AGRC will seek bids from local vendors for the safety reflectors. The two-sided reflectors will include an image of the school logo as well the AGRC emblem.

Addendum to Project Description: Use this field to add some information or specify changes to the project description after the project has been submitted for signatures. This will be added on the project page below the project description.

Project Contact Person

District Number	5010	Rotary Club of	Anchorage Gateway
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- Note that each of the five tabs has a screen “behind” it which appear when you click the **Administration** button. For instance, the screen “behind” the **Documents** tab allows you to upload documents, and the screen “behind” the **Photos** tab allows you to upload photos. Please use these functions to better display your project.
- Files uploaded to the **Documents** tab must be in PDF format. Files uploaded to the **Photos** tab do not have to be in PDF format.
- The **History Logs** tab is used to add significant information about the grant.
- If there are no updates to your project page for 6 months, you will receive an email from the Grants Website inquiring of the status. If you receive this email, please take the time to review the progress of your project, add photos or documents, a **History Logs** entry, as appropriate.
- The Grants Website is not as smooth as, say, the Amazon website (obviously). It does work, but it has a “personality”. For instance, when you upload a file to the **Documents** tab, the files may not show up right away. Please wait at least a day and try again. If your files still do not show up after a couple of attempts, contact the Grants subcommittee!

Preparing the Final Report

Once your project is completed, please upload all your final documents to the **Documents** tab at the same time that you fill out your final report. You may also upload a final batch of photos to the **Photos** tab. You must at least upload to the **Documents** tab the bank cancelled checks and/or invoices marked paid, or other similar proof of payment for all the DDF received and all the club contribution you made.

When uploading bank cancelled checks, or other documents with personal information like a bank account number, keep in mind that much of the Grants Website is open to the public. The strongest steps to take to protect personal information is to first redact the personal information from each document, then click the Restricted Access box when you upload.

The final report and final documentation must be completed within two months of project completion, but no later than May 31, 2021. To fill out the final report:

1. Go to the **Description** tab, then click the **Administration** button, and this screen appears:

The screenshot shows a web interface for a project titled "Home Fire Safety" with ID "P-3794". At the top right is a "Back to Project" button. Below the header is a navigation bar with tabs: "Description" (selected), "Financing", "Documents", "Photos", and "History Logs".

The main content area has a blue header "Update Project Information" and a text prompt: "Click the button on the right to make changes to the basic project information." with an "Edit Project Page" button.

Below that is a blue header "Project Status Information" followed by a paragraph: "Your project is **'Paid'**. This means that the check for the DDF payment has been issued. Please make the necessary arrangements for the project implementation. Please keep all receipts of project expenditure, and upload all the implementation information on the website as supporting documents. The website is used as a centralized repository for stewardship information. Please upload the final report when this project is completed."

A table shows signatory information:

Signatory	Email	Sign Date
* Kalie Harrison	kalie.harrison@gmail.com	Signed on 23-Apr-21
Larry Daniels	lkdanielsak@outlook.com	Signed on 24-Apr-21

At the bottom, a "Project Contact" section contains a paragraph: "Click the 'Final Report' button to fill in the final report. You can partially fill and save the report and get back to it later. **Please make sure you upload all receipts and supporting documents on this website before submitting the final report for signatures.** After submission the district leadership will review the online report and documents and will only change the project status to 'Completed' if all the information has been provided." and a "Final Report" button.

2. Click the **Final Report** button, and this screen appears (two screen shots were needed to display the entire screen):

Rotary District Grants

Main List | Submit Project | Pledge Support | Help | About This Site | Global Grants

Rotary Club: Girdwood
Project Title: Home Fire Safety

Project Description

1. Describe the project. What was done, when and where did project activities take place?

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

7. Income

Sources of Income	Amount
1. District Grant funds received from District 5010	<input type="text" value="500"/>
2. Rotary Club Contribution: Girdwood	<input type="text" value="500"/>
Other funding	<input type="text"/>
Total Project Income	\$1000

8. Expenditures

If you need additional lines for the budget items, save the form and come back to it, you will have 5 new blank lines.

Budget Items	Name of Supplier/Vendor	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Project Expenditures		\$0

District must retain receipts of all expenditures for at least five years. Please scan and upload to the project's "Documents" tab all invoices (be sure they are marked "paid"), receipts and/or copies of checks for the full amount of the project budget.

Main List | Submit Project | Pledge Support | FAQs | About This Site | Global Grants

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3. Complete the final report. Some pointers:
 - a. Please be sure to answer all the questions in paragraphs 1 – 6.
 - b. The Grants Website fills in the DDF and club contribution for you.
 - c. Be sure to fill out the Expenditures section. Often disbursements of grant funds involved only a few checks. In that case, the **Budget Items** column can list what the each check paid, the **Name of Supplier/Vendor** column will list the payee on each check, and the **Amount** column is the amount of each check.
 - d. If your project involved contributing money and Rotarian participation to a larger project (for instance, a city is upgrading its tennis courts and your cash contribution is only a small part of a larger budget), only report the disbursement of your DDF and your club contribution.
 - e. If more than one club member needs to review the final report, click **Save Draft**. If the final report is completed, then click **Save and Send for Signatures**, which will trigger the same signature process we saw when signing the Memorandum of Understanding (aka MOU).
 - f. The Grants subcommittee team will review the final report, which now has a status of **Reported**.
 - g. If the final report is not ready to approve, the Grants subcommittee team will be in touch. The signature process may have to be restarted, if for instance the final report is not completely filled out (usually paragraphs 1-6 is not completely answered or the **Expenditures** section was not filled out). In other cases, if for instance bank cancelled checks and/or invoices marked paid have not been uploaded to the **Documents** tab, the final report can be approved after that task is done.

The Grants subcommittee team wishes you a fun and rewarding District Grant experience!