DISTRICT 5390

DISTRICT GRANT OVERVIEW

Rotary

NEW THIS YEAR (2020-21)

- Travel grants: Prior to travel, must provide TRF with:
  - Traveler Names
  - Itinerary
- Travel currently restricted until Rotary authorizes (see website to verify your country is listed as authorized https://my.rotary.org/en/document/travel-ban-list)
- New Global Grant World Match
  - No longer matching club cash (was 0.5:1)
  - Only DDF 1:1

TRF AREAS OF FOCUS

TRF & RI Areas of Focus

- Disease Prevention & Treatment
- Maternal & Child Health
- Water, Sanitation & Hygiene
- Basic Education & Literacy
- Community Economic Development
- Peacebuilding & Conflict Prevention
- Supporting the Environment (2021)

ONLINE GRANT APPLICATION PROCESS

Online Club Qualification

Electronic Signatures

Online Applications

Online Notifications

Online Document Storage

One place for all things Grant Related

MONTANAROTARY.ORG

WELCOME TO ROTARY DISTRICT 5390

Rotary

DISTRICT GOVERNOR 2020-21

SANDY CARLSON

Rotary Club of Kalispell Daybreak

Immediate Past District Governor, Sandy Wong, Rotary Club of Billings
District Governor Elect (DGE), Michael Mayott, Rotary Club of Billings
District Governor Nominee (DGN), Barrie Matthews, Rotary Club of Miles City

DG Visit Protocol

DISTRICT RESOURCES

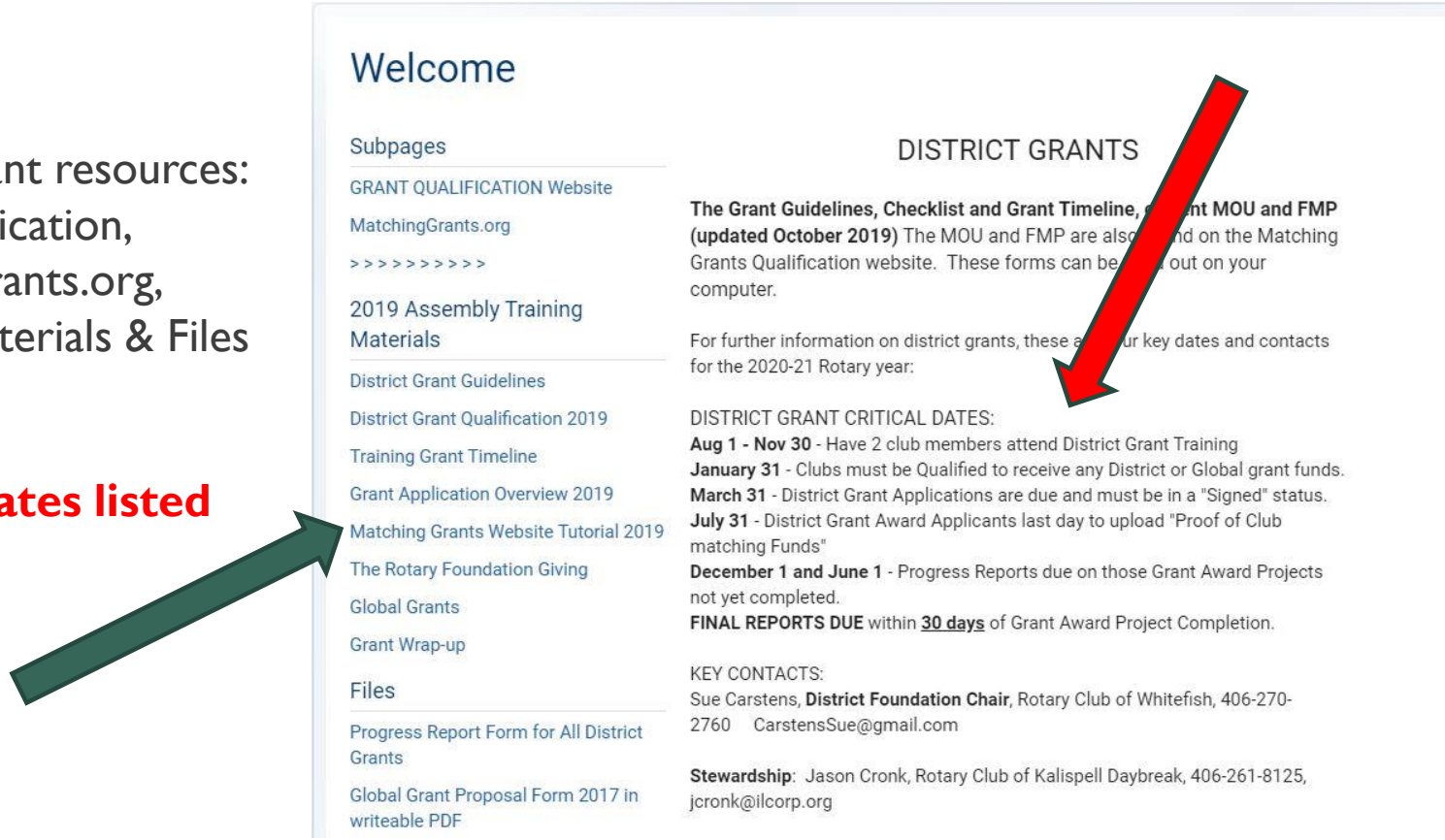
DISTRICT GRANT INFORMATION

People of Action Templates

District Leaders Contact Information

DISTRICT GRANTS WEBSITE

- Links to grant resources: Club Qualification, MatchingGrants.org, Training Materials & Files
- **Critical Dates listed**



DISTRICT GRANTS WEBSITE

- Links to grant files
- **List of Grant Committee Chairs**

Files

- Progress Report Form for All District Grants
- Global Grant Proposal Form 2017 in writeable PDF
- Grant Timeline & Checklist
- Guidelines for District Grants, 2019
- Overview for District Grants
- MOU - Club Memorandum of Understanding Application & Addendum
- FMP - Club Financial Management Plan Application
- District Grant Application Worksheet
- Grant Budget Sample
- Stewardship Procedures Manual
- 2018-19 District Grants

Sue Carstens, **District Foundation Chair**, Rotary Club of Whitefish,
2760 CarstensSue@gmail.com

Stewardship: Jason Cronk, Rotary Club of Kalispell Daybreak, 40
jcronk@ilcorp.org

Audit: Duane Johnson, Rotary Club of Bigfork, 406-261-5911
newcropper@outlook.com

Grant Selection: Sue Carstens, Rotary Club of Whitefish, 406-270
CarstensSue@gmail.com

Please be sure you are using the most current forms and info
applying for District Grants.

District Grant Applications are only accepted online at Matchi
The Progress Report form is found in the Download tab on th
or in the Download Files on the left side of this webpage. The
Report must be completed on MatchingGrants.org.

If you use the **Rotary District 5390 Foundation** to deposit mo
projects, the Foundation tax ID is 75-3108138.

PLEASE REVIEW THE FOLLOWING DOCUMENTS PRIOR TO SUBMITTING GRANTS

- Global Grant proposal form
- District Grant timeline and checklist
- District 5390 Grant guidelines & Overview
- MOU & FMP
- District grant application worksheet
- Grant budget sample
- Progress report form

DISTRICT GRANT PROCESS

- Grant Projects must be in 'Signed' status to be considered for Grant Awards by March 31st
- Club's can start spending funds only after Grant project has been "Approved"
- Clubs must upload copies of all receipts related to grant expenditures to the Document tab with the online Final Report
- Use Current Rotary Year (2020-21) for Club Qualification Year and select Next Rotary Year (2021-22) for Club Project Year

- All grant applications must be submitted online at www.MatchingGrants.org
- No paper forms or emailed documents will be accepted
- Final Grant Report is an online document. Only upload supporting documentation, receipts, and photos

DISTRICT GRANT PROCESS (CONT'D)

- Use History Log Entries to update when a there is a significant change in the project to alert District and project partners. Do not use for email messaging or comments.
- Grant Application Worksheet available on the District website for gathering data for input into online application
- Grants may be requested for $500-$2,500
- All District Grants are expected to be used within the Club Year
- TRF District Grant Funds must be used within 24 months or returned to TRF
- District will use all Progress and Final Reports to report to TRF on the use of Grant Funds

HOW DDF IS AWARDED

- To encourage all clubs to apply for District Grants, only the first $2,500 will be funded unless there is available DDF after reviewing all Grant requests submitted
- First round reviewed are the First Priority Grant Requests, then any additional requests
- Any additional funds available will be distributed evenly to those clubs requesting >$2,500

SELECTION PROCESS

- In last several years, no 1st priority grant request has not been at least partially funded if it met District and RI criteria
- Any sitting member abstains from grant requests from their Club

GRANT SELECTION RECOMMENDATIONS

- Designate a club member as 'Grants Chairperson'
- Rotary Club must be lead on the project
- If project is a component of larger, partnered venture-explain that and outline what portion your Rotary Club will take 'Ownership' of
- Club matching funds must be paid from a Club Financial Account, upload proof in the form of a bank statement after grant has been awarded and check "Restricted" box
- Project must fall into one of 6 Areas of Service (7 Areas of Service in 2021)
- Review 'Areas of Focus Policy Statements' Document
- District requires both Club President and Project Lead to electronically sign off on the club project
- Avoid even the appearance of 'Conflicts of Interest' with Grant Funds when hiring contractors, purchasing materials, etc.

GRANT SELECTION RECOMMENDATIONS (CONT'D)

- Project Description: In your project answer the following questions:
  - what needs have been identified?
  - how the project will meet those needs?
  - what is the timeline for your project?
  - specify what the project funds will be used for
  - how many and how club members will be involved?

ROTARY CLUB PARTICIPATION

Mandatory

Rotary fellowship derived through working together

Keep track of and assign monetary value to Rotarian and Volunteer hours

Assign monetary value to in-kind donations of service, materials, etc.

GRANT PROJECT BUDGET

Budget must be uploaded to be a considered a “signed” project

Final Grant Report Receipts need to cover items identified in project budget

Include Rotarian hours and in kind donations

SAMPLE: Rotary District Grant • Project Budget

To serve as only a sample & may need to be expanded/altered for more complicated expenses or with more funding partners

Mid-Town Rotary Club • Sunshine Park Improvement Project

EXPENSES

	To Be Paid: From Grant Funds	From Club Funds	(Non-Cash) In-Kind	
Park & Playground Equipment:				
Swing Set		$1250.		
Slide		950.		
Picnic tables (Two)		850.		
Contracted Concrete footings& Walkways	$2500.			
Travel				
Other				
Labor: Assemble & Install Equip & Tables 25 hours @ $20/ hr.			$500.	
Totals:	$2500.	$3050.	$500.	**$6050.**

REVENUE

Mid-Town Rotary Club Funds:				
Membership dues & contributions		$2550.		
Family Foundation gift		500.		
Rotary District Grant Funds Requested	**$2500.**			
Mid-Town Rotary Club members donated labor			$500.	
Totals:	$2500	$3050.	$500.	**$6050.**

REMINDERS

Review the online documents and presentations

Add anyone that needs to be informed to the grant email distribution list

Detailed budgets are required

Timely progress reporting is essential!!

DISTRICT 5390 MATCHING GRANTS

Thank you!

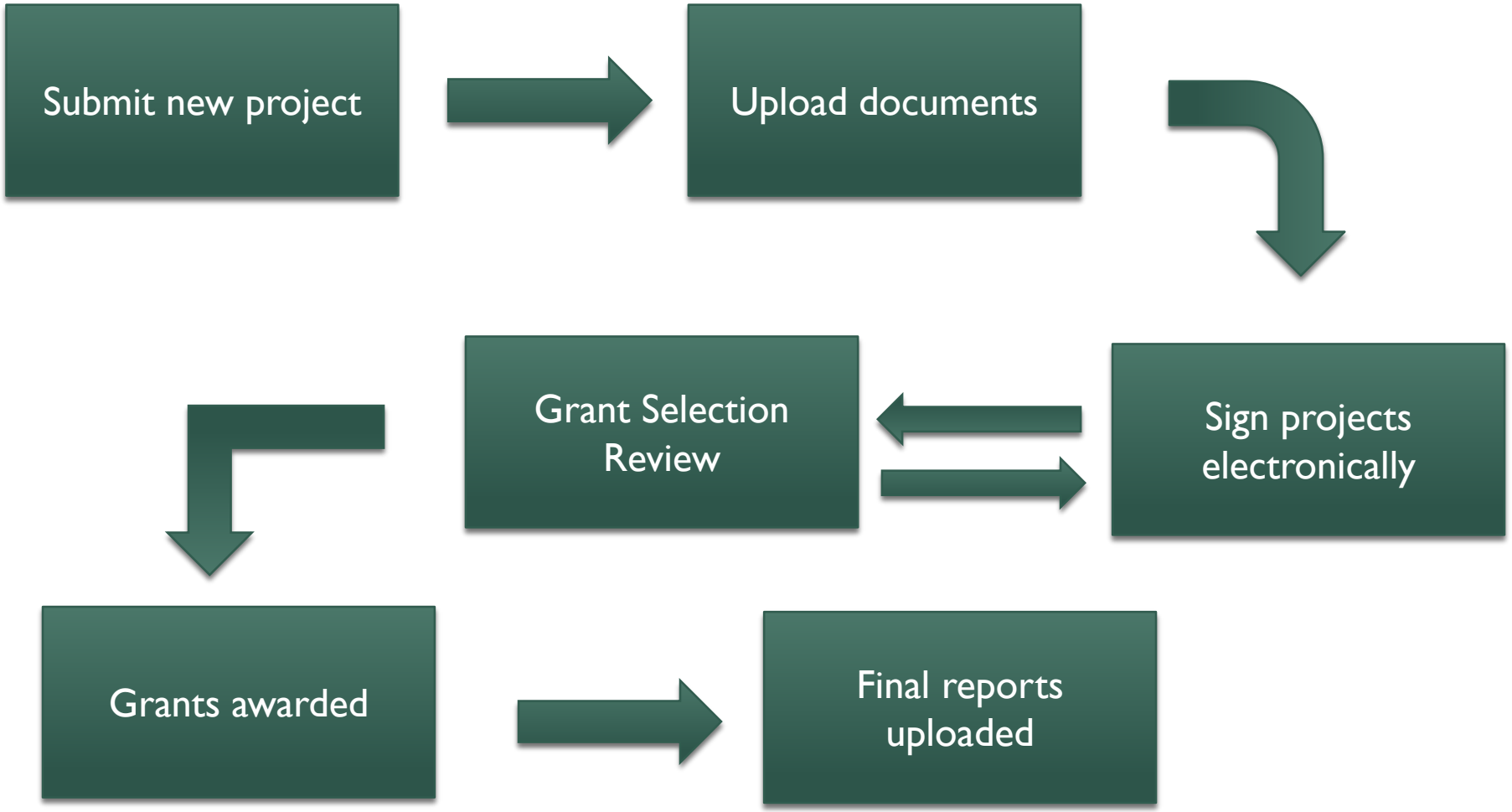
Questions?

Rotary

GRANT APPLICATION PROCESS

DISTRICT 5390

STEPS TO APPLYING FOR DDR



SUBMITTING A NEW PROJECT

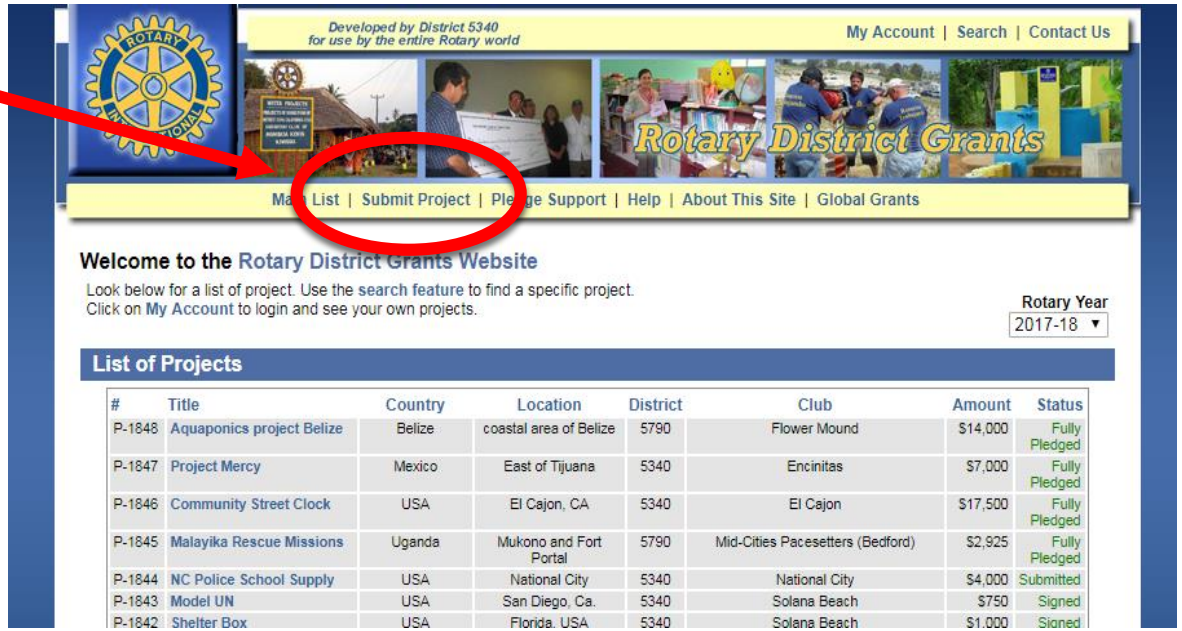
MatchingGrants.org

- From homepage
  - Select (click) on District Grants

SUBMITTING A NEW PROJECT

District Grants Website

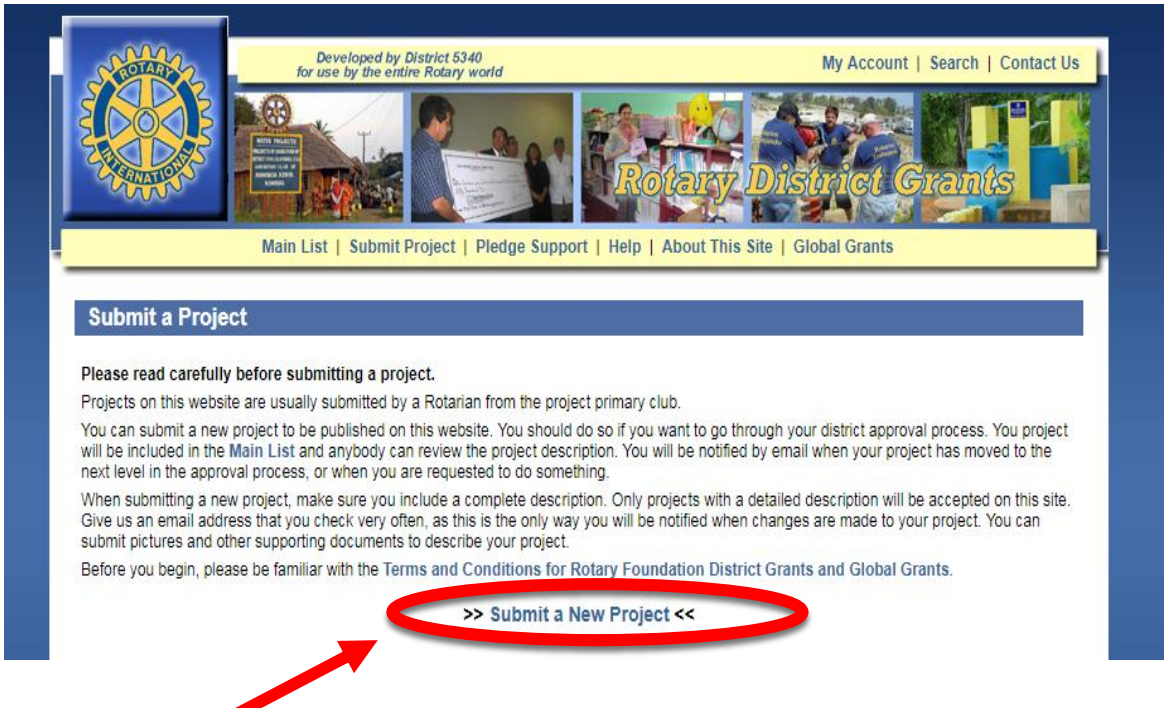
- Select (click) submit project



SUBMITTING A NEW PROJECT

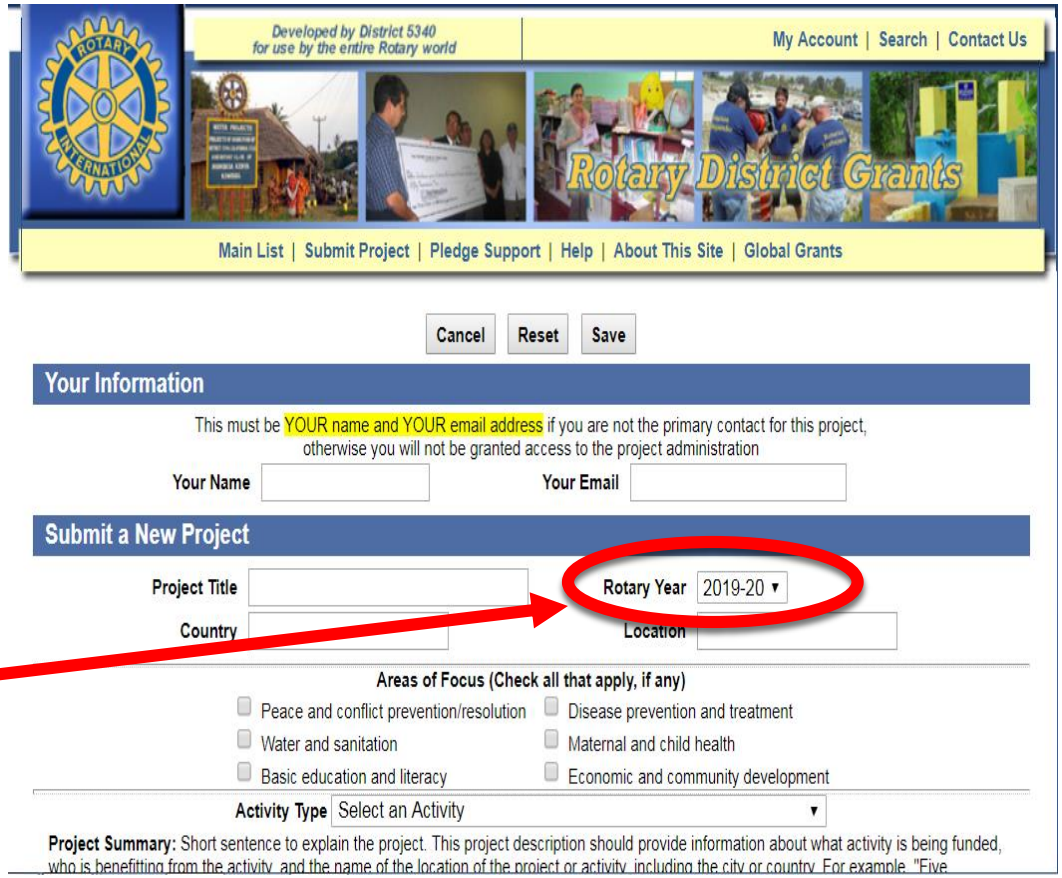
Disclaimer

- Read disclaimer and review TRF Grant Terms & Conditions
- Select (click) "Submit a New Project"



SUBMITTING A NEW PROJECT

- Project form
- Fill in project information
  - Title
  - Rotary Year
  - Country –
    - USA or other
  - Location
    - Town where the project will take place
- Make sure to select the correct Rotary year (2021-22)



SUBMITTING A NEW PROJECT

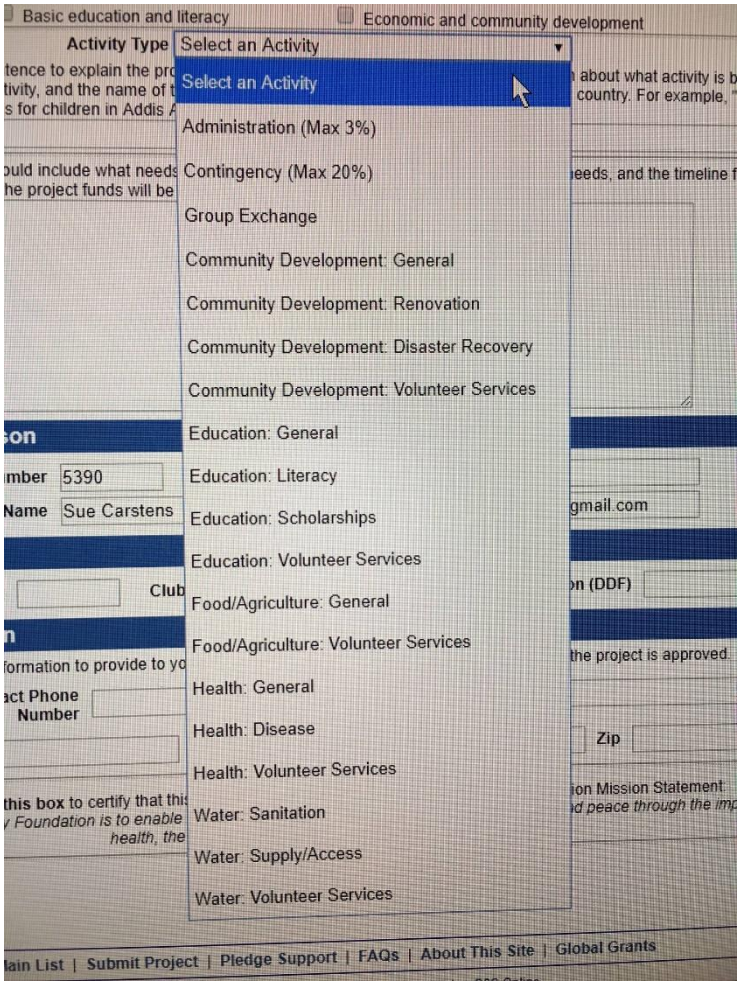
Project form

- Fill in project information
  - Area of Focus
  - Activity Type

SUBMITTING A NEW PROJECT

Project form

- Fill in project information
  - Activity type

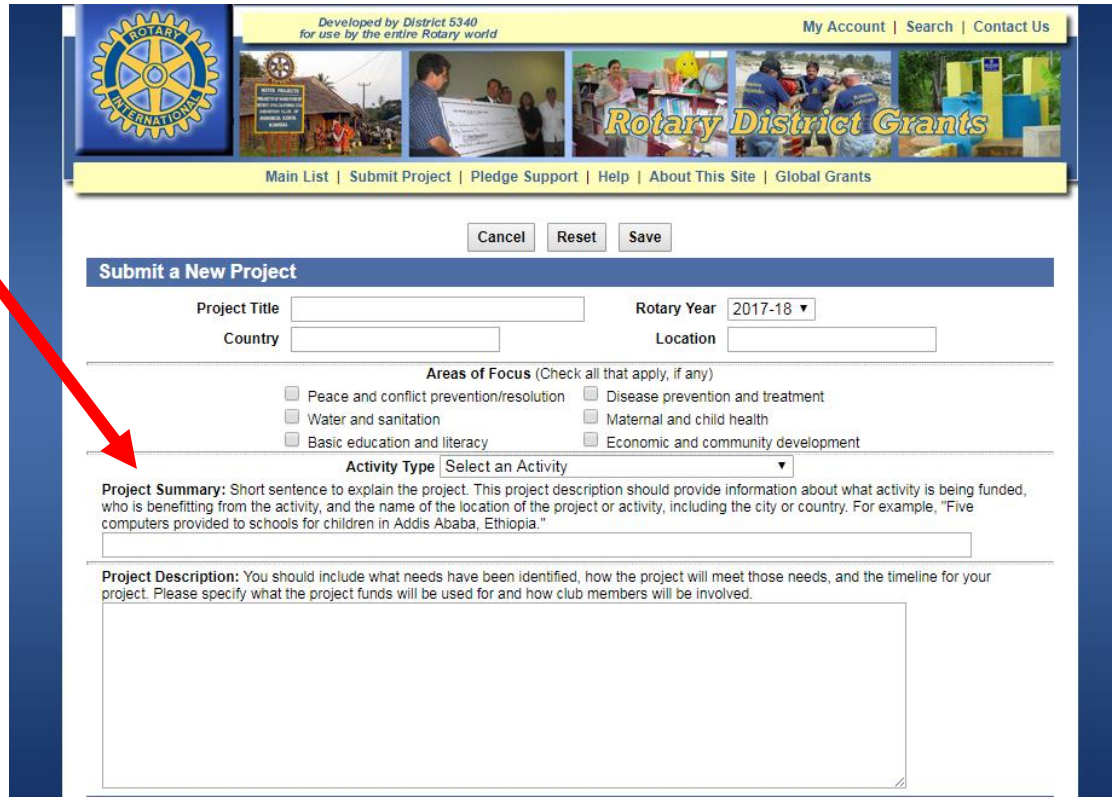


SUBMITTING A NEW PROJECT

Project form

- Fill in project information
  - Project Summary – Answer 3 questions:
    - What are you doing?
    - Who is doing this?
    - Who benefits?

Example: *Replacement of Musical Instruments in Bigfork Schools' Band inventory. Instruments selected, procured and distributed by 37 members of the Rotary Club of Bigfork. Instruments will be utilized by 110+ students in grades 6-12.*



SUBMITTING A NEW PROJECT

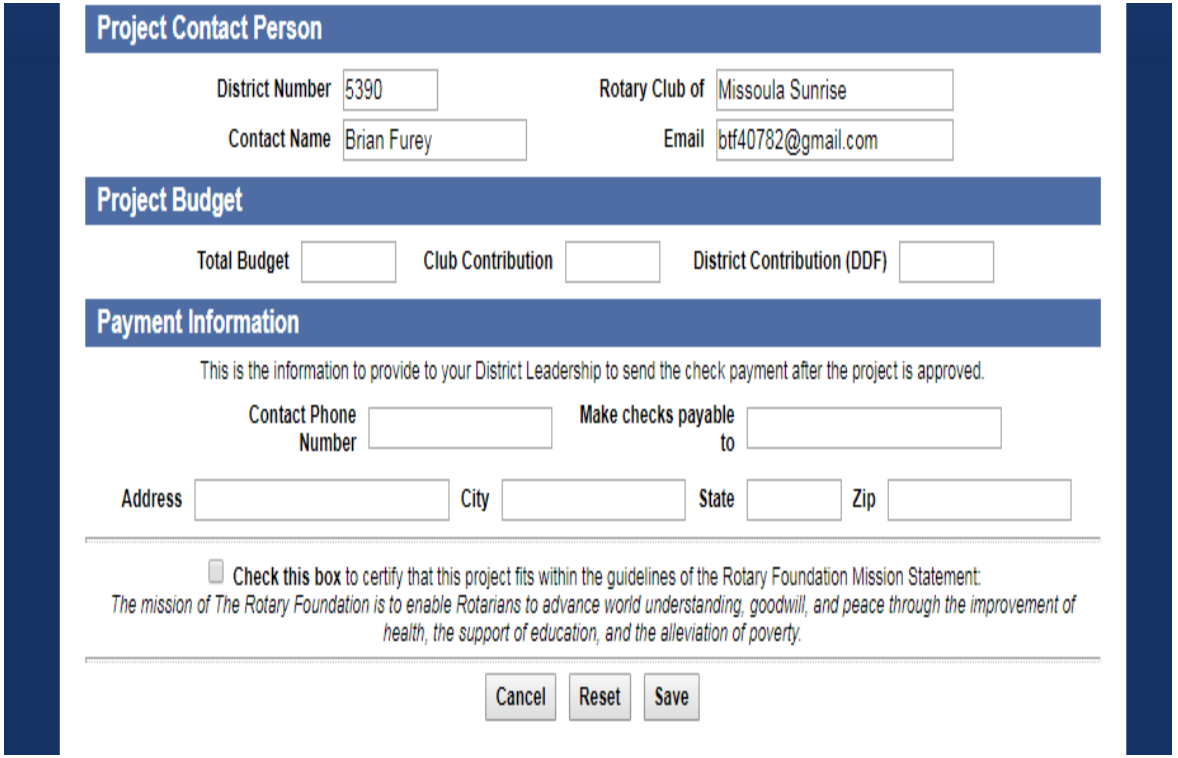
Project form

- Fill in project description

SUBMITTING A NEW PROJECT

Project form

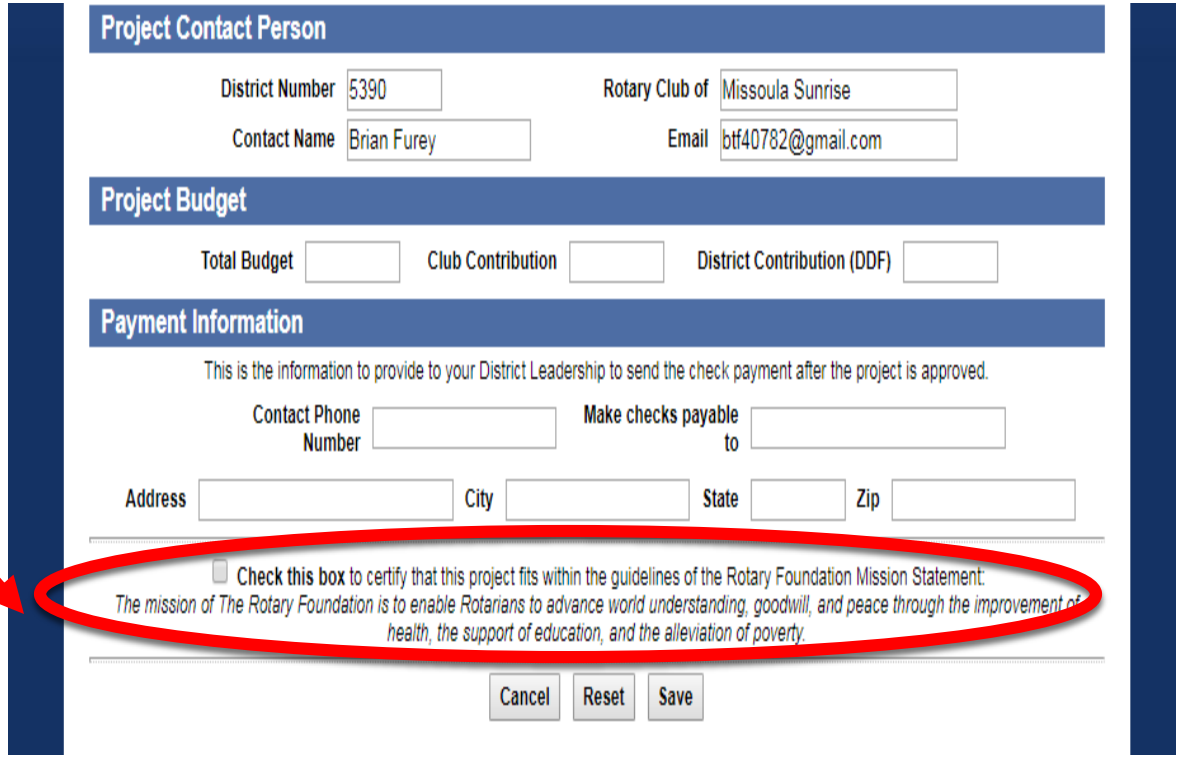
- Fill in project information
  - Project contact info
  - Budget (simple)
  - Payment info



SUBMITTING A NEW PROJECT

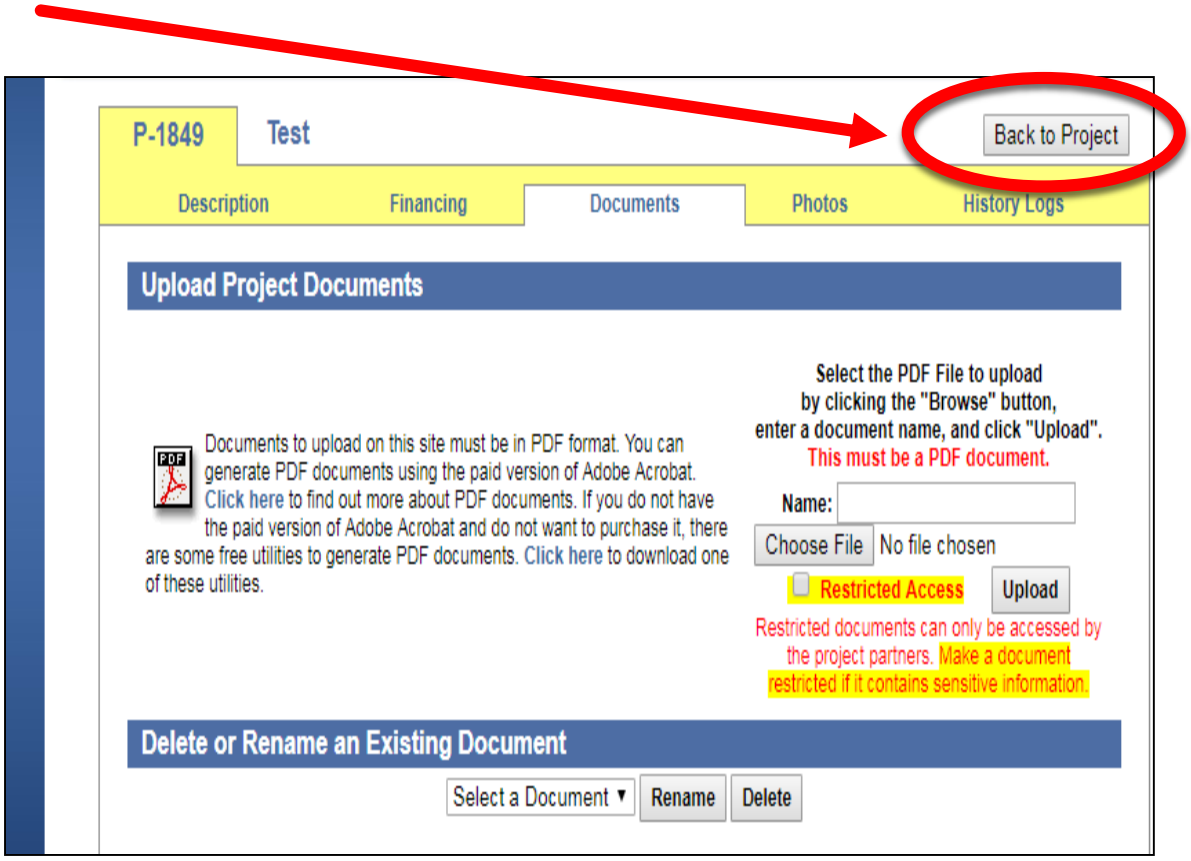
Project form

- Fill in project information
  - Project contact info
  - Budget (simple)
  - Payment info
- Check box certifying project fits grant guidelines



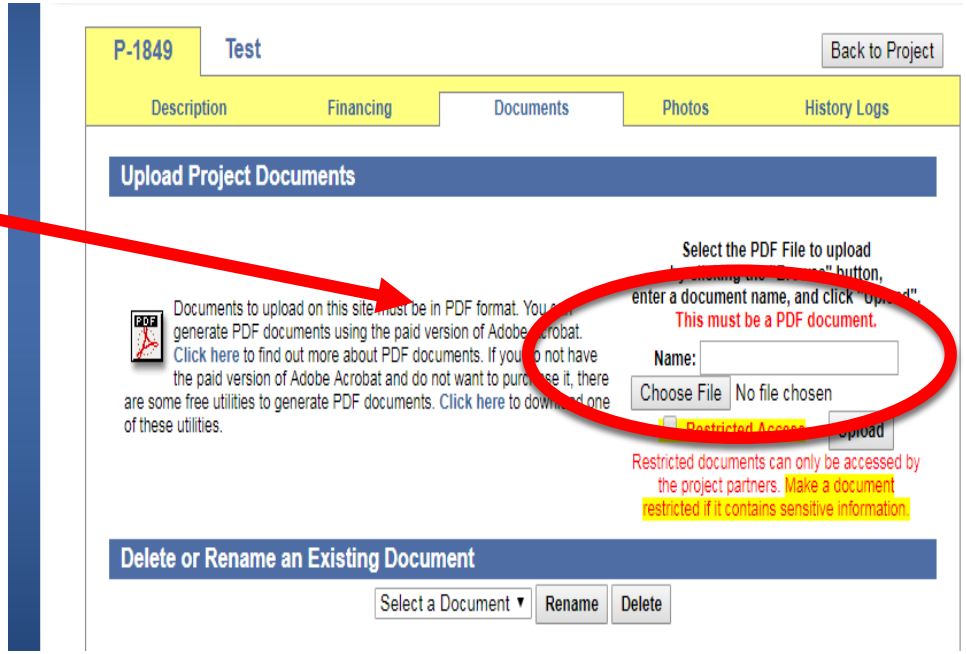
NAVIGATING THE PROJECT

- Toggle between Project and Administration views
- Project is for viewing and entering initial project descriptions
- Administrative is for processing of the grant project such as requesting Signatures, adding documents/photos or adding Project Partners



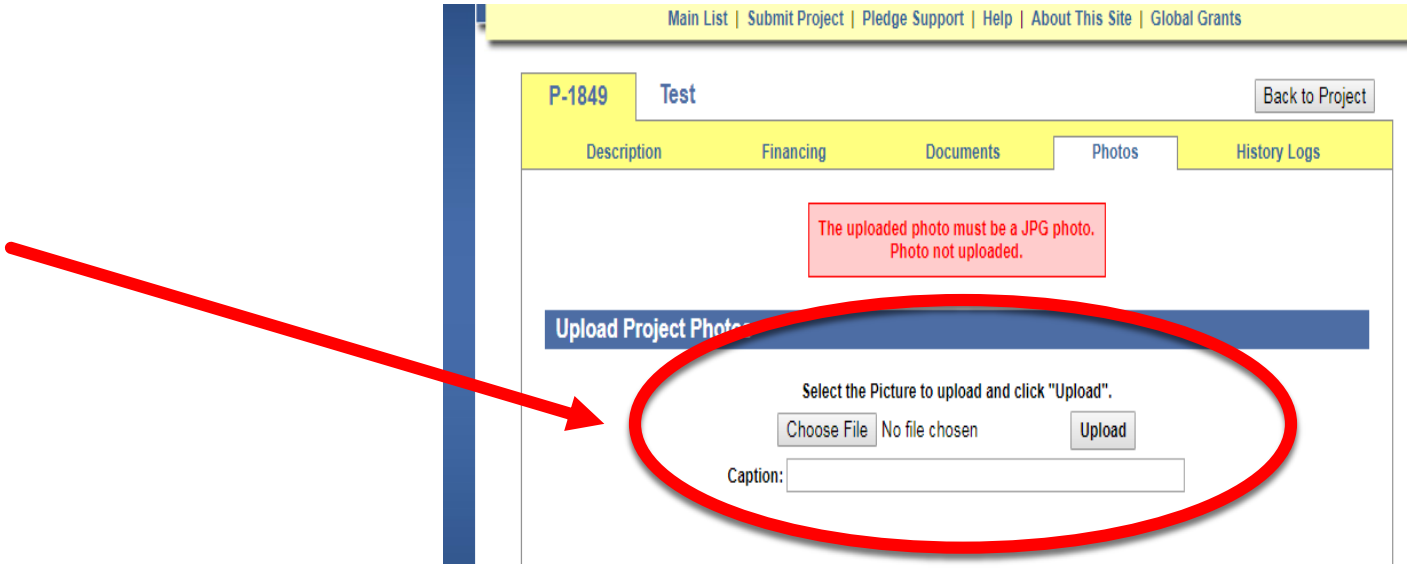
UPLOADING DOCUMENTS AND PHOTOS

- Document uploading – click "Choose File" button. Dialogue box will open to select file
- Click "Upload"
- Can Delete or Rename an Existing Document
- Restricted Access
- Documents must be PDF format!
  - Detailed budget
  - Bids
  - Detailed description
  - Designs
  - Proof of Matching Funds
  - Progress Reports!!



UPLOADING DOCUMENTS & PHOTOS

- Click "Choose File" button. Dialogue box will open to select file.
- Optional: Add a caption
- Click "Upload"
- All photos must be in a JPG format



UPLOADING BUDGET DOCUMENTATION

- Must provide uploaded detailed budget
- Budget sample found in Files listing under Grant Information
  - www.montanarotary.com
- Must be in PDF format
- Refresh screen after upload!

SAMPLE: Rotary District Grant • Project Budget

To serve as only a sample & may need to be expanded/altered for more complicated expenses or with more funding partners

Mid-Town Rotary Club • Sunshine Park Improvement Project

EXPENSES	To Be Paid: From Grant Funds	From Club Funds	(Non-Cash) In-Kind	
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Swing Set		$1250.		
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Picnic tables (Two)		850.		
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REVENUE				
Mid-Town Rotary Club Funds:				
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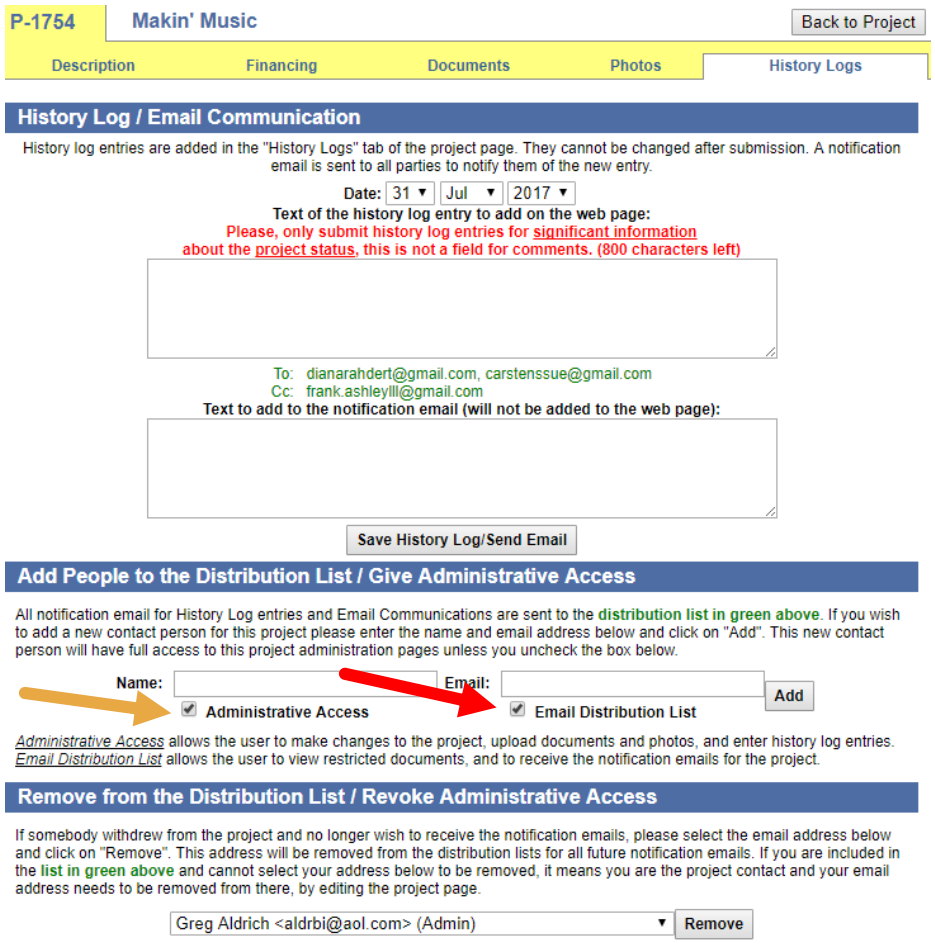
Family Foundation gift		500.		
Rotary District Grant Funds Requested	**$2500.**			
Mid-Town Rotary Club members donated labor			$500.	
Totals:	$2500	$3050.	$500.	**$6050.**

ADDING OTHERS TO YOUR PROJECT

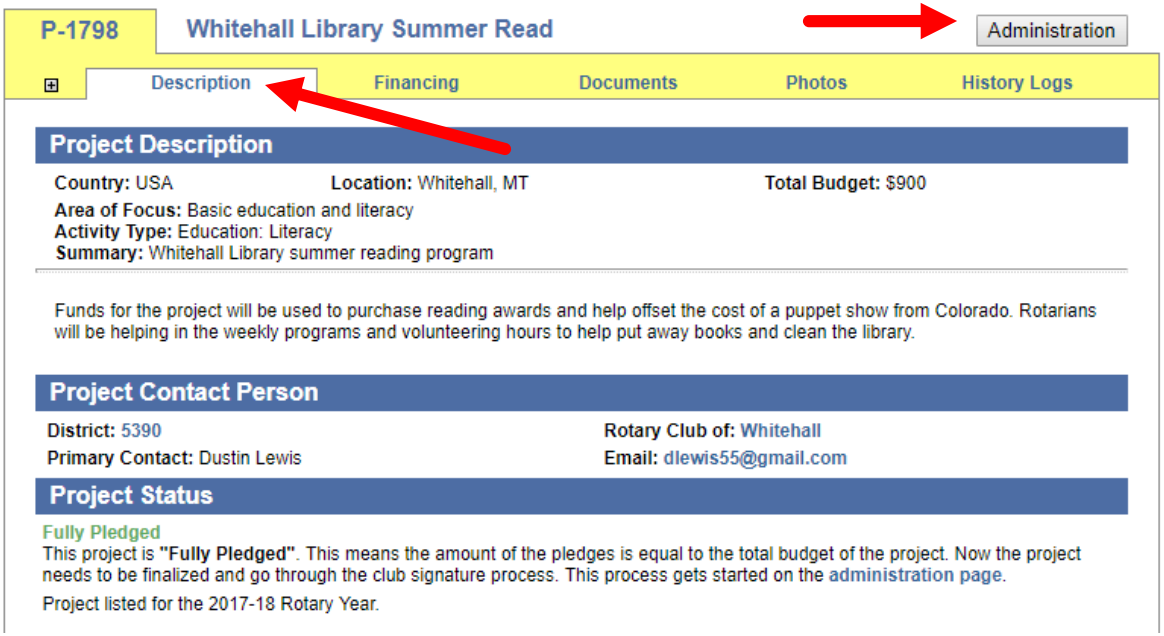
- Add Project Partner for project editing and uploading of documents or pictures (check "Administrative Access")
- Add any additional Project Partner just to receive updates on project (check "Email Distribution List")
- Or BOTH!
- Don't forget to add your club PE as they will need to be a Signatory on this project



SIGNING THE GRANT APPLICATION

Start the Signature Process

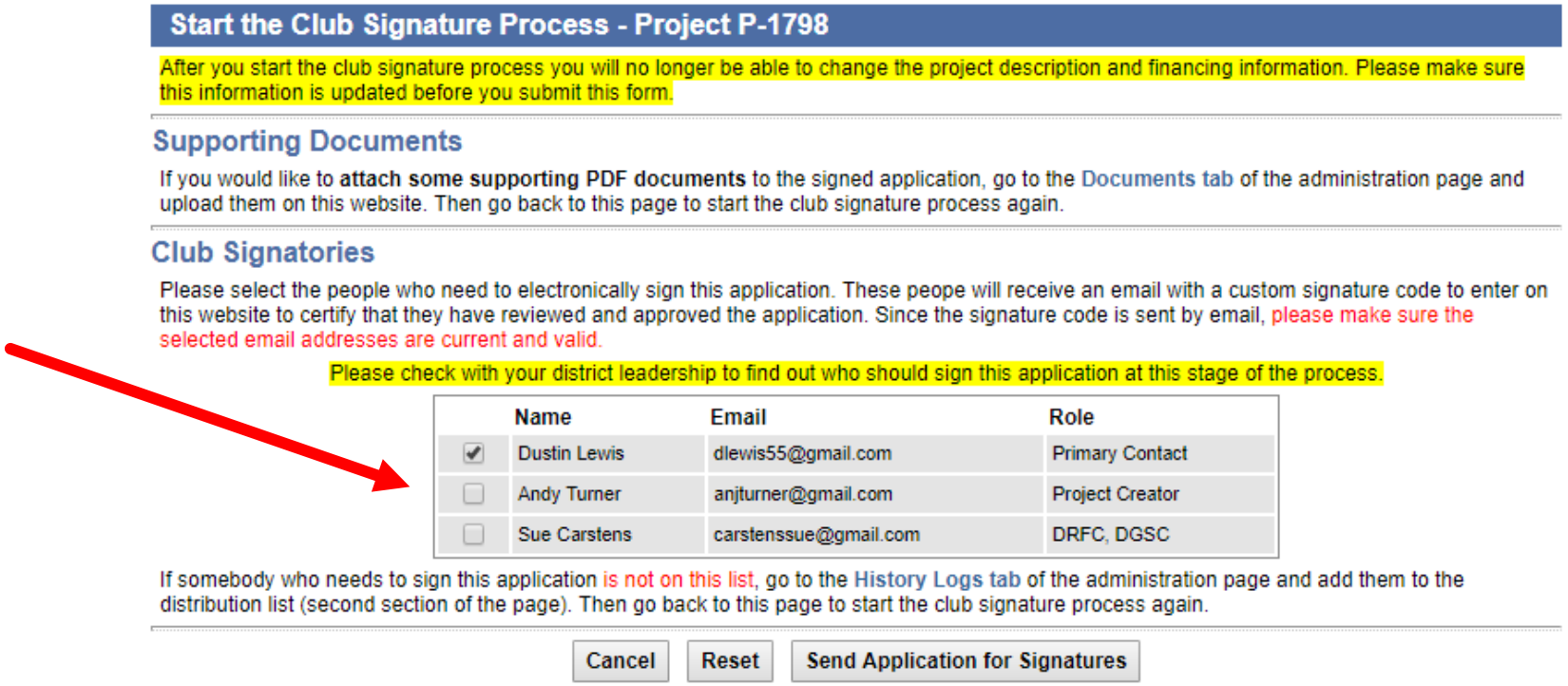
- Project must be in "Signed" status for Grant Committee to include in Review Process (Mar 31st is Final Date for Grant Applications)
- Open Project page, go to Description Tab and click on "Administration"
- Click "Start Club Signature Process"



SIGNING THE GRANT APPLICATION

Signature process

- Check the names of your club PE and Project Contact (additional if wanted)
- Then click "Send Application for Signatures"



Start the Club Signature Process - Project P-1798

After you start the club signature process you will no longer be able to change the project description and financing information. Please make sure this information is updated before you submit this form.

Supporting Documents

If you would like to **attach some supporting PDF documents** to the signed application, go to the Documents tab of the administration page and upload them on this website. Then go back to this page to start the club signature process again.

Club Signatories

Please select the people who need to electronically sign this application. These peope will receive an email with a custom signature code to enter on this website to certify that they have reviewed and approved the application. Since the signature code is sent by email, please make sure the selected email addresses are current and valid.

Please check with your district leadership to find out who should sign this application at this stage of the process.

	Name	Email	Role
☑	Dustin Lewis	dlewis55@gmail.com	Primary Contact
☐	Andy Turner	anjturner@gmail.com	Project Creator
☐	Sue Carstens	carstenssue@gmail.com	DRFC, DGSC

If somebody who needs to sign this application is not on this list, go to the History Logs tab of the administration page and add them to the distribution list (second section of the page). Then go back to this page to start the club signature process again.

Cancel | Reset | Send Application for Signatures

SIGNING THE GRANT APPLICATION

Email Sent to Signatory

Rotary District Grants Website
to me

Dear Sue Carstens,

This project was sent to you for review and digital signature. Some action from you is required to have the project move through the approval process.

Instructions: Please review the project below and the attached document. If you agree to digitally sign this application, please go to the following address and enter this custom signature key:

www.MatchingGrants.org/district/sgn_sign.cgi?project=1756&signatory=4874
Signature key: 3313

You will be asked to accept the Terms and Conditions for District 5390 (also attached to this email).

Project P-1756 - Skating Rink Liner Project

Project Description

Country: USA **Location:** Townsend, MT **Total Budget:** $3,692

Area of Focus: Economic and community development

Activity Type: Community Development: General

Summary: Rotary Club of Townsend will provide a new liner and set up the Community skating rink. 10 Club members will participate in the project which is utilized by 250-300 children per week.

Primary Contact: Patrick Plantenberg **Email:** m2andp2@mt.net

Project Status

Submitted
This project is **"Submitted"**. This means that it needs to be signed by the club leadership. Notifications emails have been sent to these parties with instructions on how to digitally sign this project. Once all the signatures are collected, the status of the project will be automatically changed to "Signed".

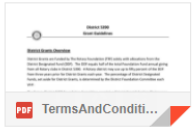
Project listed for the 2017-18 Rotary Year.

Proposed Financing

Existing Contributions Towards This Project	Date	Cash	DDF	Total
Townsend (5390)	26-Jun-17	$1,000	$1,000	$2,000
Townsend (5390)	19-Jul-17	$1,692	-$1,692	
Total		$2,692	$1,000	$3,692

DDF contributions in grey are pending approval of the corresponding district committee.

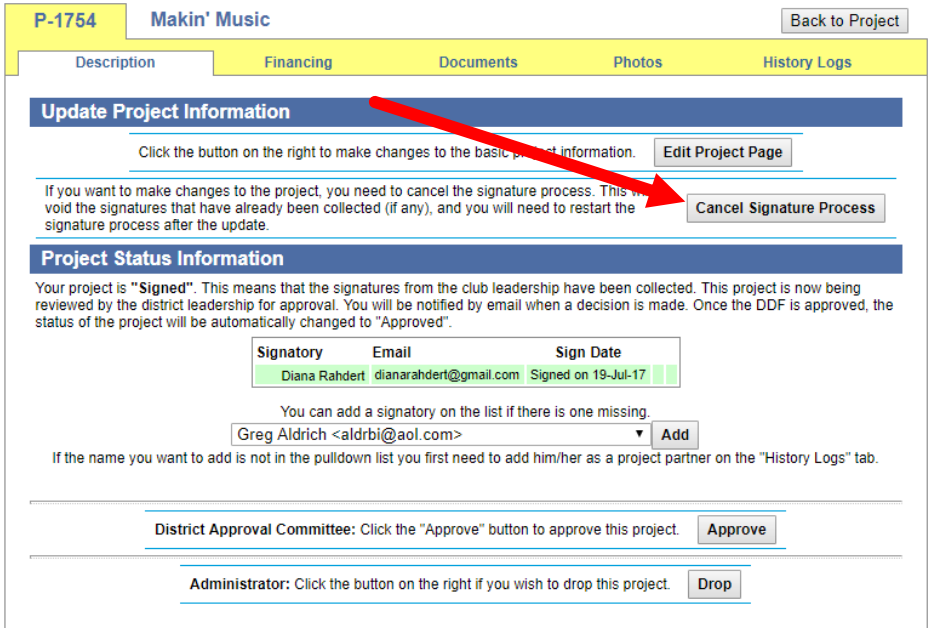
2 Attachments



SIGNING THE GRANT APPLICATION

Signature process

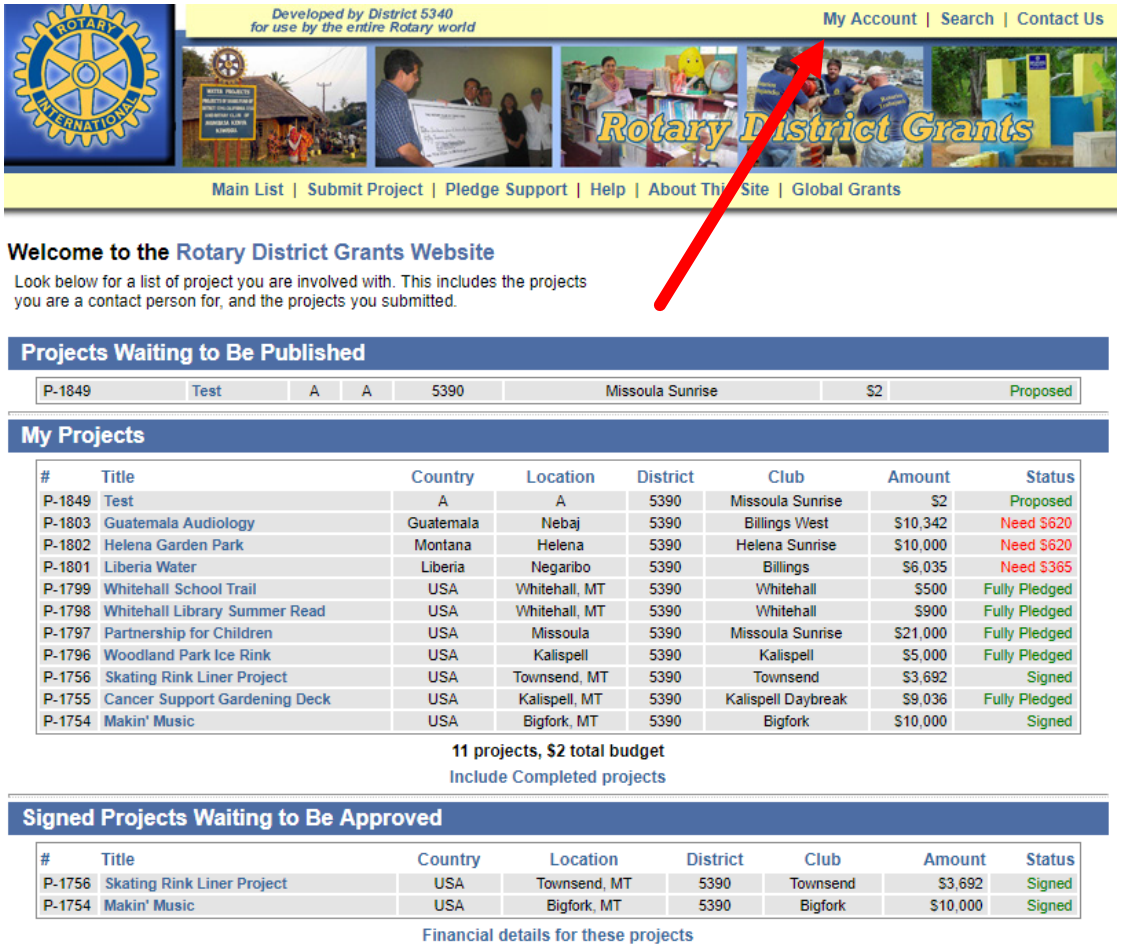
- Signature process may be cancelled and reinitiated as needed. One example is if upon review by Grant Selection Committee additional information is requested.



NAVIGATING THE PROCESS

Review process

- When you log in you can use 'My Account' to access all of the projects you are involved with.
- Once you log into the website on a device, it remembers your logon.



STATUS KEY

- Proposed – not listed on website, needs to be approved by Administrator
- Looking for Funding – only listed when full funding has not been identified
- Fully Pledged – fully funded
- Submitted – submitted for Signatures
- Signed – after all requested Signatures have been received
- Approved – authorized by Grant Selection Committee
- Paid – District Treasurer checks a box after check has been mailed
- Reported – all documentation uploaded and online Final Report 'Signed' indicating that it is ready for final Audit review
- Completed – Audit Committee checks a box indicating reporting has been accepted

TROUBLESHOOTING

Read the following Sections for help

- FAQs, Quick tips, Application Process
- Password reset
- Email management
- Project status
- Uploading documents

DISTRICT GRANT WEBSITE PRESENTATION

Please start early!!

- Committee will be able to assist in answering questions, but not at the last minute
- Review Quicktips found on website (click "Help" then "Quicktips")
- Committee will offer web conferencing to go over this process in Oct/Nov
- Use old Grant Application form to gather information prior to starting a project on the website
- Review Grant website for ideas and project contacts
- Copy of this presentation will be posted on District website
- Emails about next Grant online Training sessions will be sent to Club Presidents, PEs, and Foundation Chairs listed on District website with an email address
- Email Project Updates will only be sent to those listed in project
- Start thinking of your projects now

DISTRICT GRANT WEBSITE PRESENTATION

Thank you!

Questions?

Rotary