

DISTRICT 5390

DISTRICT GRANT OVERVIEW



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



DG Visit Protocol



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

DISTRICT RESOURCES

DISTRICT GRANT INFORMATION

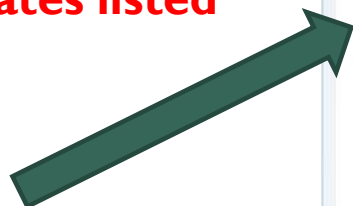
People of Action Templates

District Leaders Contact Information

DISTRICT GRANTS WEBSITE

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

- **Critical Dates listed**



Welcome

Subpages

[GRANT QUALIFICATION Website](#)

[MatchingGrants.org](#)

>>>>>>>>

[2019 Assembly Training Materials](#)

[District Grant Guidelines](#)

[District Grant Qualification 2019](#)

[Training Grant Timeline](#)

[Grant Application Overview 2019](#)

[Matching Grants Website Tutorial 2019](#)

[The Rotary Foundation Giving](#)

[Global Grants](#)

[Grant Wrap-up](#)

Files

[Progress Report Form for All District Grants](#)

[Global Grant Proposal Form 2017 in writeable PDF](#)

DISTRICT GRANTS

The Grant Guidelines, Checklist and Grant Timeline, Grant MOU and FMP (updated October 2019) The MOU and FMP are also found on the Matching Grants Qualification website. These forms can be downloaded on your computer.

For further information on district grants, these are our key dates and contacts for the 2020-21 Rotary year:

DISTRICT GRANT CRITICAL DATES:

Aug 1 - Nov 30 - Have 2 club members attend District Grant Training

January 31 - Clubs must be Qualified to receive any District or Global grant funds.

March 31 - District Grant Applications are due and must be in a "Signed" status.

July 31 - District Grant Award Applicants last day to upload "Proof of Club matching Funds"

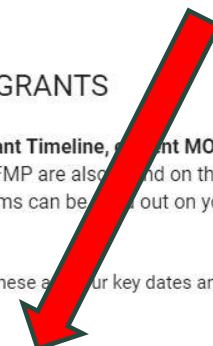
December 1 and June 1 - Progress Reports due on those Grant Award Projects not yet completed.

FINAL REPORTS DUE within 30 days of Grant Award Project Completion.

KEY CONTACTS:

Sue Carstens, **District Foundation Chair**, Rotary Club of Whitefish, 406-270-2760 CarstensSue@gmail.com

Stewardship: Jason Cronk, Rotary Club of Kalispell Daybreak, 406-261-8125, jcronk@iilcorp.org



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](#)

NET CONTROLLER: Sue Carstens, **District Foundation Chair**, Rotary Club of Whitefish, 406-276-2760 CarstensSue@gmail.com

Stewardship: Jason Cronk, Rotary Club of Kalispell Daybreak, 406-276-2760 jcronk@iilcorp.org

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

Grant Selection: Sue Carstens, Rotary Club of Whitefish, 406-276-2760 CarstensSue@gmail.com

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

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

If you use the **Rotary District 5390 Foundation** to deposit money for 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/alterd for more complicated expenses or with more funding partners

Mid-Town Rotary Club • Sunshine Park Improvement Project

EXPENSES

	To Be Paid:		(Non-Cash)
	<u>From Grant Funds</u>	<u>From Club Funds</u>	<u>In-Kind</u>
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?



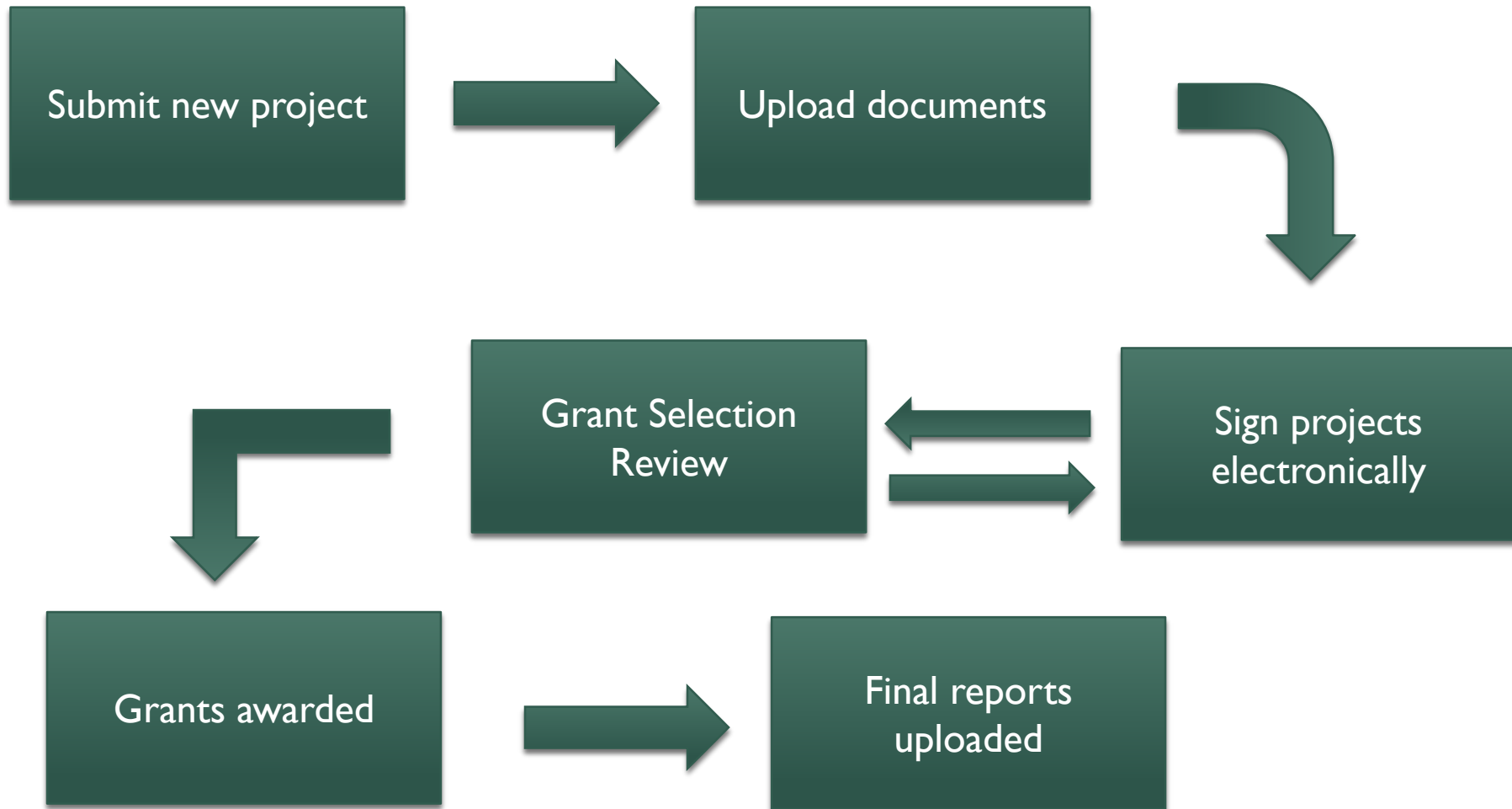


GRANT APPLICATION PROCESS

DISTRICT 5390



STEPS TO APPLYING FOR DDR



SUBMITTING A NEW PROJECT

MatchingGrants.org

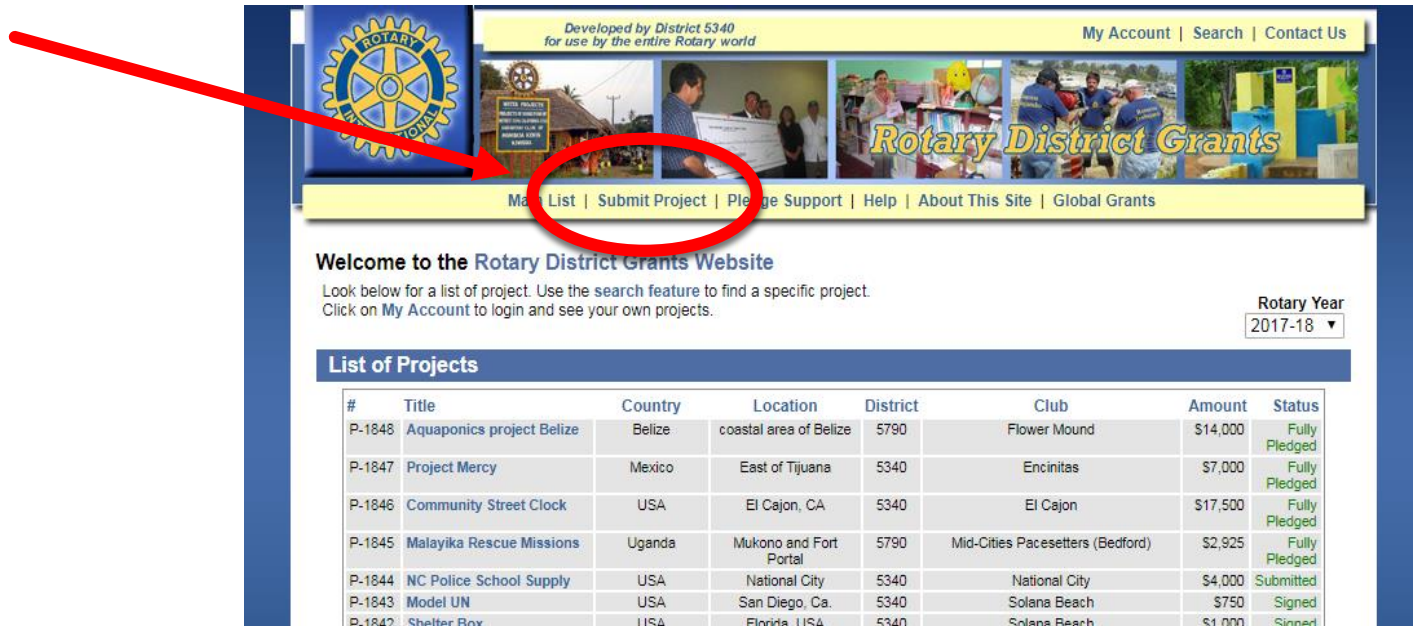
- From homepage
 - Select (click) on District Grants



SUBMITTING A NEW PROJECT

District Grants Website

- Select (click) submit project



The screenshot shows the Rotary District Grants Website. A red arrow points to the 'Submit Project' link in the navigation bar. The website header includes the Rotary logo, a banner with project photos, and links for 'My Account', 'Search', and 'Contact Us'. Below the banner is a navigation bar with links: 'Main List', 'Submit Project', 'Pledge Support', 'Help', 'About This Site', and 'Global Grants'. The main content area has a welcome message and a 'List of Projects' table. The 'Rotary Year' is set to 2017-18.

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for use by the entire Rotary world

My Account | Search | Contact Us

Rotary District Grants

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

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.

Rotary Year
2017-18 ▼

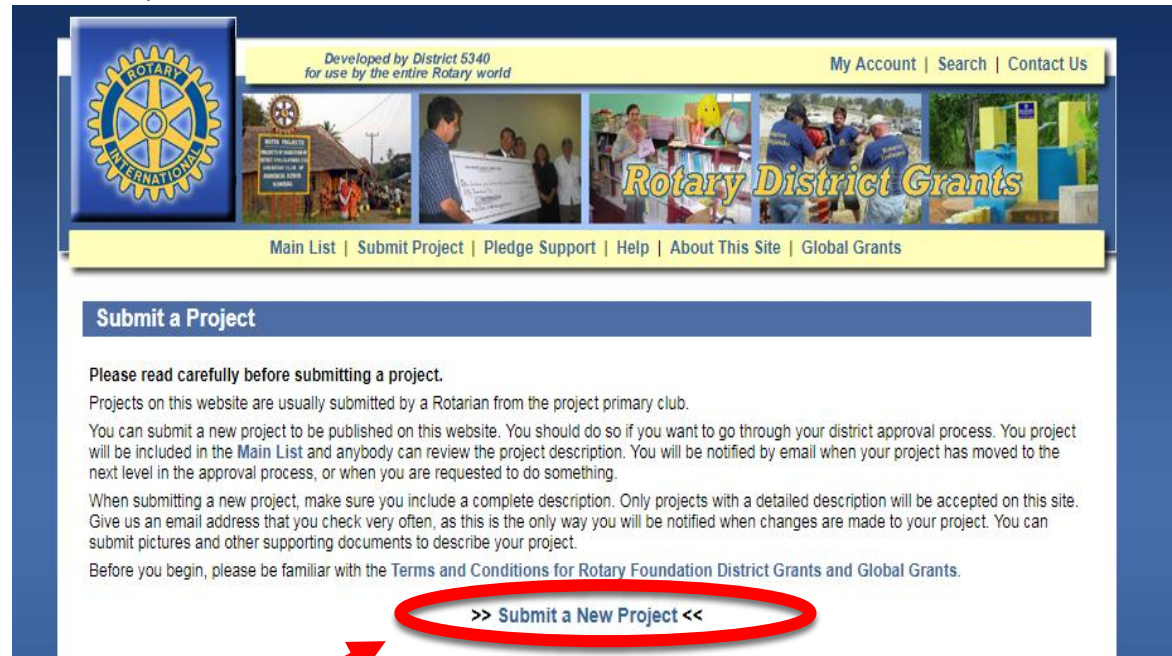
List of Projects

#	Title	Country	Location	District	Club	Amount	Status
P-1848	Aquaponics project Belize	Belize	coastal area of Belize	5790	Flower Mound	\$14,000	Fully Pledged
P-1847	Project Mercy	Mexico	East of Tijuana	5340	Encinitas	\$7,000	Fully Pledged
P-1846	Community Street Clock	USA	El Cajon, CA	5340	El Cajon	\$17,500	Fully Pledged
P-1845	Malayika Rescue Missions	Uganda	Mukono and Fort Portal	5790	Mid-Cities Pacesetters (Bedford)	\$2,925	Fully Pledged
P-1844	NC Police School Supply	USA	National City	5340	National City	\$4,000	Submitted
P-1843	Model UN	USA	San Diego, Ca.	5340	Solana Beach	\$750	Signed
P-1842	Shelter Box	USA	Florida, USA	5340	Solana Beach	\$1,000	Signed

SUBMITTING A NEW PROJECT

Disclaimer

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



The screenshot shows the Rotary District Grants website interface. At the top, there is a blue header with the Rotary International logo on the left and navigation links on the right: "My Account | Search | Contact Us". Below the header is a yellow banner with the text "Developed by District 5340 for use by the entire Rotary world" and a row of five small images showing various community projects. Below the banner is a yellow navigation bar with links: "Main List | Submit Project | Pledge Support | Help | About This Site | Global Grants". The main content area has a blue header with the text "Submit a Project". Below this, there is a paragraph of text explaining the submission process, followed by a red circle highlighting the link ">> Submit a New Project <<". A red arrow points from the bottom of the slide towards this link.

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My Account | Search | Contact Us

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

Submit a Project

Please read carefully before submitting a project.

Projects on this website are usually submitted by a Rotarian from the project primary club.

You can submit a new project to be published on this website. You should do so if you want to go through your district approval process. Your project will be included in the [Main List](#) and anybody can review the project description. You will be notified by email when your project has moved to the next level in the approval process, or when you are requested to do something.

When submitting a new project, make sure you include a complete description. Only projects with a detailed description will be accepted on this site. Give us an email address that you check very often, as this is the only way you will be notified when changes are made to your project. You can submit pictures and other supporting documents to describe your project.

Before you begin, please be familiar with the [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#).

[>> 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)

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My Account | Search | Contact Us

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

Cancel Reset Save

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

Country Rotary Year **2019-20** ▼ Location

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

<input type="checkbox"/> Peace and conflict prevention/resolution	<input type="checkbox"/> Disease prevention and treatment
<input type="checkbox"/> Water and sanitation	<input type="checkbox"/> Maternal and child health
<input type="checkbox"/> Basic education and literacy	<input type="checkbox"/> Economic and community development

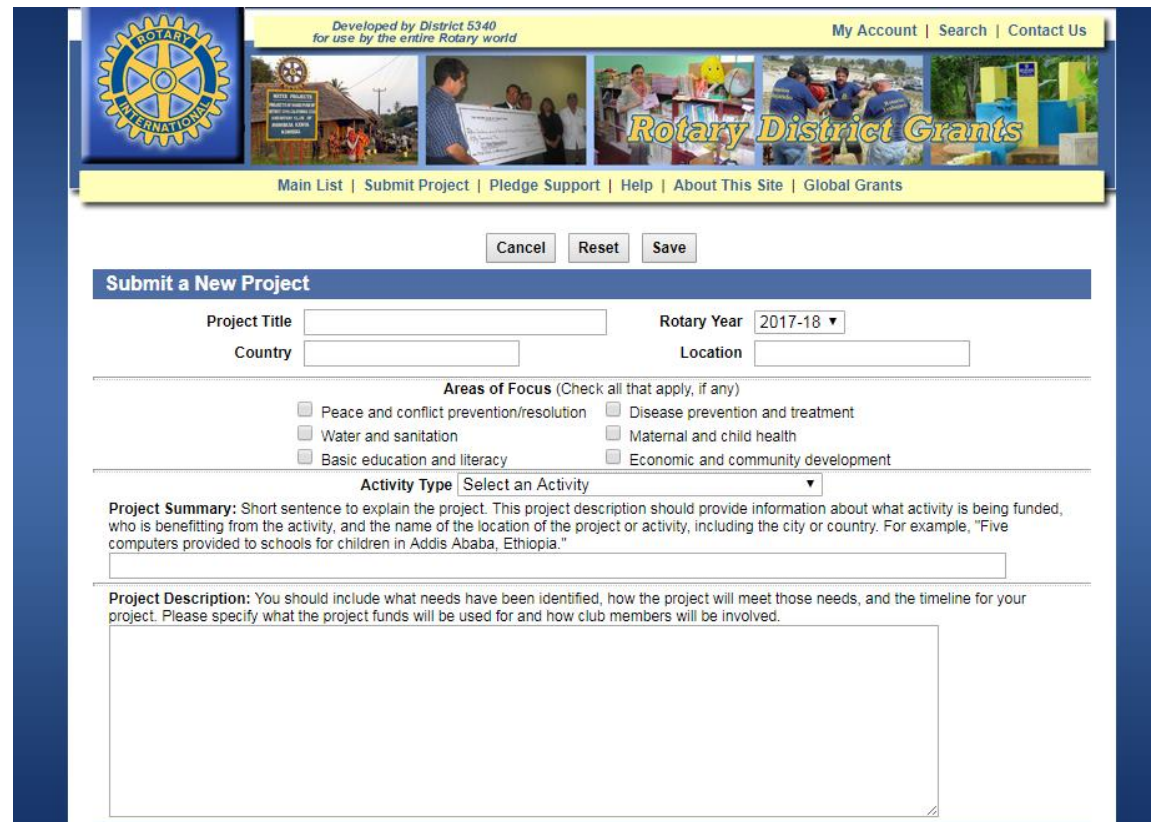
Activity Type

Project Summary: Short sentence to explain the project. This project description should provide information about what activity is being funded, who is benefiting from the activity, and the name of the location of the project or activity, including the city or country. For example: "Five

SUBMITTING A NEW PROJECT

Project form

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



The screenshot shows the 'Submit a New Project' form on the Rotary District Grants website. The header includes the Rotary International logo, a banner with the text 'Developed by District 5340 for use by the entire Rotary world', and navigation links: 'My Account | Search | Contact Us'. Below the banner is a secondary navigation bar with links: 'Main List | Submit Project | Pledge Support | Help | About This Site | Global Grants'. The form itself has a blue header bar with the title 'Submit a New Project' and three buttons: 'Cancel', 'Reset', and 'Save'. The form fields include: 'Project Title' (text input), 'Country' (text input), 'Rotary Year' (dropdown menu showing '2017-18'), and 'Location' (text input). Below these is the 'Areas of Focus' section with the instruction '(Check all that apply, if any)' and six checkboxes: 'Peace and conflict prevention/resolution', 'Water and sanitation', 'Basic education and literacy', 'Disease prevention and treatment', 'Maternal and child health', and 'Economic and community development'. The 'Activity Type' section has a dropdown menu labeled 'Select an Activity'. The 'Project Summary' section contains a text area with a placeholder text: '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."' and a small text input field. The 'Project Description' section contains a larger text area with a placeholder text: '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.'

SUBMITTING A NEW PROJECT

Project form

- Fill in project information
 - Activity type

The screenshot displays a web form for submitting a new project. At the top, there are two radio buttons: 'Basic education and literacy' (selected) and 'Economic and community development'. Below these is the 'Activity Type' dropdown menu, which is open, showing a list of options. The options are: 'Select an Activity' (highlighted), 'Administration (Max 3%)', 'Contingency (Max 20%)', 'Group Exchange', 'Community Development: General', 'Community Development: Renovation', 'Community Development: Disaster Recovery', 'Community Development: Volunteer Services', 'Education: General', 'Education: Literacy', 'Education: Scholarships', 'Education: Volunteer Services', 'Food/Agriculture: General', 'Food/Agriculture: Volunteer Services', 'Health: General', 'Health: Disease', 'Health: Volunteer Services', 'Water: Sanitation', 'Water: Supply/Access', and 'Water: Volunteer Services'. The form also includes fields for 'Name' (Sue Carstens), 'Club', 'Contact Phone Number', and 'Zip'. At the bottom, there is a footer with links: 'Main List', 'Submit Project', 'Pledge Support', 'FAQs', 'About This Site', and 'Global Grants'.

Basic education and literacy ☒ Economic and community development

Activity Type Select an Activity

Select an Activity

Administration (Max 3%)

Contingency (Max 20%)

Group Exchange

Community Development: General

Community Development: Renovation

Community Development: Disaster Recovery

Community Development: Volunteer Services

Education: General

Education: Literacy

Education: Scholarships

Education: Volunteer Services

Food/Agriculture: General

Food/Agriculture: Volunteer Services

Health: General

Health: Disease

Health: Volunteer Services

Water: Sanitation

Water: Supply/Access

Water: Volunteer Services

on

Number 5390

Name Sue Carstens

Club

on (DDF)

the project is approved.

Zip

on Mission Statement
and peace through the imp

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

SUBMITTING A NEW PROJECT

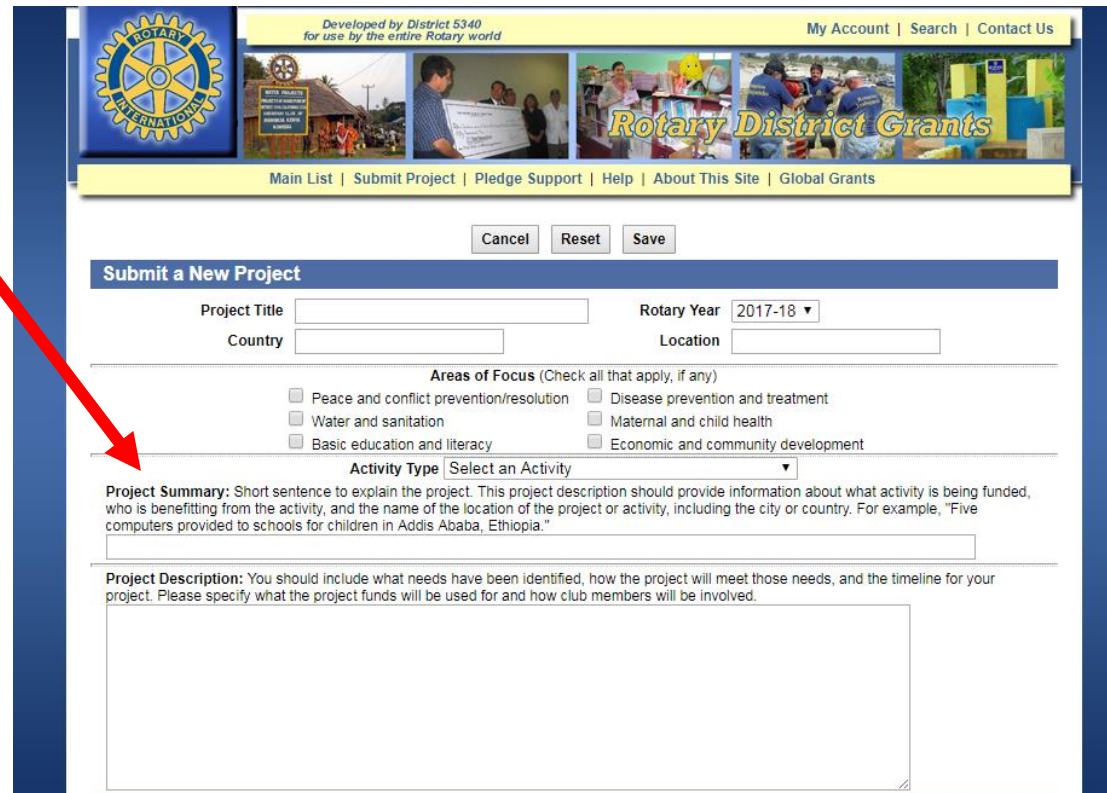
Project form

■ 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.



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My Account | Search | Contact Us

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

Cancel Reset Save

Submit a New Project

Project Title Rotary Year

Country Location

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

<input type="checkbox"/> Peace and conflict prevention/resolution	<input type="checkbox"/> Disease prevention and treatment
<input type="checkbox"/> Water and sanitation	<input type="checkbox"/> Maternal and child health
<input type="checkbox"/> Basic education and literacy	<input type="checkbox"/> Economic and community development

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.

SUBMITTING A NEW PROJECT

Project form

- Fill in project description

The screenshot shows the 'Submit a New Project' form on the Rotary District Grants website. The form includes fields for Project Title, Country, Rotary Year (2017-18), and Location. It also has checkboxes for Areas of Focus: Peace and conflict prevention/resolution, Disease prevention and treatment, Water and sanitation, Maternal and child health, Basic education and literacy, and Economic and community development. Below these is a dropdown for Activity Type. The Project Summary field is pre-filled with an example: '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."' The Project Description field is a large text area, and a red arrow points to it from the left. The form also includes 'Cancel', 'Reset', and 'Save' buttons at the top right.

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My Account | Search | Contact Us

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

Cancel Reset Save

Submit a New Project

Project Title Rotary Year 2017-18 ▼

Country Location

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

☐ Peace and conflict prevention/resolution ☐ Disease prevention and treatment

☐ Water and sanitation ☐ Maternal and child health

☐ Basic education and literacy ☐ Economic and community development

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.

SUBMITTING A NEW PROJECT

Project form

■ Fill in project information

- Project contact info
- Budget (simple)
- Payment info

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.

Cancel

Reset

Save

SUBMITTING A NEW PROJECT

Project form

■ Fill in project information

- Project contact info
- Budget (simple)
- Payment info

■ Check box certifying project fits grant guidelines

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.

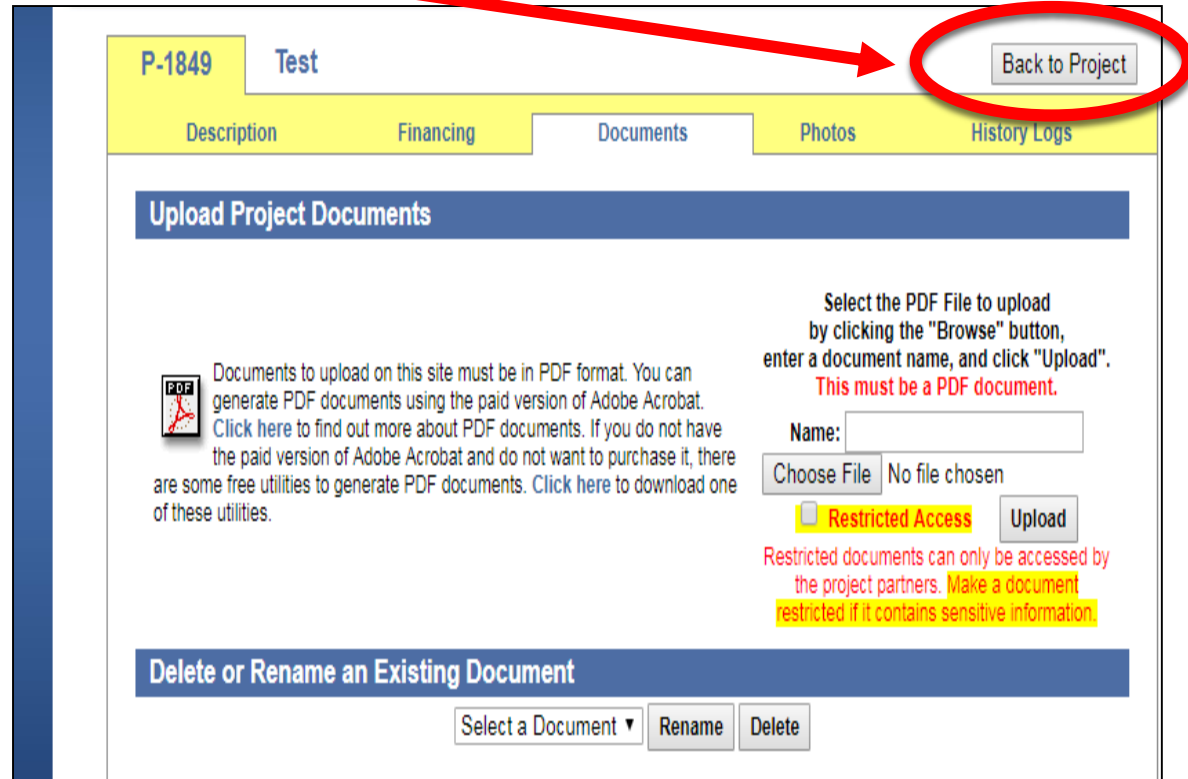
Cancel

Reset

Save

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



The screenshot displays a web interface for project management. At the top, there are tabs for 'P-1849' and 'Test'. Below these are navigation tabs: 'Description', 'Financing', 'Documents' (which is the active tab), 'Photos', and 'History Logs'. A red arrow points from the 'Back to Project' button, which is circled in red, to the 'Documents' tab. The main content area is titled 'Upload Project Documents'. It includes a PDF icon and text stating that documents must be in PDF format. There are links to find out more about PDF documents and to download utilities. A form for uploading a document is shown, with fields for 'Name', 'Choose File' (which shows 'No file chosen'), and an 'Upload' button. Below the form, there is a section for 'Delete or Rename an Existing Document' with a 'Select a Document' dropdown and 'Rename' and 'Delete' buttons. A red circle highlights the 'Back to Project' button in the top right corner.

P-1849 Test

Description Financing Documents Photos History Logs

Upload Project Documents

Documents to upload on this site must be in PDF format. You can generate PDF documents using the paid version of Adobe Acrobat. [Click here](#) to find out more about PDF documents. If you do not have the paid version of Adobe Acrobat and do not want to purchase it, there are some free utilities to generate PDF documents. [Click here](#) to download one of these utilities.

Select the PDF File to upload by clicking the "Browse" button, enter a document name, and click "Upload". **This must be a PDF document.**

Name:

No file chosen

☐ **Restricted Access**

Restricted documents can only be accessed by the project partners. [Make a document restricted](#) if it contains sensitive information.

Delete or Rename an Existing Document

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!!

P-1849 Test [Back to Project](#)

Description Financing **Documents** Photos History Logs

Upload Project Documents

Select the PDF File to upload by clicking the "Choose File" button, enter a document name, and click "Upload". This must be a PDF document.

Documents to upload on this site must be in PDF format. You can generate PDF documents using the paid version of Adobe Acrobat. [Click here](#) to find out more about PDF documents. If you do not have the paid version of Adobe Acrobat and do not want to purchase it, there are some free utilities to generate PDF documents. [Click here](#) to download one of these utilities.

Name:

Restricted documents can only be accessed by the project partners. [Make a document restricted](#) if it contains sensitive information.

Delete or Rename an Existing Document

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

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

P-1849 Test Back to Project

Description Financing Documents Photos History Logs

The uploaded photo must be a JPG photo.
Photo not uploaded.

Upload Project Photos

Select the Picture to upload and click "Upload".

Choose File No file chosen Upload

Caption:

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/alterd for more complicated expenses or with more funding partners

Mid-Town Rotary Club • Sunshine Park Improvement Project

EXPENSES	To Be Paid:		(Non-Cash)	
	From Grant Funds	From Club Funds	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.

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

P-1754 Makin' Music [Back to Project](#)

Description Financing Documents Photos History Logs

History Log / Email Communication

History log entries are added in the "History Logs" tab of the project page. They cannot be changed after submission. A notification email is sent to all parties to notify them of the new entry.

Date: 31 Jul 2017

Text of the history log entry to add on the web page:
Please, only submit history log entries for significant information about the project status, this is not a field for comments. (800 characters left)

To: dianarahdert@gmail.com, carstenssue@gmail.com
Cc: frank.ashleyll@gmail.com

Text to add to the notification email (will not be added to the web page):

[Save History Log/Send Email](#)

Add People to the Distribution List / Give Administrative Access

All notification email for History Log entries and Email Communications are sent to the **distribution list in green above**. If you wish to add a new contact person for this project please enter the name and email address below and click on "Add". This new contact person will have full access to this project administration pages unless you uncheck the box below.

Name: Email: [Add](#)

☒ Administrative Access ☒ Email Distribution List

Administrative Access allows the user to make changes to the project, upload documents and photos, and enter history log entries. Email Distribution List allows the user to view restricted documents, and to receive the notification emails for the project.

Remove from the Distribution List / Revoke Administrative Access

If somebody withdrew from the project and no longer wish to receive the notification emails, please select the email address below and click on "Remove". This address will be removed from the distribution lists for all future notification emails. If you are included in the **list in green above** and cannot select your address below to be removed, it means you are the project contact and your email address needs to be removed from there, by editing the project page.

Greg Aldrich <aldrbi@aol.com> (Admin) [Remove](#)

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”

P-1798 **Whitehall Library Summer Read** [Administration](#)

[Description](#) [Financing](#) [Documents](#) [Photos](#) [History Logs](#)

Project Description

Country: USA Location: Whitehall, MT Total Budget: \$900
Area of Focus: Basic education and literacy
Activity Type: Education: Literacy
Summary: Whitehall Library summer reading program

Funds for the project will be used to purchase reading awards and help offset the cost of a puppet show from Colorado. Rotarians will be helping in the weekly programs and volunteering hours to help put away books and clean the library.

Project Contact Person

District: 5390 Rotary Club of: Whitehall
Primary Contact: Dustin Lewis Email: dlewis55@gmail.com

Project Status

Fully Pledged
This project is "Fully Pledged". This means the amount of the pledges is equal to the total budget of the project. Now the project needs to be finalized and go through the club signature process. This process gets started on the [administration page](#).
Project listed for the 2017-18 Rotary Year.

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.

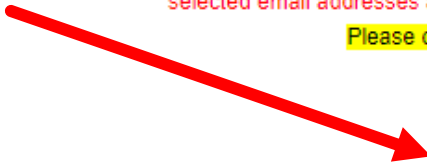
Supporting Documents

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 people 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
<input checked="" type="checkbox"/>	Dustin Lewis	dlewis55@gmail.com	Primary Contact
<input type="checkbox"/>	Andy Turner	anjturner@gmail.com	Project Creator
<input type="checkbox"/>	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".

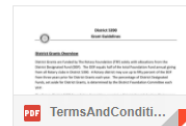
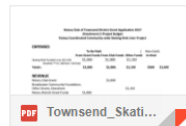
Project listed for the 2017-18 Rotary Year.

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.

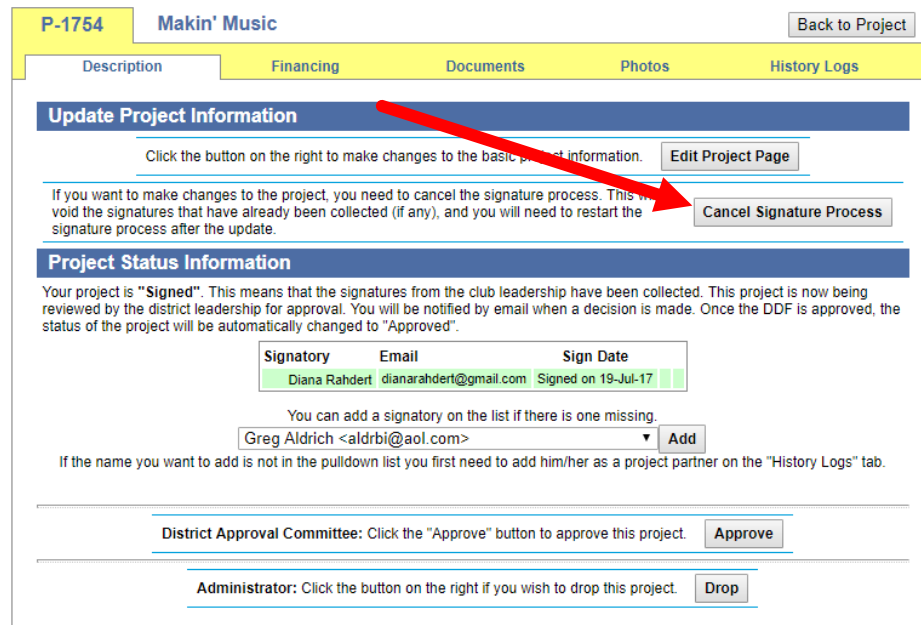
2 Attachments



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.



P-1754 Makin' Music [Back to Project](#)

Description **Financing** Documents Photos History Logs

Update Project Information

Click the button on the right to make changes to the basic project information. [Edit Project Page](#)

If you want to make changes to the project, you need to cancel the signature process. This will void the signatures that have already been collected (if any), and you will need to restart the signature process after the update. [Cancel Signature Process](#)

Project Status Information

Your project is **"Signed"**. This means that the signatures from the club leadership have been collected. This project is now being reviewed by the district leadership for approval. You will be notified by email when a decision is made. Once the DDF is approved, the status of the project will be automatically changed to "Approved".

Signatory	Email	Sign Date
Diana Rahdert	dianarahdert@gmail.com	Signed on 19-Jul-17

You can add a signatory on the list if there is one missing.

Greg Aldrich <aldrbi@aol.com> [Add](#)

If the name you want to add is not in the pulldown list you first need to add him/her as a project partner on the "History Logs" tab.

District Approval Committee: Click the "Approve" button to approve this project. [Approve](#)

Administrator: Click the button on the right if you wish to drop this project. [Drop](#)

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.

Welcome to the Rotary District Grants Website

Look below for a list of project you are involved with. This includes the projects you are a contact person for, and the projects you submitted.

Projects Waiting to Be Published

P-1849	Test	A	A	5390	Missoula Sunrise	\$2	Proposed
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My Projects

#	Title	Country	Location	District	Club	Amount	Status
P-1849	Test	A	A	5390	Missoula Sunrise	\$2	Proposed
P-1803	Guatemala Audiology	Guatemala	Nebaj	5390	Billings West	\$10,342	Need \$620
P-1802	Helena Garden Park	Montana	Helena	5390	Helena Sunrise	\$10,000	Need \$620
P-1801	Liberia Water	Liberia	Negaribo	5390	Billings	\$6,035	Need \$365
P-1799	Whitehall School Trail	USA	Whitehall, MT	5390	Whitehall	\$500	Fully Pledged
P-1798	Whitehall Library Summer Read	USA	Whitehall, MT	5390	Whitehall	\$900	Fully Pledged
P-1797	Partnership for Children	USA	Missoula	5390	Missoula Sunrise	\$21,000	Fully Pledged
P-1796	Woodland Park Ice Rink	USA	Kalispell	5390	Kalispell	\$5,000	Fully Pledged
P-1756	Skating Rink Liner Project	USA	Townsend, MT	5390	Townsend	\$3,692	Signed
P-1755	Cancer Support Gardening Deck	USA	Kalispell, MT	5390	Kalispell Daybreak	\$9,036	Fully Pledged
P-1754	Makin' Music	USA	Bigfork, MT	5390	Bigfork	\$10,000	Signed

11 projects, \$2 total budget

Include Completed projects

Signed Projects Waiting to Be Approved

#	Title	Country	Location	District	Club	Amount	Status
P-1756	Skating Rink Liner Project	USA	Townsend, MT	5390	Townsend	\$3,692	Signed
P-1754	Makin' Music	USA	Bigfork, MT	5390	Bigfork	\$10,000	Signed

Financial details for these projects

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?

