



District 5390 District Grant Time Line & Checklist

District Grant Yearly Dates

The Rotary Year: July 1 – June 30

The Grant Cycle: August 1 – May 31

Please note these two timelines overlap, but the grant cycle's timeline reflects the upcoming Rotary year, not current Rotary year – The beginning of the Grant Cycle's timeline is preparing for the Rotary year which is 11 months away.

Additionally, qualification items and applications are due *prior* to the Rotary Year starting, and applications are approved a few months prior to the Rotary Year starting. The District Grant Website is www.MatchingGrants.org.

Time Line for Grant Qualification for the *Upcoming* Rotary Year:

August 31: All grant related documentation shall be updated and made available on the montanarotary.org website, under the link 'District Grant Information', for the upcoming Rotary year – 1 year away.

August 1- November 15: Grant Training sessions will be held and all clubs shall have two (2) members from their club attend. One (1) must be in person at District Assembly, the other may be at District Assembly or attend one of the two (2) scheduled online events. This needs to be done each and every year in order to satisfy the 'grant training' qualification requirement, as listed on the Memorandum of Understanding (MOU).

January 31: Clubs submit their completed MOU, FMP and proof of Income Tax filing, along with all necessary qualification requirements listed under the MOU to the District Grant Website. MOU & FMP may be signed in person or electronically using the website signature option.

February 1-28: The District Stewardship Committee reviews all necessary documentation and determines the qualification status of each club. Clubs are given District Grant Application submission approval or disapproval.

March 1: Clubs must be qualified on District Grant Website in order to apply for any matching DDF.

Time Line for Grant Submission for the *Upcoming* Rotary Year Starting July 1st:

Feb 1 – March 31: Approved and qualified clubs can submit their grant application(s) to the Grant Selection Committee. Grant applications submitted by non-qualified clubs will not be accepted.

March 31: District Grant application deadline for the grant cycle reflected in the upcoming Rotary year, beginning on July 1. Grant applications must be electronically "Signed" to be considered for a Grant Award and will not be reviewed if submitted after March 31st.

April 1-May 15: The District Grant Selection Committee reviews and approves or denies all submitted applications.

May 15-31: The District Grant Selection Committee notifies all clubs of grant approval or denial through District Grant Website.

June: The DGE and DRFC submit approved District 5390 District Grant applications to TRF for TRF assessment and approval.

July: TRF approves District 5390 grant applications and disburses total grant award monies to District 5390.

July 1: Rotary Year starts!

July 31: Deadline for proof of matching funds submission as uploaded document to District Grant Website. All approved grants need to submit proof of matching club funds in the form of a club account statement.

August: Grant funds will be disbursed to individual clubs as soon as monies are made available by TRF, and following the submission of proof of matching funds.

Starting in June: Clubs carry out their projects throughout the *current* Rotary year. Clubs can start to spend funds after receiving 'Approved' status.

Within 30 Days Following the Completion of Your Club's Project: Submit a Final Report along with all supporting documentation to the District Grant Website. This will be reviewed by the Audit Committee, and if acceptable, the project status will be set to 'Complete.'

BEFORE December 1: A Progress Report is due if your club's project has not started or is not yet finished. Progress reports are uploaded to the 'Document' section of your club project on the District Grant Website. Please make a log entry to let the District know a Progress Report has been updated.

BEFORE May 31: If projects have not been or will not be completed by May, another Progress Report must be submitted no later than May 31st. Progress reports are uploaded to the 'Document' section of your club project on the District Grant Website. Please make a log entry to let the District know a Progress Report has been uploaded.

District Stewardship Committee:

Robbie Mathiason - Chair
Phone: 406-261-0047
robbiem@ctagroup.com

District Grant Selection Committee:

Brian Furey– Chair
Phone: 406-546-6028
Btf40782@gmail.com

District Auditing Committee:

Duane Johnson – Chair
406-261-5911
newcropper@outlook.com

Grant Qualification Checklist

1. Club in good standing with District 5390 and RI
2. Be current on all grant reports
3. Complete MOU and FMP
4. Submit 990 proof of Filing by January 31
5. Submit FMP by January 31
6. Submit MOU and Addendum by January 31
7. Have two people attend grants training
 - a. At least 1 in person at District Assembly
 - b. Second at District Assembly or option to attend online training
8. Have at least one person serving on a District Committee
 - a. Grant Selection
 - b. Stewardship
 - c. Audit
 - d. Polio
 - e. Scholarship
 - f. Peace and Conflict Resolution
 - g. International Service / Global Grants
 - h. Membership
 - i. Public Relations / Image
 - j. Vocational Services
9. Goals complete in Club Central
10. Have President Elect attend PETS
11. Provide bank statement of matching funds by 7/31