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# DISTRICT 5390

## District Grant Timeline

Grant Training Assembly



# DISTRICT GRANT TIMELINE

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Qualification to Projects Approved

**The Grant Cycle:**  
**July 1 – June 30**

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Prior to Year Projects get done

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When Approved Projects happen

**Project Rotary**  
**Year:**  
**July 1 – June 30**

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# TIMELINE FOR GRANT QUALIFICATION

- August – November
  - District Holds Grant Training Sessions
  - 2 Club Members Must Attend

“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.”

# ONLINE GRANT TRAINING SESSIONS

## Fall 2020 Session 1

- Via zoom meeting
- Pre-Register on District website

## Fall 2020 Session 2

- Via Zoom meeting
- Pre-Register on District website

# TIMELINE FOR GRANT QUALIFICATION

- **January 31, 2021**
  - Final date for all qualification requirements
  - Final date for MOU and FMP Submission
  - Final date for proof of tax filing
- **Feb 1<sup>st</sup> - 28<sup>th</sup>**
  - District Stewardship Committee reviews Club Qualifications
- **Feb 1<sup>st</sup> - Mar 1<sup>st</sup>**
  - Qualification Status posted on MatchingGrants.org
  - Clubs must be qualified to apply for all DDF (both District and Global)

# DISTRICT QUALIFICATION WEBSITE

[Edit](#)

40 clubs: 21 qualified, 19 non-qualified

◀ 2018-19 ▶

Club Name	President's Name	President's Email	PE's Name	PE's Email	GMS	MOU	TAX	FMP	CUR
Anaconda	Rick Powers	rmppaaa@cs.com	Diane Brunell	dbrunell@firstmontanabank.com	✓	✓	✓	✓	✓
Big Sandy					✗	✗	✗	✗	✗
Big Sky	Sam Lightbody	lightbody77@gmail.com	Laura Seyfang	lauraseyfang@sbcglobal.net	✓	✓	✓	✓	✓
Bigfork	Mary Byers	mcebyers@gmail.com	Monarae Tuhy	thunderglory@centurytel.net	✓	✓	✓	✓	✓
Billings	Lee Humphrey	lee.humphrey@edwardjones.com	Mike Mayott	billings999pe@gmail.com	✓	✓	✓	✓	✓
Billings West	Seth Wildung	s_wildung@hotmail.com	Gwenna Peters	av8her@gmail.com	✗	✗	✗	✗	✗
Bozeman	Chris G Budeski	chris@mad-eng.com	Cindy Sease	csease@dailychronicle.com	✓	✓	✓	✓	✓
Bozeman Sunrise	Sydney Rick	sydney@awefinancial.com	Jason Smith	jasonaldensmith@yahoo.com	✓	✓	✓	✓	✓
Butte	David Armstrong	darmstrongaz@hotmail.com	John Winston	jwinston@glacierbank.com	✓	✓	✓	✓	✓
Columbia Falls					✗	✗	✗	✗	✗
Deer Lodge					✗	✗	✗	✗	✗
Dillon	David Brastrup	dbrastrup@gmail.com	Martin Malesich	mrmalesich@bresnan.net	✓	✗	✗	✗	✗
Evergreen	Ross Holter	r.holter@flathead.coop	Malinda Shafman	dg5390.2016@gmail.com	✓	✓	✓	✓	✓
Glendive	Connie Hilger	hilger@midrivers.com	Jerry Jimison	jjimison@midrivers.com	✓	✗	✗	✗	✗
Great Falls	Todd Neighbor	todd.neighbor@usbank.com	Cari P Yturri	cyturri79@gmail.com	✓	✓	✓	✓	✓
Hamilton	Steve Kice	sjkice56@gmail.com	Carol Holman	carol.holman@stockmanbank.com	✓	✓	✓	✓	✓
Havre					✗	✗	✗	✗	✗
Helena	Rex Walsh	rwalsh@stockmanbank.com	Brett Clark	bpclark.esq@gmail.com	✓	✓	✓	✓	✓
Helena Sunrise	Michelle Vanisko	mvanisko@gmail.com	Murray Strong	murstrong1958@gmail.com	✓	✓	✓	✓	✓
Kalispell	Janice Lake	jlake@equitymt.com	Joseph Carbonari	bluemoose@centurylink.net	✓	✓	✓	✓	✓
Kalispell Daybreak	Jason Cronk	jcronk@ilcorp.org	Jane Karas	jkaras@fvcc.edu	✓	✓	✓	✓	✓

# TIMELINE FOR GRANT SUBMISSION

- **Feb 1<sup>st</sup>- Mar 31<sup>st</sup>**
  - Qualified Clubs Submit Grant Applications
- **Mar 31<sup>st</sup>**
  - Grant Projects must be in “Signed” status on MatchingGrants.org
- **Apr 1<sup>st</sup> – May 15<sup>th</sup>**
  - Grant Selection Committee Reviews all Grant Requests
  - Approves Funds for projects up to first \$2,500 requested (unless additional Funds available)
- **May 15<sup>th</sup>-31<sup>st</sup>**
  - Grant Selection Committee notifies Clubs of “Approved” Funding Status
  - DGE, DRFC and DGSC submit approved Grant Applications to TRF

# TIMELINE FOR GRANT SUBMISSION

- **June**
  - DGE, DRFC and DGSC submit approved Grant Applications to TRF
- **July**
  - TRF Reviews Grant and distributes Funds to District 5390
- **Jul 1 – Rotary Year begins!**
- **Jul 31**
  - Deadline for submitting proof of club's matching funds
  - Funds will not be distributed to club until this proof has been uploaded to Documents tab
  - All Grant Reporting must be current
  - All Dues payments must be current

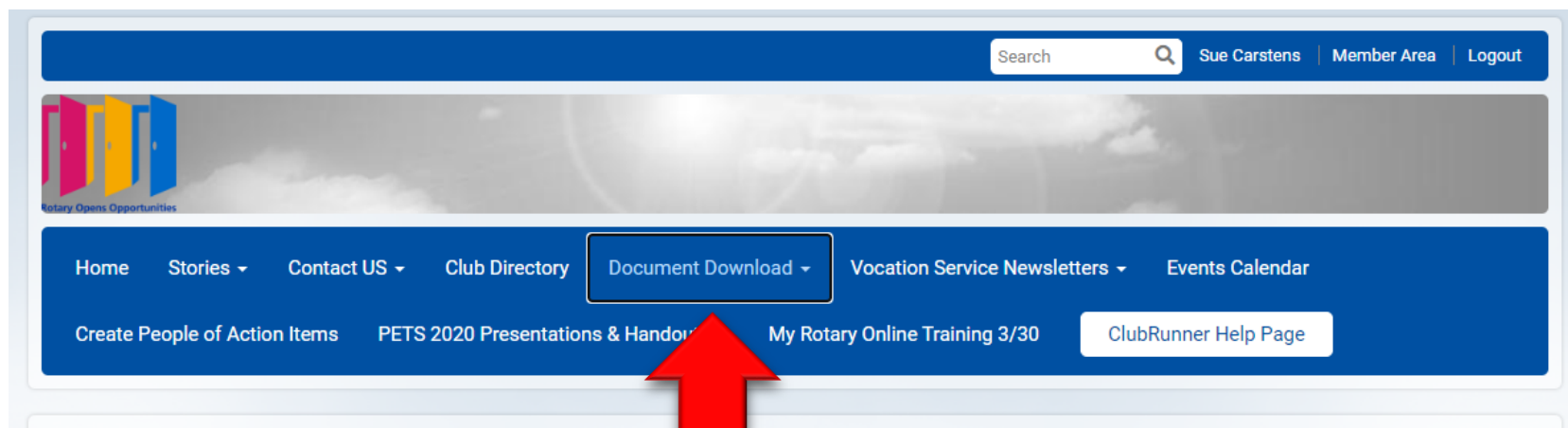


# TIMELINE FOR GRANT SUBMISSION

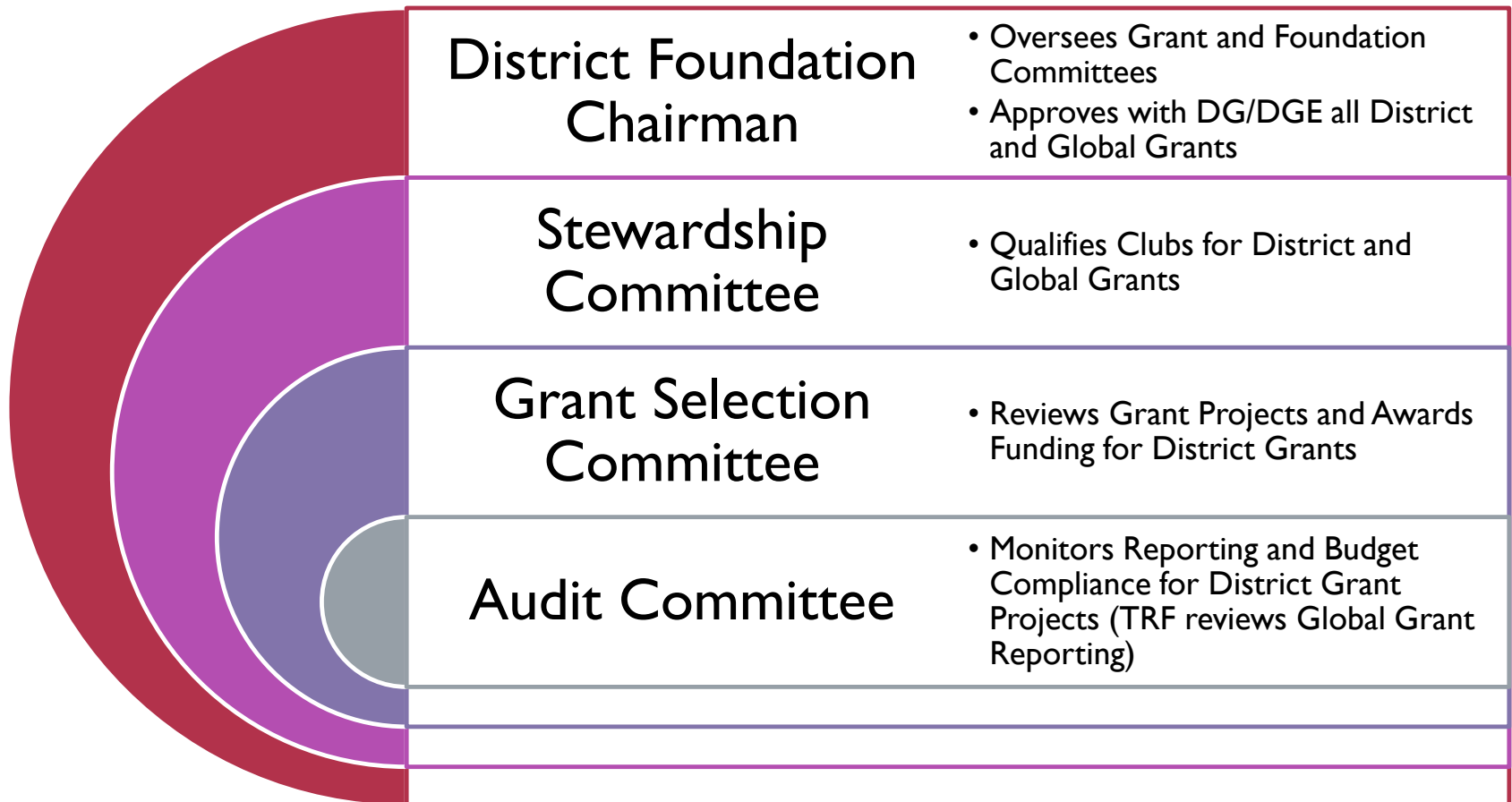
- **August**
  - District Grant Funds distributed
- **Dec 1**
  - Club projects not started or finished must submit a Progress Report to the document tab of project on MatchingGrants.org website
  - Progress Report form found on the District website ([www.montanarotary.org](http://www.montanarotary.org))
- **June 1**
  - All projects not completed must have another Progress Report submitted to the District Grant website

# DISTRICT WEBSITE

- Progress Report now found in “Document Download” on District Website



# DISTRICT GRANT COMMITTEES



# TIMELINE FOR GRANT SUBMISSION

## Tips and Notes

- Clubs must be Qualified to receive any District Grant Funds – both District and Global Grants
- All reporting must be submitted to [MatchingGrants.org](http://MatchingGrants.org) website
- Jan 31st is FINAL DAY to
- Submit MOU, FMP, and proof of tax filing
- Be current on grant reporting, have completed Grant Training, have dues current, attended PETS, etc.
- Progress Report – Suggest making a History Log entry to let Audit Committee know there is a report to review
- Grant Worksheet on District website is for use in gathering project information and should not be uploaded to club project
- Rotary Club must be lead on the project
- Club matching funds must be paid from a Club Financial Account
- **Start Early!**

# DISTRICT 5390

## District Grant Timeline

Thank you!

Questions?



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# DISTRICT 5390

## District Grant Qualification



Grant Training Assembly




# DISTRICT 5390 GRANT QUALIFICATION

- Grant qualification information is found on the District 5390 website [www.montanarotary.org](http://www.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 5390 GRANT QUALIFICATION

## 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](#)

## DISTRICT GRANTS

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

For further information on district grants, these are your 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.


- Club documents are uploaded and Club Qualification status is found on the MatchingGrants website
- To begin, click on the link for “GRANT QUALIFICATION”



# DISTRICT 5390 GRANT QUALIFICATION



Developed by District 5340  
for use by the entire Rotary world



**Grants Website Administration**

My Account | District Grants | My Account | Global Grants

## Club Qualification Summary for District 5390 in 2019-20

**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 near certain that the club is really qualified, even if the list is not fully updated.

Edit 39 clubs: 17 qualified, 22 non-qualified 2019-20

Club Name	President's Name	President's Email	PE's Name	PE's Email	GMS	MOU	TAX	FMP	CUR
Anaconda	Karla Dedman	karlamdedman@yahoo.com	Diane Brunell	dbrunell@firstmontanabank.com	✓	✗	✗	✗	✗
Big Sandy					✗	✗	✗	✗	✗
Big Sky	Laura Seyfang	lauraseyfang@sbcglobal.net	Blair Mohn	bbmgreen@mac.com	✓	✗	✗	✗	✗
Bigfork	MonaRae Tuhy	thunderglorymobile13@gmail.com	Tim Nolan	tnnnolan@gmail.com	✓	✓	✓	✓	✓
Billings	Mike Mayott	billings999pe@gmail.com	Tyler Bush	tylerb@mckinstry.com	✓	✓	✓	✓	✓
Billings West	Michael Magone	msmagone@yahoo.com	Pam Bailey	pjbailey@wtp.net	✓	✓	✓	✓	✓
Bozeman	Cindy Sease	csease@dailychronicle.com	John Patterson	jspatterson972@gmail.com	✓	✓	✓	✓	✓
Bozeman Sunrise	Jason Smith	jasonaldensmith@yahoo.com	Katie Madison		✓	✓	✓	✓	✓
Butte	John Winston	jwinston@glacierbank.com			✓	✗	✗	✗	✗
Columbia Falls					✗	✗	✗	✗	✗
Deer Lodge					✗	✗	✗	✗	✗
Dillon	Richard Achter	dachter@barretthospital.org	Mike Blando	mikeblando0717@gmail.com	✓	✗	✗	✗	✗
Evergreen	Malinda Shafman	dg5390.2016@gmail.com	Robbie Mathiason	robbiemathiason@cushingterrell.com	✓	✓	✓	✓	✓

- This opens the main District Qualification page
- To access your club qualification page, click on your club's name.

# DISTRICT 5390 GRANT QUALIFICATION

## Club Qualification Details

[Back to list of clubs](#)

### Anaconda Rotary Club, District 5390 in 2018-19

Requirements	Status	Comments
1. Have 2 club members attend the Grants Management Seminar.		No recorded attendance. Attendance is recorded by the District Qualification Administrator.
2. Have the 2018-19 and 2019-20 Club Presidents sign the Memorandum of Understanding (MOU).		No MOU on file. See instructions below to fix this.
3. The club needs to provide proof that taxes were filed.		See instructions below to upload the proof document.
4. Have the 2018-19 and 2019-20 Club Presidents sign the Financial Management Plan (FMP)		No FMP on file. See instructions below to fix this.
5. The club needs to be current in the payment of District and RI dues.		Requirement not recorded. This is recorded by the District Qualification Administrator.

## Sign the Memorandum Of Understanding (MOU)

### Upload Memorandum of Understanding

[Click here](#) to see a blank copy of the Memorandum of Understanding in PDF format.

Once you have filled the Memorandum of Understanding 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"**

☐ Check this box if the uploaded document contains signatures. If you do not have signatures in the document you will be asked to have the uploaded document signed electronically by the 2018-19 and 2019-20 Club Presidents.

No file chosen



## Proof of Tax Filing

### Upload Proof of Tax Filing

Once you have filled the Proof of Tax Filing you can click the

Each document has it's own section for uploading.

- Step 1: Choose file from your device
- Step 2: Once file name appears on the screen, click Upload.
- Step 3: Send the document for Signatures from Club President and PE

**NOTE: Before uploading, remember to check the box if the document is already signed.**

# DISTRICT 5390 GRANT QUALIFICATION

- The Memorandum of Understanding (MOU) and the Club Financial Management Plan (FMP) are the two forms needed for grant qualification. You will need to download and save both to your computer.
- Copies can be found on the District website or MatchingGrants website.
- **Change in the MOU from last year.** “Conflict of Interest” section is now two questions.
  - “Will your club declare any and all conflicts of Interest for the Stewardship Committee to review? Yes \_\_\_\_ No \_\_\_\_”
  - The name of the club member responsible for reviewing and reporting any and all Conflicts of Interest? \_\_\_\_\_

## District Website

### 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 5390 GRANT QUALIFICATION

- Complete both MOU and FMP forms.
- All blanks must be filled in and questions answered.
- The MOU requires initials in the box for each statement.
- After you complete entering all information, save the document to a computer.
- Upload each document in the correct section of the website.

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[FMP - Club Financial Management Plan Application](#)



# DISTRICT 5390 GRANT QUALIFICATION

In addition to the MOU and FMP, Proof of Tax filing must be uploaded.

- This can be either:
  - A copy of your club's IRS 990 confirmation
  - Confirmation in a letter from your accounting professional

PLEASE: Do NOT upload your club's full tax return!

# DISTRICT 5390 GRANT QUALIFICATION

## Example of online Tax confirmation from the IRS



### Confirmation

Your Form 990-N(e-Postcard) has been submitted to the IRS

- **Organization Name:** ROTARY INTERNATIONAL
- **EIN:** 260078525
- **Tax Year:** 2016
- **Tax Year Start Date:** 07-01-2016
- **Tax Year End Date:** 06-30-2017
- **Submission ID:** 10065520173171524498
- **Filing Status Date:** 11-13-2017
- **Filing Status:** Accepted

**MANAGE FORM 990-N SUBMISSIONS**

## Example of Tax filing confirmation letter from your Club's CPA

**MYRA APPEL CPA L.L.C.**  
61 HUMMINGBIRD LN  
WHITEFISH, MT 59937  
(406) 862-4057

December 4, 2017

ROTARY INTERNATIONAL  
WHITEFISH ROTARY CLUB  
PO BOX 1845  
WHITEFISH, MT 59937-1845

FEDERAL ID: 81-6019186

Dear Client:

Your Federal Return of Organization Exempt from Income Tax was acknowledged as accepted by the Internal Revenue Service on November 2, 2017. No tax is payable with the filing of this return. If you have questions about the return, please call the IRS Tax Help number, 1-800-829-4933.

Please be sure to call if you have any questions.

Sincerely,

Myra A. Appel



# DISTRICT 5390 GRANT QUALIFICATION MOU AND FMP

- After the Stewardship committee has reviewed the uploaded forms, check the Matching Grants Qualification website to see your club status.
- Green means your club has qualified to apply for DDF.



Developed by District 5340  
for use by the entire Rotary world



Grants Website Administration

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Anaconda	Karla Dedman	karlamdedman@yahoo.com	Diane Brunell	dbrunell@firstmontanabank.com	✓	✗	✗	✗	✗
Big Sandy					✗	✗	✗	✗	✗
Big Sky	Laura Seyfang	lauraseyfang@sbcglobal.net	Blair Mohn	bbmgreen@mac.com	✓	✗	✗	✗	✗
Bigfork	MonaRae Tuhy	thunderglorymobile13@gmail.com	Tim Nolan	tnnnolan@gmail.com	✓	✓	✓	✓	✓
Billings	Mike Mayott	billings999pe@gmail.com	Tyler Bush	tylerb@mckinstry.com	✓	✓	✓	✓	✓
Billings West	Michael Magone	msmagone@yahoo.com	Pam Bailey	pjbailey@wtp.net	✓	✓	✓	✓	✓
Bozeman	Cindy Sease	csease@dailychronicle.com	John Patterson	jspatterson972@gmail.com	✓	✓	✓	✓	✓
Bozeman Sunrise	Jason Smith	jasonaldensmith@yahoo.com	Katie Madison		✓	✓	✓	✓	✓
Butte	John Winston	jwinston@glacierbank.com			✓	✗	✗	✗	✗
Columbia Falls					✗	✗	✗	✗	✗
Deer Lodge					✗	✗	✗	✗	✗
Dillon	Richard Achter	dachter@barretthospital.org	Mike Blando	mikeblando0717@gmail.com	✓	✓	✓	✓	✓
Evergreen	Malinda Shafman	dg5390.2016@gmail.com	Robbie Mathiason	robbiemathiason@cushingerterrell.com	✓	✓	✓	✓	✓
Glacier					✗	✗	✗	✗	✗

# DISTRICT 5390

## District Grant Qualification

Thank you!

Questions?





# MONTANA ROTARY DISTRICT 5390

## AUDITOR COMMENTS

**Significant problems encountered when not using the correct form ;  
where that report is placed; and timing of reporting**

**Duane Johnson, Rotary Club of Bigfork Reports delinquent affect  
future Grant Applications**

# REPORTING

- PLEASE go to MontanaRotary.Org
  - District's Progress Report (July 2018) in 2 locations:
    - Progress Report Form for All District Grants (in File List)
    - PROGRESS REPORT for District Grant (Download dropdown)
  - This form should be used for any Rotary 5390 District Grant
- If the project is not completed or has not been started the District Grant Progress Report is due by December 1<sup>st</sup> and again on June 1<sup>st</sup> until the project is completed.
- If project is completed, please complete the online Final Report on the MatchingGrants.org website.

# PROJECTS AS OF 2019 GRANTS (NO NEW 2020 GRANTS)

Grant Number	Club Name	Last Report Date	In Compliance for 2020	Final
2631	Bigfork	06/30/2020	X	
2629	Red Lodge	01/24/2020		
2627	Livingston	_____		
2622	Bozeman	06/24/2020	X	
2621	Townsend	06/24/2020	X	
2619	Helena Sunrise	05/31/2020	X	
2616	Whitefish	05/27/2020	X	07/03/2020
2614	Missoula Sunrise	_____		
2578	Miles City	_____		
2576	Anaconda	06/03/2020	X	
2050	Bozeman	07/08/2020	X	