

DISTRICT GRANT ONLINE APPLICATION TRAINING



DISTRICT GRANT CLUB WORKSHEET

WELCOME TO THE GRANTS PAGE

You may choose to compile your information using this club worksheet.

This is not an application and is not to be submitted to the District. It is simply a tool to help you gather your information that will be needed for the online application.

www.rotarydistrict5650.org

Foundation > Grants

GRANTS

Welcome to Grants

[Welcome to the Grants Page](#)

Forms - Always Apply (not year specific)

[Grant Terms and Conditions - Rotary International](#)

[The Rotary Foundation Code of Policies](#)

[Grant Areas of Focus](#)

[District Grants Money Management](#)

[District Grants Project Management - Lifecycle](#)

2017-18 Rotary Grants

[2017-18 Grants Memorandum of Understanding](#)

2017-18 Rotary District Grant Project Tools

[2017-18 Club Worksheet for District Grants](#)

[2017-18 District Grants Process and Timeline](#)

District Grant Projects

[2016-17 District Grants Approved](#)



GRANTS 2017-18 - GENERAL FOR ALL TYPES OF GRANT PROJECTS

1. All Clubs must get certified each Rotary Year to participate in any grant (District, Global). Certification qualification includes:
 - a. 2017-18 Memorandum of Understanding ([click here](#))
 - b. Grants Management Seminar (GMS)
 - 1) At least 2 Rotary Club Members must participate to certify club **REQUIRED - members completing grant applications must participate in a GMS.**
 - 2) GMS events for 2017-18 grants will all be by webinar as follows:
 - Thurs 6-Apr 6:30 PM GMS Webinar
 - Tues 18-Apr 5:30 PM GMS Webinar
 - Mon 1-May 6:30 PM GMS Webinar
 - Wed 17-May 5:30 PM GMS WebinarTo Register for a GMS [click here](#) and select the event from the drop-down menu.
 - 3) You must participate in the entire seminar to get credit
 - c. Adherence to all The Rotary Foundation (TRF) and District requirements
2. All Clubs, including the lead Club and any participating Clubs, must meet these requirements
3. Certification qualifications are for one Rotary Year only (Rotary years are from July to June)

DISTRICT GRANTS 2017-18

1. May 31 - Application deadline for District Grants 2017-18
2. Applications for District Grant Projects will be entered through the District Website starting in 2017-18 (additional information follows)
 - a. Clubs must first be certified (see above) to have access to the online application
 - b. Club members must be certified to get access to the online application to enter a district grant project application; those members must participate in a GMS
 - c. Application, reports, supporting documents, etc. will be attached through the District Website online application screens
 - d. We will hold District Grant Application Webinars on using the online application

Rotary



Rotary District 5650



WELCOME TO ROTARY DISTRICT 5650

While the power of Rotary is in the local clubs, there is strength in numbers. The Rotary clubs of Eastern Nebraska and Southwest Iowa are members of District 5650, which provides leadership, representation, and direction.



WWW.ROTARYDISTRICT5650.ORG



About Us ▾

Exchange Ideas ▾

Learning & Reference ▾

The Rotary Foundation ▾



Member Login

Rotary



District 5650

Logon to the District Website



About Us ▾

Exchange Ideas ▾

Learning & Reference ▾

The Rotary Foundation ▾

My District ▾



Nicki Klein

Member Area

Logout

Rotary



District 5650

After logon select Member Area



Rotary



WWW.ROTARYDISTRICT5650.ORG MEMBER AREA / ADMINISTRATION PAGE

District 5650

Welcome, TestMember [Logout] | Admin | Home Page |

Admin | For Clubs | **Grants** | For Members | Membership | Contacts (Beta) | Organization | Communication | Website | Documents | Reports | Attendance | Events | New Bulletin (Beta)

Help

Submit a Grant Request | My Club Grants | District Grants |

Help

Support

Downloads

Service Updates

Submit a Ticket

ClubRunner Add-Ons

MyEventRunner

Online Payment & eCommerce Module (US)

Online Payment & eCommerce Module (Canada)

Administration

Latest Updates - Release Notes Available on [Service Updates](#) page.

Home Page Editing

Home Page Stories

Story Management

Edit Home Page Links

Download Files

[Site Pages Management](#)

Photo Albums Management

[Documents Download](#)

Website Sponsoring Area

Website Sponsoring Guide

Website Designer 3.0

Edit Meta Tags

District, Clubs & Membership

District Dashboard

Club & Membership Detail

Member Detail

Request Member Updates

Member Access Rights

Clubs Attendance Management

Edit Executives and Directors

Download Member Data

Member Data Changes

RI Integration Archive | Member Synchronization

Reports



DISTRICT GRANT ONLINE APPLICATION

Admin For Clubs **Grants** For Members Membership Organization Communication Website Documents Reports Attendance Events Contacts (Beta) New Bulletin (Beta) Help

Submit a Grant Request My Club Grants District Grants

Submit a Grant to Start

Once started – to add, review select My Club Grants

Submit a Grant

Clubs must be certified before beginning a District Grant Application. To be certified:

- Memorandum of Understanding - if your club has not yet submitted the [MOU](#) you can find it here ([click here](#))
- Attendance at Grants Management Seminar (GMS)
 - at least 2 club members must participate in a GMS
 - find a list and register through the Rotary District Calendar or the Grants Page ([click here](#))
- Contact districtgrants@rotarydistrict5650.org with questions at any time

Start your grant application by entering basic information below.

- Project Name - very short - this will become the Subject Line of emails - no more than 25-30 characters
- Project Year - the upcoming Rotary year starting the next July 1
- Description - make this a very short description; briefly explain the proposed District Grant Project - what you will be doing, who it will benefit and what humanitarian need it fills
- Estimated Budget - the total amount of the District Grant Project. For larger projects, enter only the amount that Rotary will be managing. Enter the total of:
 - the amount that your club will be providing,
 - the amount other Rotary Clubs are providing, and the requested District Grant Match
 - District Grant Project Amounts*
 - Single Club District Grant Projects
 - \$1,500 - Max Match (Clubs can invest more but the max match will be \$1,500)
 - \$500 - Min Amount from Club (matched to make a \$1,000 project)
 - Multi-Club District Grant Projects
 - \$4,500 - Max Match (Clubs can invest more but the max match will be \$4,500)
 - \$1,500 Max Match for any one club
 - to get \$4,500 would need at least 3 clubs at \$1,500 each
 - \$300 - Min Amount from any Club
 - Clubs do not need to all invest the same amount

Multi-Club Grants - submit this form only once - by the Lead Club.

DISTRICT GRANT ONLINE APPLICATION

Project Name: *

Please select the year this project will be completed. Once selected, the year cannot be changed.

Project Year: *

Sponsoring Club:

Contact:

Country:

State:

Zip Code:

City:

Description: *

Estimated Budget:

Change to 2017-18 for current applications

This is a set up screen only.



DISTRICT GRANT ONLINE APPLICATION

District 5650

Welcome, TestMember [Logout] | Admin | Home Page |

After the set-up screen, go back to add the details.

Admin For Clubs **Grants** For Members

Help

Submit a Grant Request | My Club Grants | District Grants |

Communication Website Documents Reports Attendance Events New Bulletin (Beta)

Help

Support
Downloads
Service Updates
Submit a Ticket

ClubRunner Add-Ons

Administration

Latest Updates - Release Notes Available on [Service Updates](#) page.

Home Page Editing

Home Page Stories
Story Management
Edit Home Page Links

District, Clubs & Membership

District Dashboard
Club & Membership Detail
Member Detail

Grant Request Applications

« Previous Year | **2017-18** | Next Year »

Submitted	Project Name	Sponsoring Club	Estimated Budget	Grant Amount	
Under Review					
Apr 02, 2017	Memorial Park Landscaping	Rotary Club of Lincoln South - Lincoln, Nebraska (NE) USA	\$3,000.00	\$0.00	Open

Select the grant from the list – click the name or open



DISTRICT GRANT ONLINE APPLICATION

District 5650 [Submit Feedback](#)

Admin For Clubs Grants For Members Membership Organization Communication Website Documents Reports Attendance Ev (a) Help

Go back

Memorial Park Landscaping

Grant Project: Memorial Park Landscaping
Primary Sponsoring Club: Rotary Club of Lincoln South - Lincoln, Nebraska (NE) USA
Contact: GrantManager, TestMember
Date Submitted: Apr 02, 2017 at 9:32 AM
Project Total Budget: \$3,000.00
Project Total Financing: \$0.00
Requested Grant Amount: \$0.00

Status: **Under Review** (Request opened for view.)
[Request More Information](#)
[Cancel Grant](#)

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived

Click on any of the tabs below to access and update the various sections of this District Grant Project application.

[Details](#) [Application](#) [Budget](#) [Documents](#) [Project Overview](#) [Individual Project Report](#) [Activity Log](#)

All screens will include the brief information about the project

Status box – used to communicate between club and district at various stages

Tabs for various sections



DISTRICT GRANT ONLINE APPLICATION

Details Application Budget Documents Project Overview Individual Project Report Activity Log

Local Club Partners

List any Rotary Clubs within the District contributing funds and resources toward the project.

All Rotary Clubs - the Lead Club and all Partnering Clubs - must be certified (and verified) by the District.

Note that only one grant application needs to be made by the Lead Rotary Club.

For initial grant project application, complete Details, Application and Budget tabs.

Documents – optional – if you have supporting documentation.

[+ Add Club](#)

Club	Contact Name	Contribution	Actions
<i>No club specified</i>			

Other Partners

Provide the name and contact information of any cooperating organization (other than Rotary Clubs or the beneficiary of the District Grant Project).

[+ Add Partner](#)

Club	Contact Name	Actions
<i>No club specified</i>		



DISTRICT GRANT ONLINE APPLICATION

Details **Application** Budget Documents Project Overview Individual Project Report Activity Log

▶ General Description

▶ Community Assessment & Impact

▶ Sustainability

▶ Cooperating Organizations

▶ Implementation Plan

On Application tab, select and complete each category.

Select the arrow to open the category.

Edit

▼ Sustainability

Please explain the plan on how to maintain this project for a long period of time.

Is there a need for the project or program to continue beyond the District Grant Project?

How will the beneficiary provide for the continuation of the project or program?

What is the plan for maintenance of any physical product (playground equipment, park benches, trail markers, etc.) of the project or program?

Edit



DISTRICT GRANT ONLINE APPLICATION

Details Application **Budget** Documents Project Overview Individual Project Report Activity Log

- Expected Expenses and Income
- Funds that Rotary will manage
- Single Club District Grant Projects
 - \$1,500 - Max Match
 - \$500 - Min Amount from Club
- Multi-Club District Grant Projects
 - \$4,500 - Max Match
 - \$1,500 Max Match for any one club
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 - Clubs do not need to all invest the same amount

Budget Tab

Items to include

Amount Guidelines



DISTRICT GRANT ONLINE APPLICATION

Details Application **Budget** Documents Project Overview Individual Project Report Activity Log

Expected Expenses

List the anticipated expenses for this District Grant Project.

For larger projects, list only the expense items that will be managed by / covered by Rotary.

District Grant Project Funds are restricted to specific uses such as:

1. the funds cannot be used to support any fundraising activities
2. the funds must be used for specific items and cannot be give to an organization for unrestricted use; checks are only to be written to an organization after being presented with an invoice / receipt for a specific item
3. review all of the Rotary International and District documents for additional restrictions on the use of District Grant Project funds

[Edit Help Text](#)

Description	Supplier	Local Amount	Currency	Tax	Total	Amount	Actions
<i>This club has no expected expenses.</i>							

[+ Add A Budget Item](#)

Add Budget Item /
Expected Expense



DISTRICT GRANT ONLINE APPLICATION

Details Application **Budget** Documents Project Overview Individual Project Report Activity Log

Add Budget Item

Budget Item Details

Date: 

Description: *

Supplier:

Local Amount:

Local Tax: (USD)

Exchanged Amount:

[Cancel](#) [Create](#)

No need to change the date on this screen

List all of the planned / estimated items to be purchased

Create individual Budget Items so that we have a listing / breakdown of the project purchases (multiples of the same item can be listed together such as 3 Child Chairs @ \$24.99 then show the total in Local Amount)



DISTRICT GRANT ONLINE APPLICATION

Details Application **Budget** Documents Project Overview Individual Project Report Activity Log

Add Project Financing /
Expected Income

+ Add Project Financing

Expected Income

List all anticipated income for this District Grant Project. For larger projects, list only the funds that will be managed by Rotary.

Include all Rotary Club Funds and District Grant funds. All funds must be deposited to the account set up for managing grants.

Estimated Budget - the total amount of the District Grant Project. For larger projects, enter only the amount that Rotary will be managing. Enter the total of:

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* Amounts are under review and have not yet received final approval but these are likely final.

[Edit Help Text](#)

Description	Funding Source	Amount	%	Actions
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This club has no expected income.



DISTRICT GRANT ONLINE APPLICATION

Details Application **Budget** Documents Project Overview Individual Project Report Activity Log

Add Financing

Financing Details

Date: Apr 27, 2017  *

Description:

Funding Source: District Grant Club/Other *

Local Amount: 0.00 US Dollar (USD)

Amount: 0.00

No need to change the date on this screen

List each Rotary Club separate for multi-club projects

List Matching Grant Request separate from Club funds

Cancel **Add**



DISTRICT GRANT ONLINE APPLICATION

Details Application Budget **Documents** Project Overview Individual Project Report Activity Log

Project Documents

Attach (upload) all related documents and files for this grant

- For your application, you are welcome to attach supporting documentation.
- For your grant reports, this is where you will attach Receipts, Invoices, Bank Statements, and Check Images.
- You are welcome to add photos for your grant project here as well.
- The district may also attach files that apply to your grant project or club.

Search:



Documents and folders are sequenced alphabetically. Drag and drop documents and folders to move them from one folder to another or to change the parent folder.

Name ▼	Updated On ▼	Updated By ▼	Actions
<input type="button" value="Collapse All"/> <input type="button" value="Expand All"/>			

If you wish to add supporting documentation, use this tab.

This is a great way to keep your records for this project.



GRANT PROJECT REPORTS



DISTRICT GRANT REPORT

District Project Reports are due:

- 12-31 – can be progress report or final report
- 3-31 – project completion deadline

DISTRICT GRANT REPORT

Details Application Budget Documents Project Overview **Individual Project Report** Activity Log

Print Submit

Project Description

Answer the questions in the box below as the Project Description part of the report.

Reports are due 12-31 and 3-31.

Click below each question / statement and type your response.

Submit

Is this the project final report?

If this is not the final report, complete as much of the information below as appropriate at this time:

- Describe the project.
 - What was done?
 - When was it done?
 - Where did the project activities take place?
- Beneficiaries of the project
 - Who were the beneficiaries?
 - What humanitarian need was met, how were the beneficiaries impacted by this project?
 - How many people benefited from this project?
- Rotarian involvement (other than financial support)
 - How many Rotarians participated in this project?
 - What did the Rotarians do?



DISTRICT GRANT REPORT

Financial Report

Total Income and Total Expenses should be equal.

FIRST ENTER:

all Income Items. For multi-club projects list each Rotary Club's contributions individually.

SECOND ENTER:

each expense item.

THIRD ATTACH TO THE DOCUMENTS TAB:

- bank statements from initial deposit until final check has cleared
- check images
- receipts and invoices for all expenses

Scroll down to the bottom of the page to complete the Financial Report

[+ Add Income Item](#)

Date	Description	Funding Source	Amount	%	Actions
			Total:	\$0.00	—

[+ Add Expense Item](#)

Description	Supplier	Local Amount	Currency	Tax	Total	Amount	Actions
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DISTRICT GRANT REPORT

Add actual Income – list each item individually

Date:  *

Description:

Funding Source: District Grant Club/Other *

Local Amount:

Amount:

Add actual expenses – listing each individually

Date:  *

Description: *

Supplier:

Local Amount:

Local Tax: (USD)

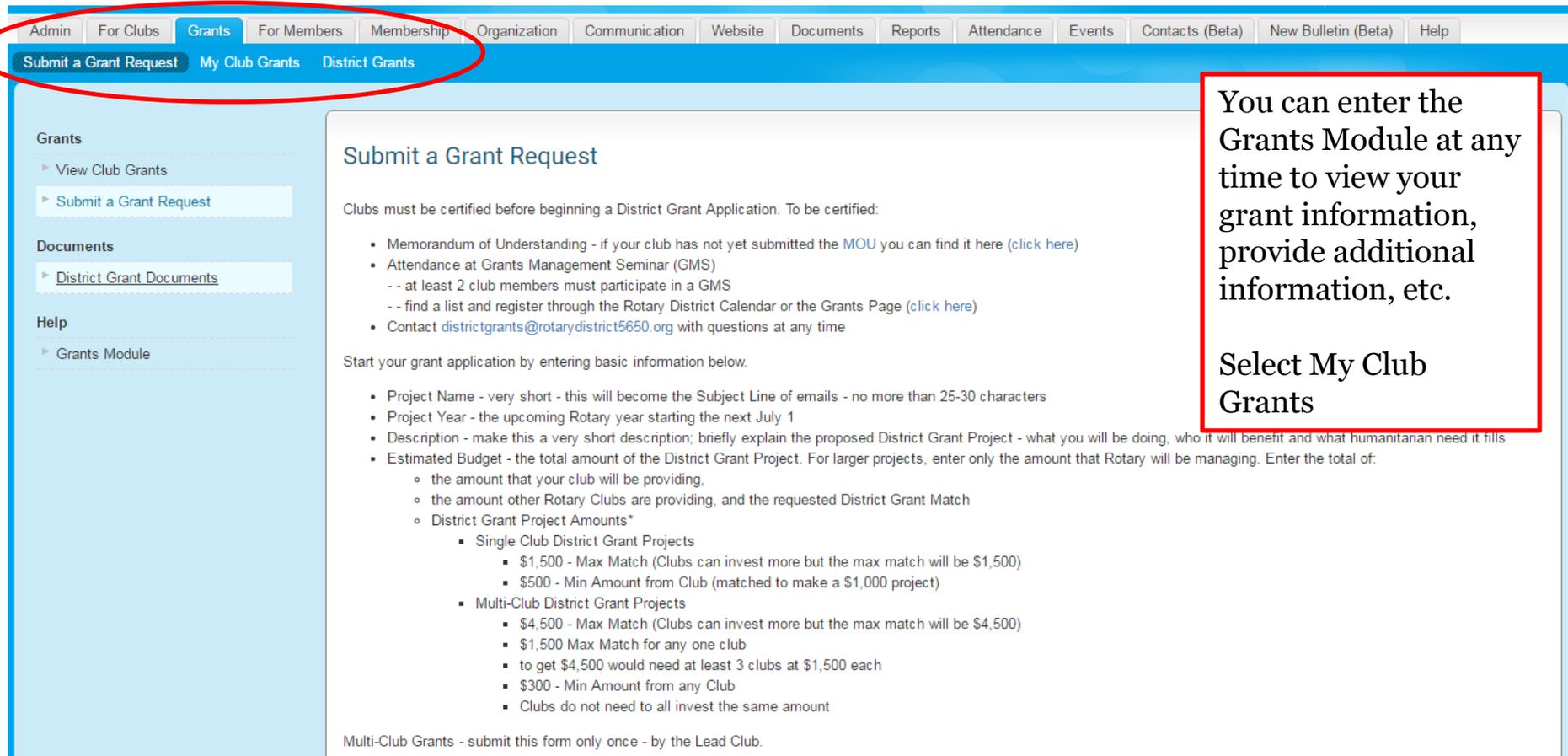
Exchanged Amount:



STATUS CHANGES



DISTRICT GRANT ONLINE APPLICATION



Admin For Clubs **Grants** For Members Membership Organization Communication Website Documents Reports Attendance Events Contacts (Beta) New Bulletin (Beta) Help

Submit a Grant Request My Club Grants District Grants

Grants

- ▶ View Club Grants
- ▶ **Submit a Grant Request**

Documents

- ▶ **District Grant Documents**

Help

- ▶ Grants Module

Submit a Grant Request

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Multi-Club Grants - submit this form only once - by the Lead Club.

You can enter the Grants Module at any time to view your grant information, provide additional information, etc.

Select My Club Grants



DISTRICT GRANT ONLINE APPLICATION

Details Application Budget Documents Project Overview Individual Project Report **Activity Log**

Project Activity Log

+ Add

Here you can see all actions performed on this request application.

Filter records:

Date	Actions
Apr 02, 2017	Status Changed from "Initial Request Submitted" to "Under Review" <i>Nicki Klein: Request opened for view.</i>
Apr 02, 2017	Grant Request Submitted.

The Activity Log will be a history of the status changes of your grant as well as communications between the District and the Club Contact.

- List of Status Changes
- Requested Information added through Log



DISTRICT GRANT – EMAIL NOTIFICATIONS

Email notifications generated through the system are sent only to the Club Contact of the grant project.

These email notifications may simply provide information but may also be a request for action.



From: District 5650 <mailservice@dubrunner.ca> Sent: Sun 4/2/2017 2:30
To: Nicki Klein
Cc:
Subject: Rotary Club of Lincoln South - Lincoln, Nebraska (NE) USA grant request "Memorial Park Landscaping" status

The request for the Rotary Club of Lincoln South - Lincoln, Nebraska (NE) USA's grant Memorial Park Landscaping has been received by the District Grants Committee.

You can review the status or details of requested items for the grant at any time by logging into www.rotarydistrict5650.org. Enter the Member Area, click the Grants menu link, then select My Club's Grants. View the log to determine if there are any requirements.

After providing any additional information requested, please select the Provide Information button on the top right of the Grants screen to notify the District Grants Committee that you have completed the request.

Status: **Awaiting Further Information** *(Please provide detailed budget information using t)*

If you have any questions, contact districtgrants@rotarydistrict5650.org.

Sincerely,
District 5650 Grants Committee

DISTRICT GRANT – EMAIL NOTIFICATIONS

Status: **Awaiting Further Information** (Please complete the Expense Area of the Budget Tab)

Comments:
The Expense information has been added.

No comments

- Select the Provide Information Button
- Enter a comment and Send
- That files the information to the Log and notifies the District that you have completed the request