Rotary
District 5340

District Grants - Training

March 29, 2025

Alan Turner

The Rotary Foundation

Today's Agenda

- What are District Grants?
- District 5340 Policies
  - Is your club eligible?
- How to Apply for a District Grant
- Once Approved – What Next?

District Grants

- Smaller activities and projects ($500 minimum)
- Simple, flexible, innovative
- Local decision making with broader guidelines
- Administered by the District
- DDF matching funds up to $3,000
  - Your club may submit multiple grant requests, combined limit of $3,000 DDF
  - Your club can combine with other clubs
- All applications and reporting done online on matchinggrants.org

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Donation to Annual Fund SHARE

Donation is invested for 3 years; growth supports Foundation operations.

SPENDING DECISIONS SHARED

World Fund
(Trustee discretion)

GLOBAL GRANTS AND PROGRAMS*

District Designated Funds (DDF)
(District discretion)

DISTRICT GRANTS | GLOBAL GRANTS

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District Designated Funds (DDF)

- Our District 5340 receives DDF from The Rotary Foundation (TRF)
  - As a result of your giving to TRF 3 years ago
- In 2024-2025 we received $141,052 designated for District Grants
  - We funded 108 projects

Examples of District Grants

Policies - Eligibility

Is your Club eligible to apply for District Grants?

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Selected Policies for 2025–2026 District Grants

- District Grant Applications must be submitted on www.matchinggrants.org/district on or before **August 1, 2025**.
- **Two Club members** must complete the District Grant Training and pass the quiz.
  - Primary Contacts for projects are strongly encouraged to attend and complete the training.
- Approval of District Grants may be based on Clubs correctly closing prior District Grants.
- The Rotary club requesting DDF must have contributed either a minimum of $50 per capita to the Annual Fund or a total of $5,000 to the Annual Fund of The Rotary Foundation for the 2024-2025 Rotary year.

- Be current on all District and Global Grant reporting.
- Be current on Rotary International and District dues.
- Enter Rotary Foundation giving goals on MyRotary.org by August 1, 2025
- Ensure projects comply with the District 5340 Youth Protection Policy if applicable.

Selected Policies for 2024-2025 District Grants (continued)

- Grants will be awarded at the first District Rotary Foundation Committee meeting held after August 1, 2025.

- The Project Primary Contact, along with the Club President or Club Treasurer, must electronically sign the grant application and final report.

- **Final Reports to close District Grants are due April 1, 2025**, or within 30 days after completion of the project.

How to Submit a District Grant Application

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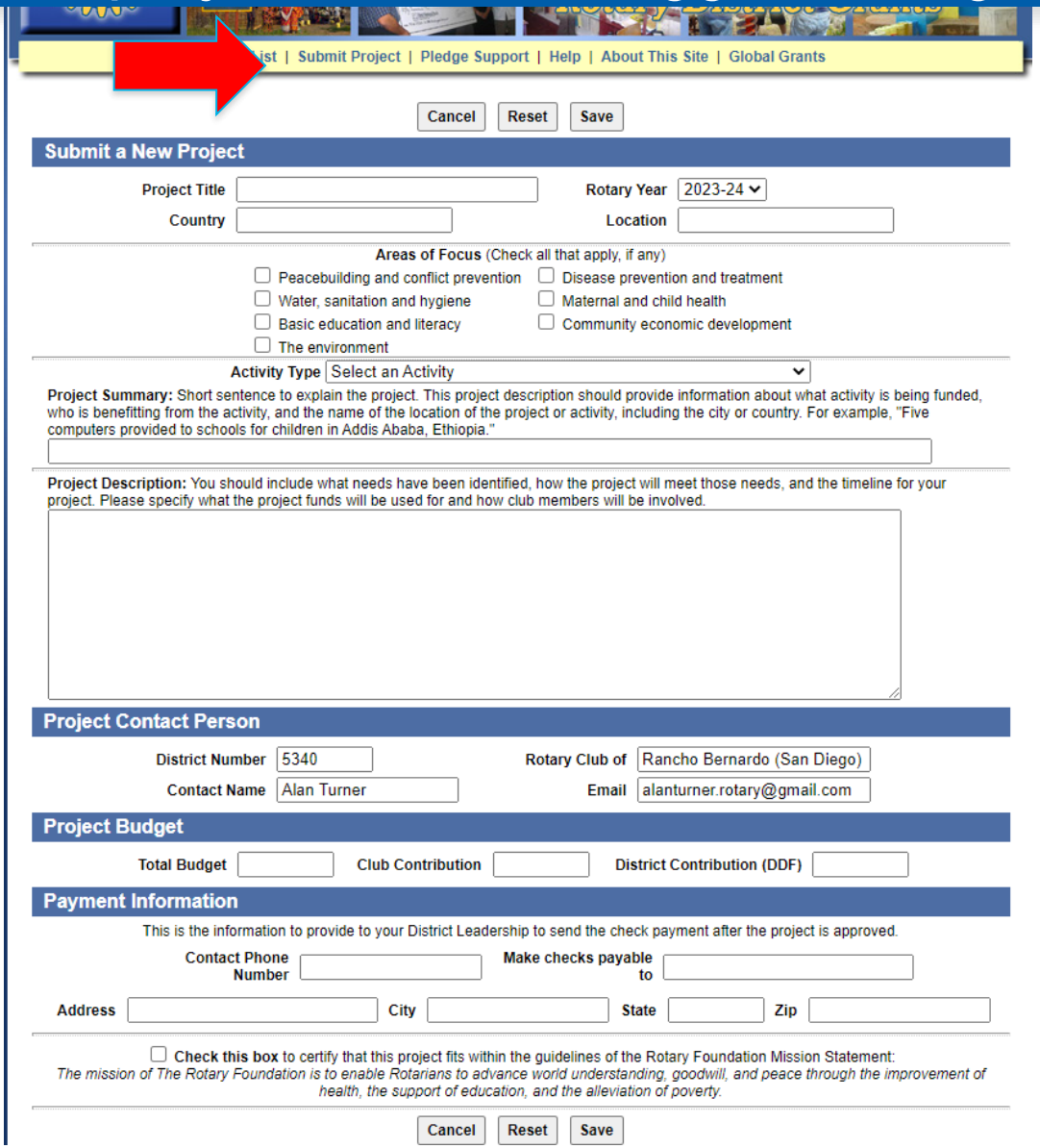
URL “matchinggrants.org” and then click on District Grants

Submit a new project on Matchinggrants.org



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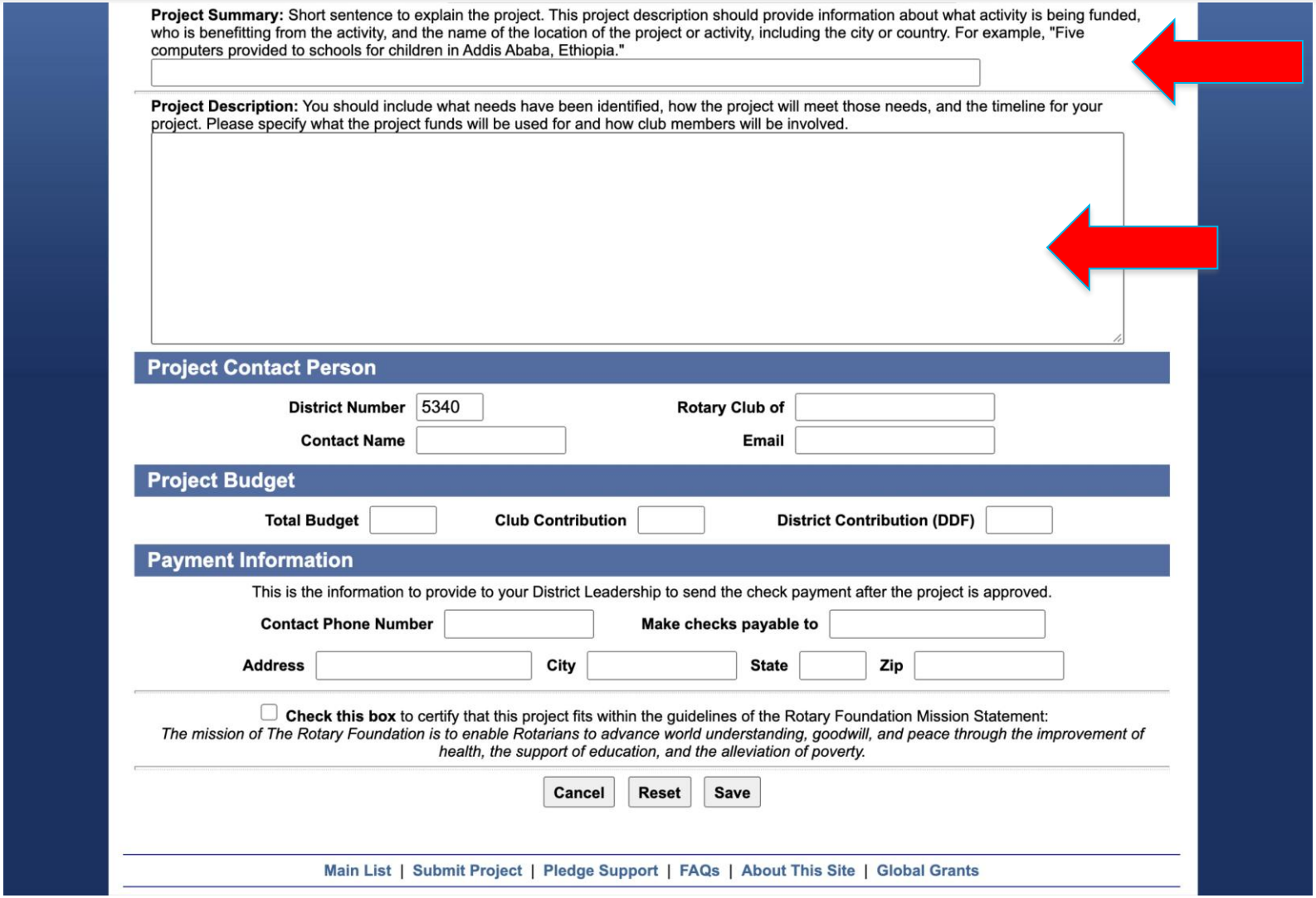
Select the Rotary Year for the project and Activity Type

Project Summary and Project Description



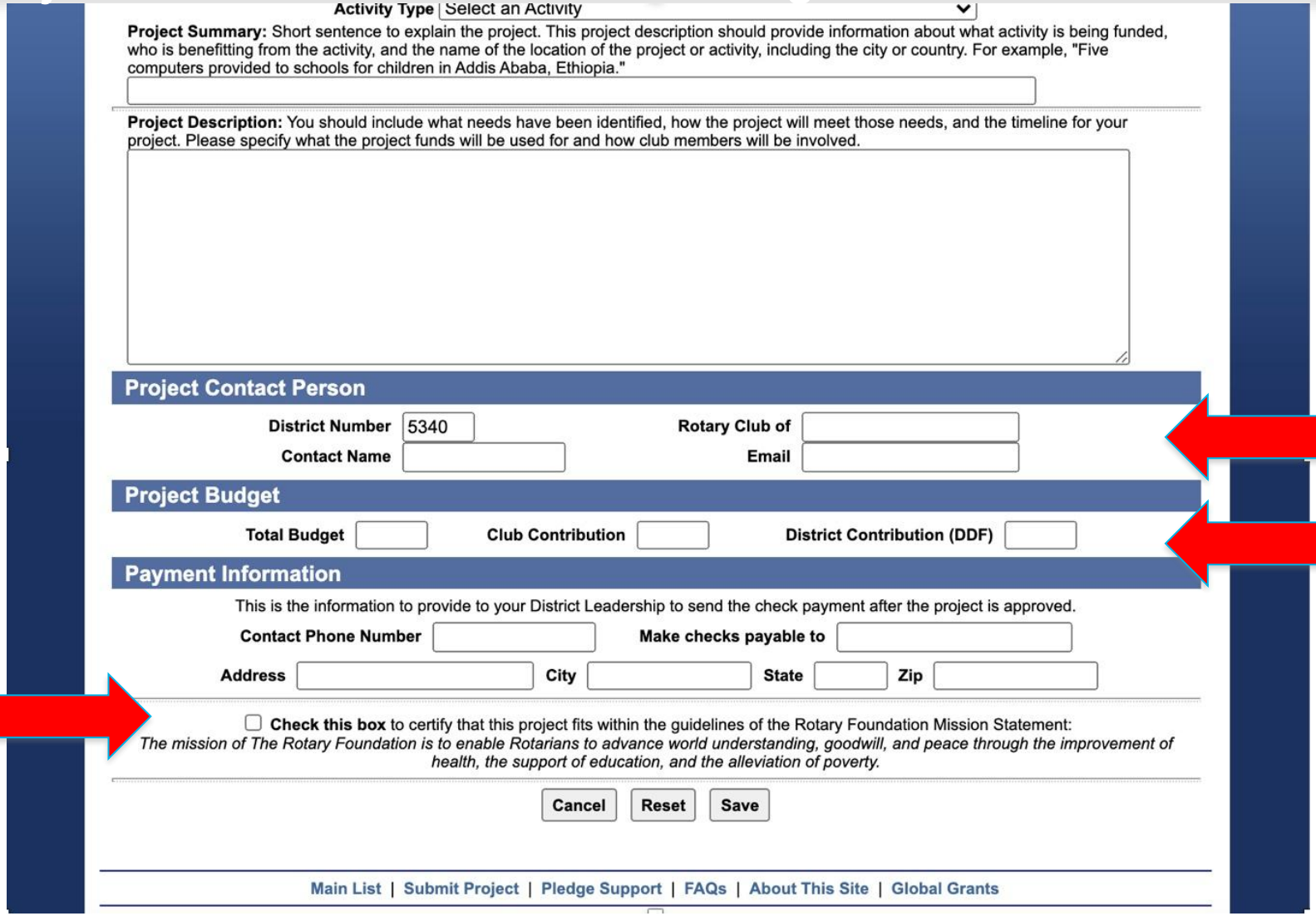
Explain your Project Summary

- Short sentences to explain summary
- What activity is being funded
- Who is benefitting from the activity
- Name of the location of the project or activity, including the city or country
- For example, "Five computers provided for computer lab students in Ecuador”

Explain your Project Description

- Short sentences to explain your description
- What needs have been identified
- How the project will meet those needs
- The timeline for your project
- Please specify the use of project funds
- How will club members be involved

Project Contact Person and Budget Information



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Proposed Budget and Contact Person

- Very important to have Project Contact Person see the project to its conclusion. All grant communication will be sent via email to that club member.

- Project Total Budget amount includes
  - Club contribution
  - District Contribution (DDF) up to $3,000.

DDF Funds Deposit Information

Rotary District 5340
District Grant, DDF, Deposit Information

Club Name

Project Name, Number(s)

Bank Name

Bank Routing Number

Account Name (Registration)

Account Number

Account Type: ☐ Checking or ☐ Savings

Contact Person Name

Contact Information

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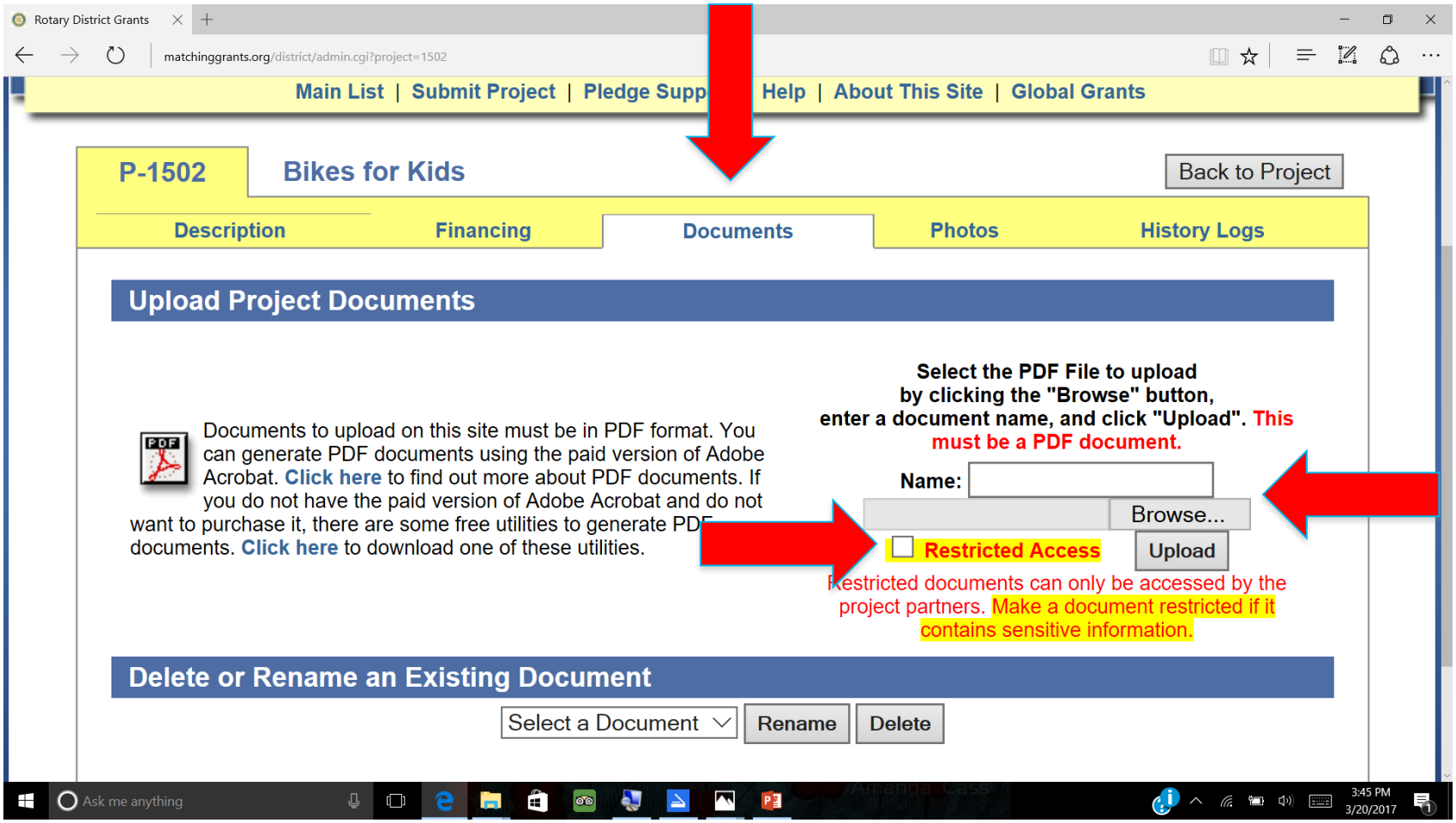
Payment Information to receive District Designated Funds

- Grant payments will be made directly to the Clubs, not institutions involved in the grant.
- Complete DDF Bank Deposit Form with Account Name, specify Checking or Savings, Bank name, Account number and Bank routing number.
- The deposit information form can be found on the District website

- Upload deposit information form as a “restricted access” document. One form for each grant.

Loading Restricted PDF Documents



Grant is complete and ready to Submit

- Once the entire form has been completed with correct information, box checked, and all signatures obtained, you can click Save and Submit Grant
- District Foundation Committee members will be notified that your grant has been submitted
- Grant will be considered for approval at the meeting of the District Rotary Foundation Committee after **August 1, 2025**

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What Next?

District Grant is approved, what happens next ?

- You will receive an approval notification, via email from matchinggrants.org
- In about 4 to 5 weeks The Rotary Foundation approves the District 5340 District Grant application (encompassing all District Grants)
- Once funds are received from TRF, the District Foundation Treasurer will deposit DDF directly to club bank accounts via ACH transfer
  - Assuming that you have provided Bank Details
  - Please inform Treasurer that the funds have been received

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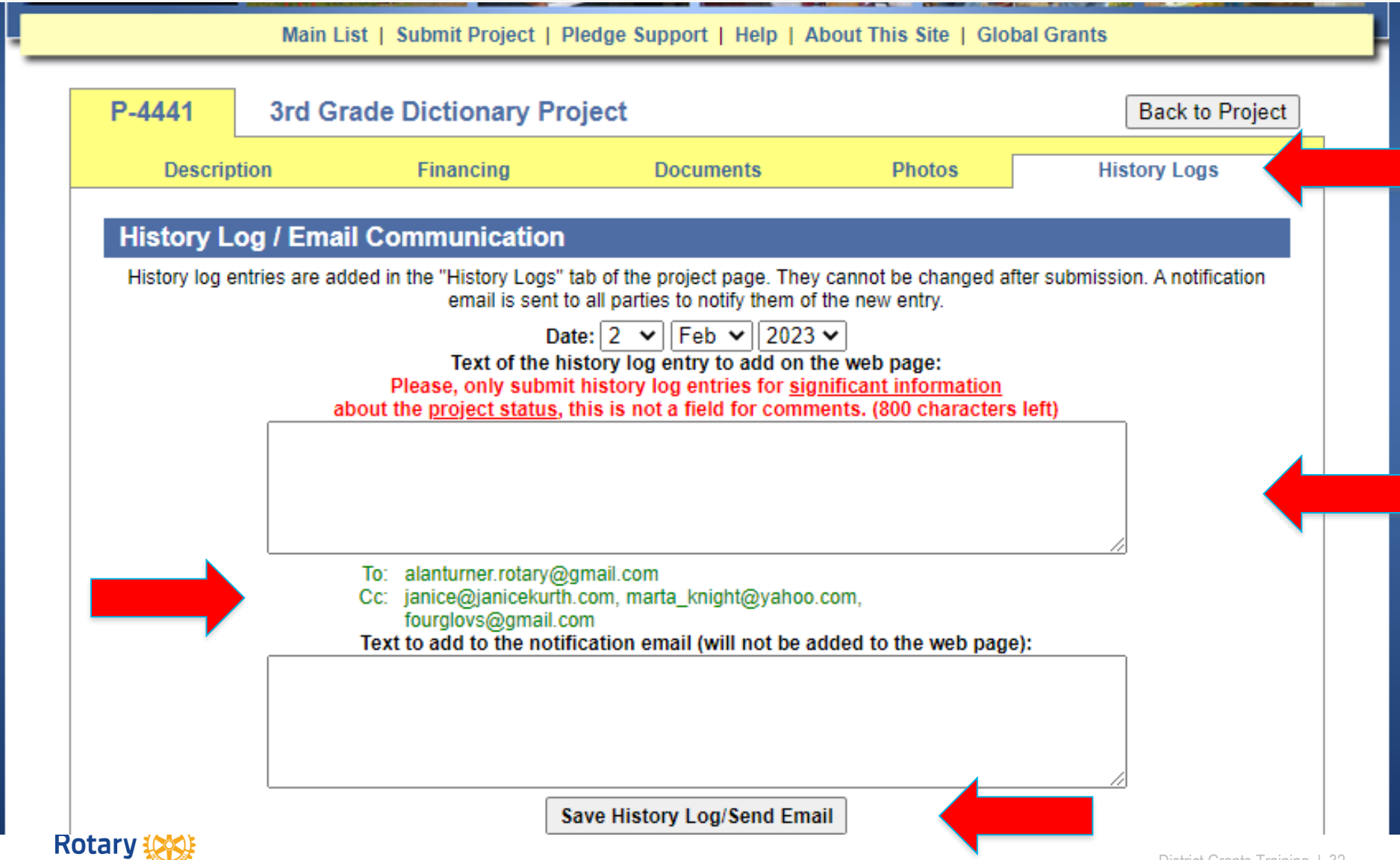
District Grant is approved, what happens next ?

- **Do not spend any money before funds arrive**

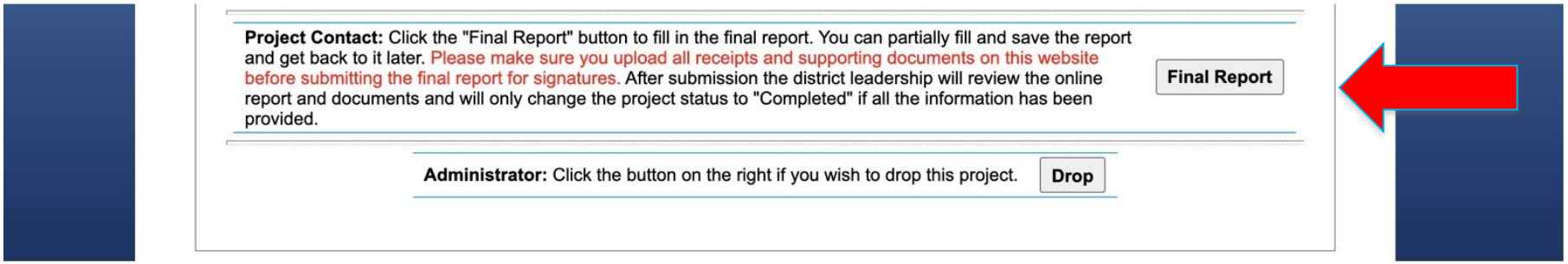
District matching funds have arrived, what next?

- Document and save proof of your expenses showing funds were spent for the project
  - store receipts, cancelled checks, invoices marked paid from vendors
- Scan all to PDF format, then upload to "Documents" page of District Grant. Start by clicking "Administration" box.

Adding comment to History Log



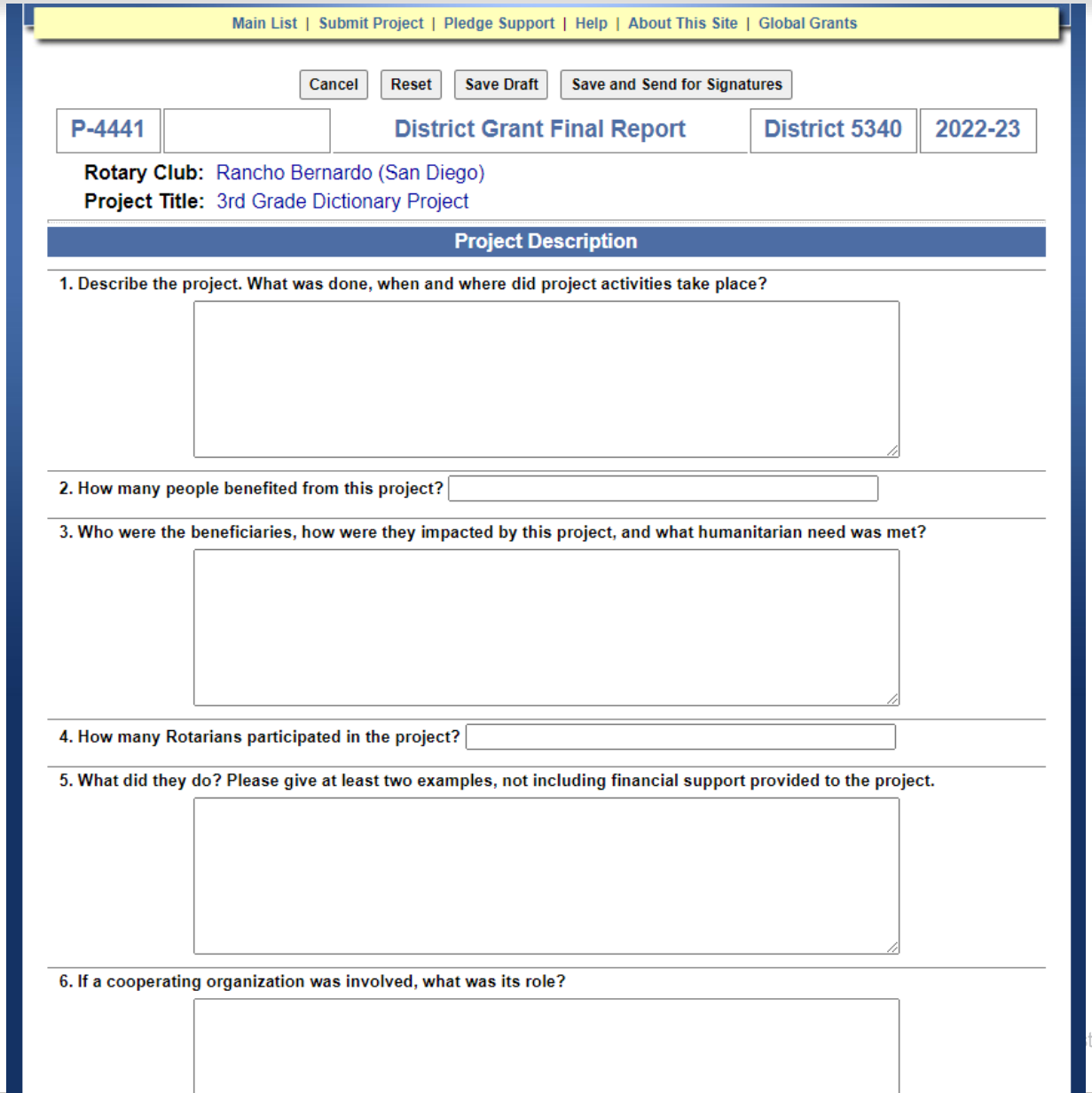
Description Page, Submitting the Final Report



The project is complete, and receipts have been uploaded.

Click the “Administration” button
- Description tab
- “Final Report”

Final Report questions 1 - 6



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

Cancel | Reset | Save Draft | Save and Send for Signatures

P-4441 | District Grant Final Report | District 5340 | 2022-23

Rotary Club: Rancho Bernardo (San Diego)

Project Title: 3rd Grade Dictionary Project

Project Description

1. Describe the project. What was done, when and where did project activities take place?

2. How many people benefited from this project?

3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?

4. How many Rotarians participated in the project?

5. What did they do? Please give at least two examples, not including financial support provided to the project.

6. If a cooperating organization was involved, what was its role?

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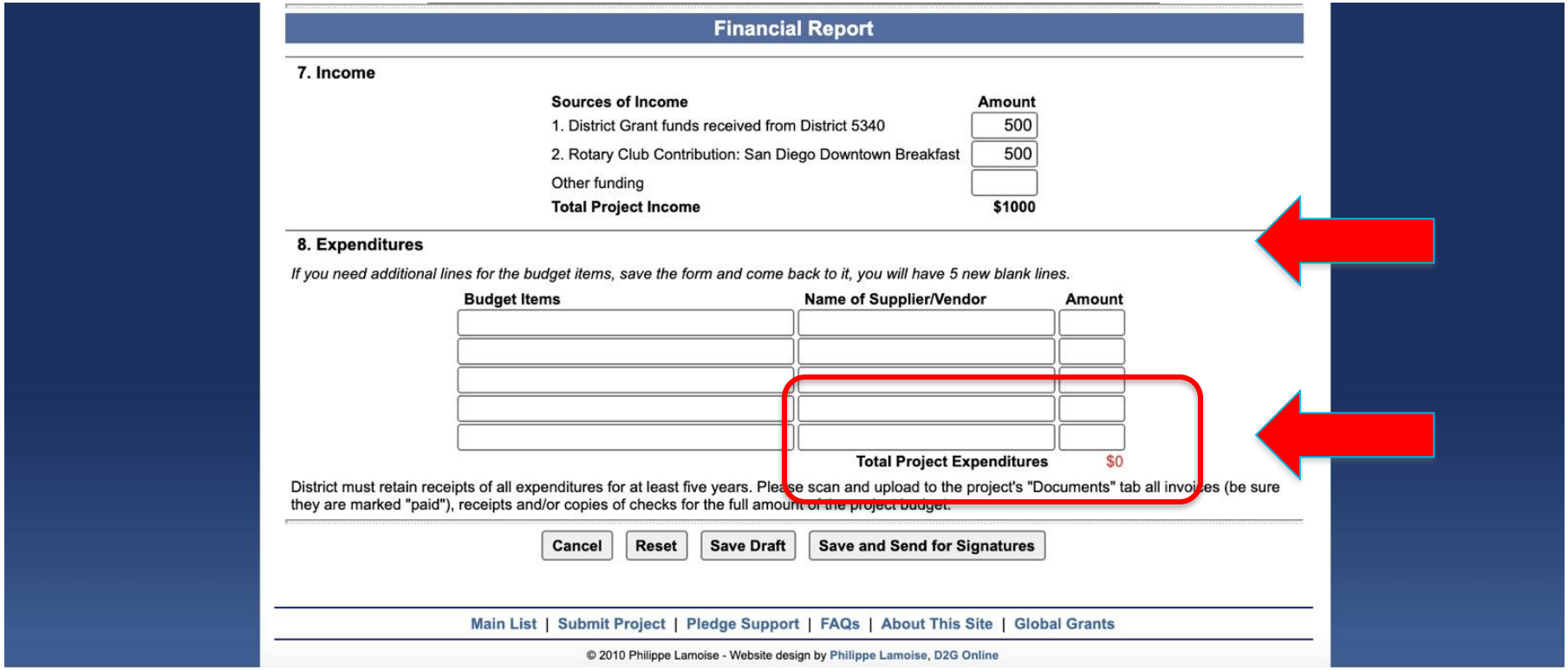
Final Report questions 7 - 8



Financial Report

7. Income

Sources of Income	Amount
1. District Grant funds received from District 5340	500
2. Rotary Club Contribution: San Diego Downtown Breakfast	500
Other funding	
Total Project Income	**$1000**

8. Expenditures

If you need additional lines for the budget items, save the form and come back to it, you will have 5 new blank lines.

Budget Items	Name of Supplier/Vendor	Amount

Total Project Expenditures $0

District must retain receipts of all expenditures for at least five years. Please scan and upload to the project's "Documents" tab all invoices (be sure they are marked "paid"), receipts and/or copies of checks for the full amount of the project budget.

Cancel | Reset | Save Draft | Save and Send for Signatures

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

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District Grant is finished and complete. What is next?

- Balance your expenses with the combined grant funds revenue
- The DDF portion of any unspent funds must be returned to Rotary District 5340. (If a 1:1 match was paid, then 50% of unspent funds are returned)
- Make notes in History Log
- Mail check to Rotary District 5340, Attn: District Foundation Committee, and put the grant number on the memo line

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Link to online quiz.

DISTRICT GRANTS

GRANTS

Guide to Grants

Global Grants

Grant Policies District 5340 - 2022-2023

Global Grants

Global Grants Training Seminar

Global Grants Seminar 2021 (PDF)

Global Grant Quiz

Club Memorandum of Understanding (PDF)

Club Memorandum of Understanding Worksheet (PDF)

MatchingGrants.org - Global Grants

Rotary Grant Center

District Grants

Grant Policies District 5340 - 2022-2023

District Grants

District Grant Seminar 2021 (PPT)

District Grant Quiz

DDF Bank Deposit Form (PDF)

Guide to Setting Rotary Foundation Giving Goals (PDF)

MatchingGrants.org - District Grants

District Grants are short-term projects that are carried out by one sponsor club. Compared to Global Grants, District Grants tend to be smaller in size and scope. While Global Grants are usually international in nature, District Grants may be either local or international. They have the flexibility to be done in the sponsor club's community, in another district, or in another country. District Grants must be completed within the Rotary year.

District Grants are administered by District 5340, and the terms and conditions of these grants change from year to year. During 2021-22, club money can be matched up to $3000 with District Designated Funds (DDF). **To be eligible for District Grant DDF, the Rotary club requesting the DDF allocation must have contributed either a minimum of $50 per capita to the Annual Fund or a total of $5,000 to the Annual Fund of The Rotary Foundation for the 2020-21 Rotary year.** As with Global Grants, clubs may partner and pool their DDF to create larger projects.

Clubs interested in participating in District Grants every year must have two (2) club members attend the District Grants Training Seminar (DGTS). For the 2021-22 funding year, due to the COVID-19 pandemic, the training has gone virtual. **The District Grants Training Seminar will be held via Zoom on April 10, 2021.** A recording of the event will be available on this website after that date. **Two club members must watch the PowerPoint: District Grant Seminar 2021 (PPT) and complete the quiz with a passing score by June 1, 2021, in order for a club to be qualified for a District Grant.** You must retake the test until you receive a passing score (70%). Your passing score will be automatically reported to the District Foundation Committee.

For the 2021-22 Rotary year, clubs requesting funding for District Grants will also need to have their Foundation Goals entered in Rotary.org by August 1, 2021. Step-by-step instructions can be accessed at this Guide to Setting Rotary Foundation Giving Goals.

All District Grants are administered at MatchingGrants.org, a website created by Rotary District 5340 that helps Rotary districts across the world administer grants. Details on District Grants to be considered are entered into this system. As part of the application process, clubs must complete a District Grants DDF Bank Deposit Form in order to receive funding for their project. Once approved, clubs receive DDF via electronic funds transfer.

To view lists of past, current, and potential projects, be sure to visit http://www.matchinggrants.org/district.

Like 12

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Calls to Action

- Pass the District Grants Quiz
  - At least two members of your Club
- Submit Final Reports for 2024-25
  - Final Reports plus Receipts
- Ensure $50+ giving per capita to TRF Annual Fund, in 2024-2025
- Enter Rotary Giving Goals for 2025-26
  - Entered by your President

Additional information

- https://www.rotary5340.org/sitepage/grants/district-grants

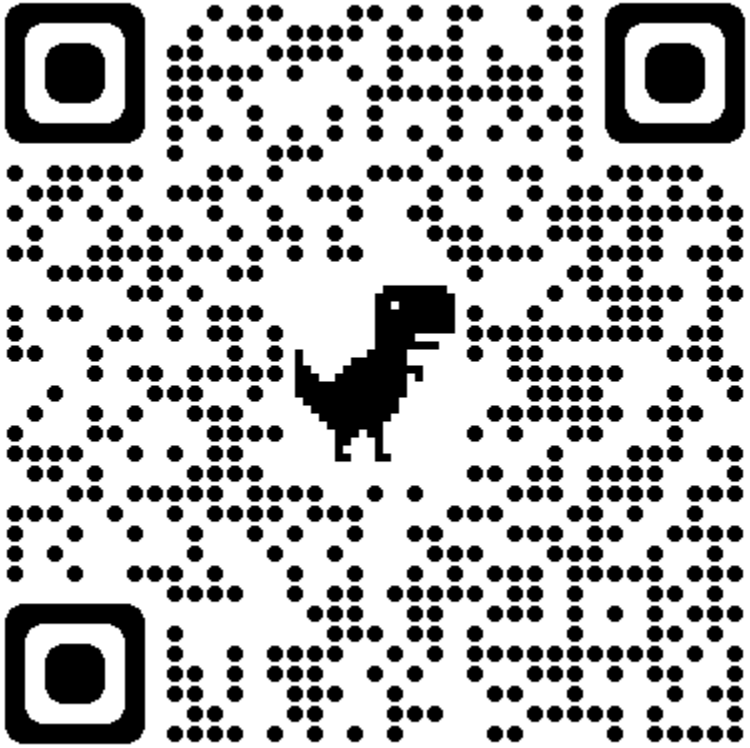
- District Grants Chair:

  Alan Turner

  alanturner.rotary@gmail.com

  (619) 318-9222

District Grants - Online Quiz



Please keep the Certificate

District Grants - Training

March 29, 2025

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