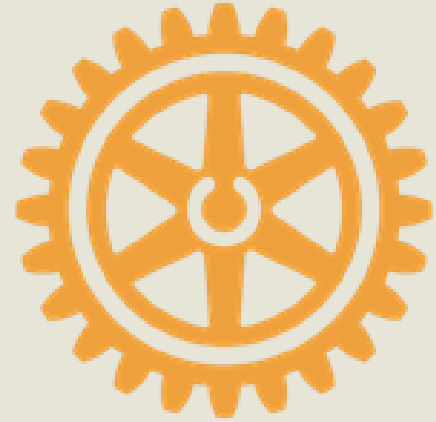


Rotary

District 5340



District Training Assembly

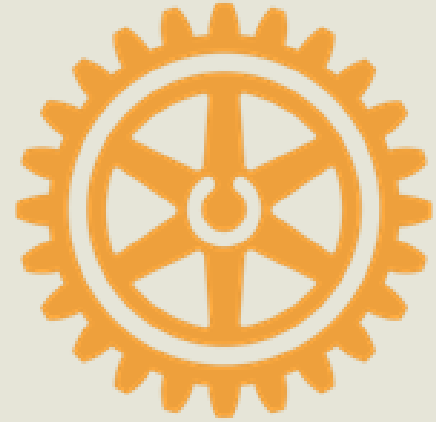
March 9, 2024

Dianne Crawford, District Governor-Elect Rotary District 5340



Rotary

District 5340



District Grants - Training

March 9, 2024

Alan Turner

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 **\$3,200**
 - Your club may submit multiple grant requests, combined limit of \$3,200 DDF
 - Your club can combine with other clubs
- All applications and reporting done online on matchinggrants.org

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 2023-2024 we received \$145,824 designated for District Grants
 - We funded 94+ projects

Examples of District Grants



Policies - Eligibility

Is your Club eligible to apply for District Grants?

Selected Policies for 2024–2025 District Grants

- District Grant Applications must be submitted on www.matchinggrants.org/district on or before **August 1, 2024**.
- **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 2023-2024 Rotary year.

Selected Policies for 2024-2025 District Grants (continued)


- Rotary Foundation Giving goals for 2023-2024 must be entered on Rotary Club Central website:
<https://rcc.rotary.org/#/goals>
 - This is usually entered by the Club President
- Grants will be awarded at the first District Rotary Foundation Committee meeting held after August 1, 2024.
- 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

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



Submit a new project on Matchinggrants.org



[Home](#) | [Submit Project](#) | [Pledge Support](#) | [Help](#) | [About This Site](#) | [Global Grants](#)

Submit a New Project

Project Title Rotary Year

Country Location

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

<input type="checkbox"/> Peacebuilding and conflict prevention	<input type="checkbox"/> Disease prevention and treatment
<input type="checkbox"/> Water, sanitation and hygiene	<input type="checkbox"/> Maternal and child health
<input type="checkbox"/> Basic education and literacy	<input type="checkbox"/> Community economic development
<input type="checkbox"/> The environment	

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.

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.

Select the Rotary Year for the project and Activity Type



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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

Country

Rotary Year

2023-24 ▼

Location

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

☐ Peacebuilding and conflict prevention

☐ Disease prevention and treatment

☐ Water, sanitation and hygiene

☐ Maternal and child health

☐ Basic education and literacy

☐ Community economic development

☐ The environment

Activity Type

Select an Activity ▼

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.

Project Summary and Project Description

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.

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

[Main List](#) | [Submit Project](#) | [Pledge Support](#) | [FAQs](#) | [About This Site](#) | [Global Grants](#)



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

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 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.

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.

[Main List](#) | [Submit Project](#) | [Pledge Support](#) | [FAQs](#) | [About This Site](#) | [Global Grants](#)



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 as well as District Contribution (DDF) up to \$3,200.

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, or at <https://rotary5340.org/documents/en-us/ec72c9fb-4250-4ed5-86e4-f015ad92a537/1/>
- Upload deposit information form as a “restricted access” document. One form for each grant.

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

Loading Restricted PDF Documents

Rotary District Grants


matchinggrants.org/district/admin.cgi?project=1502

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

P-1502 Bikes for Kids Back to Project

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:

☐ **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

Select a Document

Signature Process

The screenshot shows a web browser window with the URL `matchinggrants.org/district/signature.html`. The page features the Rotary International logo and a banner with the text "Developed by District 5340 for use by the entire Rotary world". Navigation links include "My Account", "Search", "Contact Us", "Main List", "Submit Project", "Pledge Support", "Help", "About This Site", "Global Grants", "How Does it Work?", "FAQs", "QuickTips", and "Signature Process". A red arrow points to the "Signature Process" link. Below the navigation bar, the "Signature Process" section is titled, followed by a paragraph explaining the process: "The signature process applies to the Districts that have elected to use the Rotary Grants Website to get their clubs to apply for DDF matching funds. After a project is Fully Pledged it needs to be electronically signed to be submitted for DDF approval by your District Leadership. This signature process is done at the **Club level**, not the district. After a project is signed it can be reviewed and approved by the District Leadership." A sub-section titled "Starting the Process" provides instructions: "To start the signature process go to your project administration page and click on the 'Start Club Signature Process' button. On the next page you need to select the **Club Signatories**. Check with your District Leadership to see who you should". A "Project Status Information" box contains text about the "Fully Pledged" status and a "Start Club Signature Process" button. The browser's address bar and status bar are visible at the top and bottom of the window.

Rotary District Grants

matchinggrants.org/district/signature.html

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My Account | Search | Contact Us

Rotary District Grants

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

How Does it Work? | FAQs | QuickTips | **Signature Process**

Signature Process

The signature process applies to the Districts that have elected to use the Rotary Grants Website to get their clubs to apply for DDF matching funds. After a project is Fully Pledged it needs to be electronically signed to be submitted for DDF approval by your District Leadership. This signature process is done at the **Club level**, not the district. After a project is signed it can be reviewed and approved by the District Leadership.

Starting the Process

To start the signature process go to your project administration page and click on the "Start Club Signature Process" button. On the next page you need to select the **Club Signatories**. Check with your District Leadership to see who you should

Project Status Information

Your project is "**Fully Pledged**". This means the amount of the pledges is equal to the total budget of the project. Please review the project description, and the supporting documents to make sure your project is well defined. Then you can start the club signature process by clicking the button below. This will collect digital signatures from the club for submission to the district leadership. You will not be able to make changes to the project description and financing after starting this process.

Click the button on the right when you are ready to start the club signature

Start Club Signature Process

Club Signatures
– Primary Contact, President, Treasurer

Do NOT add District names

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, 2024**

Help on matchinggrants.org website

The screenshot shows a web browser window with the URL matchinggrants.org/district/faq.html. The page features a blue header with the Rotary logo on the left and the text "Developed by District 5340 for use by the entire Rotary world" in the center. On the right, there are links for "My Account" and "Sign Out". Below the header is a row of four images: a water project sign, a group of people holding a large check, a person at a desk, and a group of people working outdoors. A large red arrow points down from the second image to the "Help" link in the navigation bar. The navigation bar is yellow and contains the following links: "Main List", "Submit Project", "Pledge Support", "Help", "About This Site", and "Global Grants". Below this is a blue bar with the text "How Does it Work?", "FAQs", "QuickTips", and "Signature Process". A red arrow points from the left to the "How Does it Work?" link. The page also has a section titled "Frequently Asked Questions" with the following text: "How can I create an account on this website?", "If I submit a project, will I be guaranteed funding?", and "How long will my project be listed?". The Windows taskbar at the bottom shows the time as 2:27 PM on 3/11/2017.

Rotary District Grants

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My Account | Sign Out

Water Projects

Rotary District Grants

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

How Does it Work? | FAQs | QuickTips | Signature Process

Frequently Asked Questions

How can I create an account on this website?
If I submit a project, will I be guaranteed funding?
How long will my project be listed?

Frequently Asked Questions

[How Does it Work?](#) | [FAQs](#) | [QuickTips](#) | [Signature Process](#)

Frequently Asked Questions

- >>> How can I create an account on this website?
- >>> If I submit a project, will I be guaranteed funding?
- >>> How long will my project be listed?
- >>> Are all Clubs eligible to participate to a District Grant?
- >>> Are all Projects eligible for a District Grant?
- >>> How can I update my project after I submitted it?
- >>> Can I withdraw or change my pledge for a project?
- >>> Who will do the paperwork for the project?
- >>> Is this website only for Clubs in District 5340?
- >>> What is the deadline to submit a District Grant?
- >>> Should this website be translated in Spanish or other language?

>>> How can I create an account on this website?

An account will be created automatically the first time you submit a project, or pledge support to a project, or when someone grants you access to a project, or when you are granted a role in your district. You do not need an account to search the projects on the website. The account is only needed to administer the projects you participate in, and gives you easy access to your list of projects.

>>> If I submit a project, will I be guaranteed funding?

No. The website is only used to display some information about your project. You have to promote your project, and you can make reference to the web page address to give some information about your project. Somebody might look at the website and pledge support for your project, but there is no guarantee this will happen. Furthermore the approval of District Designated Funds (DDF) match is specific to your district. You need to check with them to get DDF approval.

>>> How long will my project be listed?

Your project will be listed for the current Rotary year. If it is not fully funded by June 1 of the current Rotary year, you will receive a notification by email asking if you wish to carry-over your project to the following year. If you choose to do so, your project will be listed one more year. If not, your project will be dropped from the list on September 1. Completed projects stay listed on the website for archive.

>>> Are all Clubs eligible to participate to a District Grant?

Most certainly, as long as they follow The Rotary Foundation guidelines. However the approval of District Designated Funds (DDF) match is specific to your district. You need to check with them to get DDF approval.

>>> Are all Projects eligible for a District Grant?

No. Although the rules are more relaxed on District Grants, there are some specific guidelines by the Rotary Foundation, and your District might even have some additional rules. This is to ensure that the money will be used properly and efficiently. Check with your District leadership if you have any questions.

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
- **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

[Main List](#) | [Submit Project](#) | [Pledge Support](#) | [Help](#) | [About This Site](#) | [Global Grants](#)

P-4441

3rd Grade Dictionary Project

[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:

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: alanturner.rotary@gmail.com

Cc: janice@janicekurth.com, marta_knight@yahoo.com,
fourglovs@gmail.com

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

[Save History Log/Send Email](#)



Loading Photos

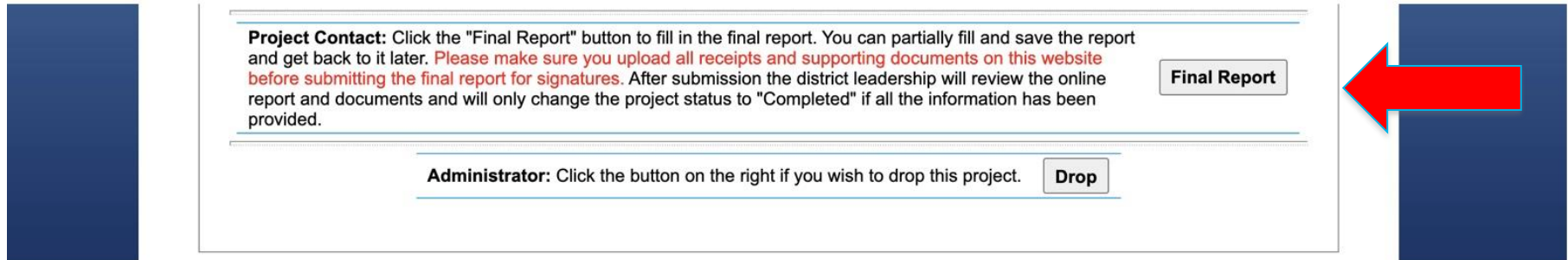
The screenshot shows the Rotary District Grants website interface. At the top, there is a header with the Rotary International logo, a navigation bar with links like 'My Account', 'Search', and 'Contact Us', and a banner for 'Rotary District Grants'. Below the banner, a navigation bar contains links: 'Main List', 'Submit Project', 'Pledge Support', 'Help', 'About This', and 'Global Grants'. A red arrow points from the 'Global Grants' link to the 'Photos' tab in the project details section.

The project details section for 'P-1490 Annual Bike Drive' includes tabs for 'Description', 'Financing', 'Documents', 'Photos', and 'History Logs'. The 'Photos' tab is active, showing an 'Upload Project Photos' section. A red arrow points to the 'Choose File' button. The upload area includes a text prompt: 'Select the Picture to upload and click "Upload".', a 'Choose File' button, a 'No file chosen' status, an 'Upload' button, and a 'Caption:' text input field.

At the bottom of the page, a footer indicates the user is logged in as 'Marta Knight, marta_knight@yahoo.com' with a 'Logout' link. The footer also contains a navigation bar with links: 'Main List', 'Submit Project', 'Pledge Support', 'FAQs', 'About This Site', and 'Global Grants'. The copyright notice at the bottom reads: '© 2010 Philippe Lamoise - Website design by Philippe Lamoise, D2G Online'.

Photos are Important

Description Page, Submitting the Final Report



Project Contact: Click the "Final Report" button to fill in the final report. You can partially fill and save the report and get back to it later. **Please make sure you upload all receipts and supporting documents on this website before submitting the final report for signatures.** After submission the district leadership will review the online report and documents and will only change the project status to "Completed" if all the information has been provided.

Final Report

Administrator: Click the button on the right if you wish to drop this project.

Drop

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?

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.

CancelResetSave DraftSave 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

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

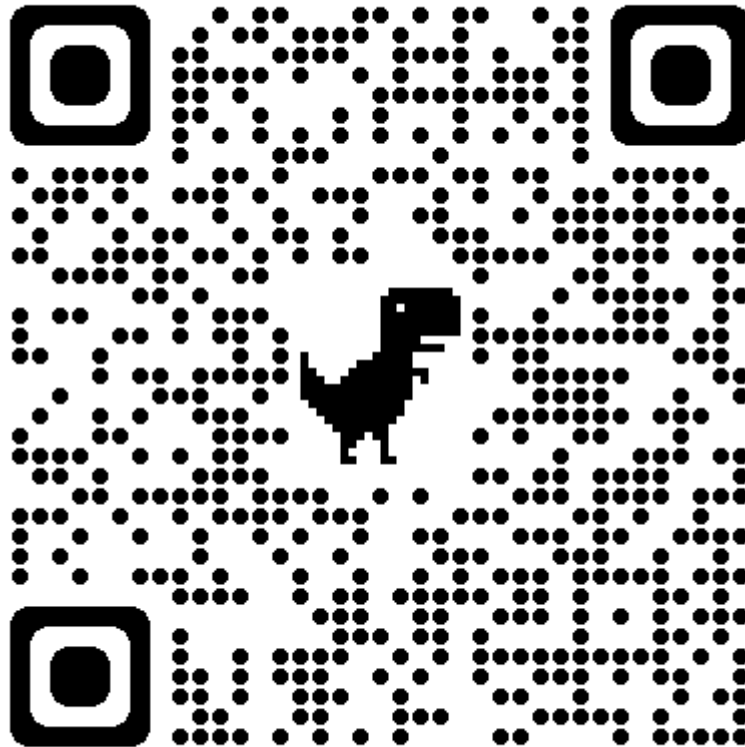


- Pass the District Grants Quiz
 - At least two members of your Club
- Submit Final Reports for 2023-24
 - Final Reports plus Receipts
- Ensure \$50+ giving per capita to TRF Annual Fund, in 2023-2024
- Enter Rotary Giving Goals for 2024-25
 - Entered by your President

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 9, 2024

Alan Turner