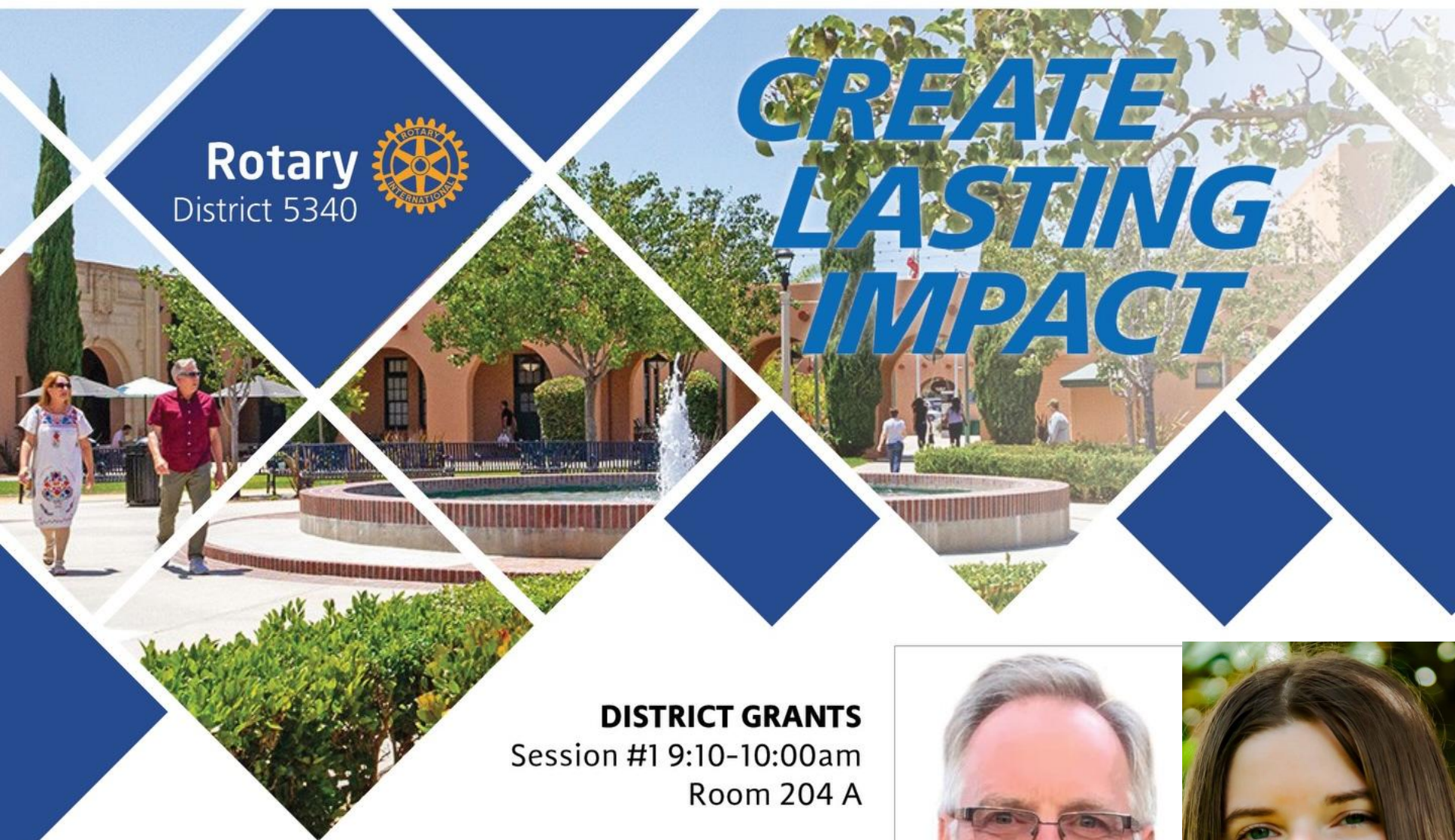


Rotary
District 5340



**CREATE
LASTING
IMPACT**



DISTRICT GRANTS

Session #1 9:10-10:00am
Room 204 A

Session #2 10:10-11:00am
Main Hall

Alan Turner, Rancho Bernardo RC
Caitlin Chavez, El Centro RC



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](https://www.matchinggrants.org)



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

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 2025-2026 we received \$135,417 designated for District Grants
 - We funded 104 projects

Examples of District Grants



Policies - Eligibility

Is your Club eligible to apply for District Grants?

Selected Policies for 2025–2026 District Grants

- District Grant Applications must be submitted on www.matchinggrants.org/district on or before **August 1, 2026**.
- **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 2025-2026 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, 2026
- ❖ 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, 2026.
- 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, 2027**, 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

The screenshot shows the homepage of the Rotary Grants Website. At the top left is the Rotary International logo. To its right is a yellow banner with the text "Developed by District 5340 for use by the entire Rotary world". Below this is a row of four images: a Rotary project sign, a group of people holding a check, a woman at a desk, and a group of people working on a project. The text "Rotary Grants Website" is overlaid on the right side of these images. Below the images is a yellow navigation bar with links: "Global Grants | District Grants | Legacy Matching Grants | Help | About This Site | Contact Us". A blue banner below the navigation bar says "Welcome to the Rotary Grants Website!". Underneath is a yellow box with the text "Select one of the Website Sections". Three large, semi-transparent arrows point from this text to three interactive buttons: "Global Grants" (with a globe icon), "District Grants" (with a house icon), and "Legacy Matching Grants" (with a framed sign icon). Each button has a red "Enter" button and a hand cursor icon. A large red arrow points from the right towards the "District Grants" button.

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)

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

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

Developed by District 5340
for use by the entire Rotary world

My Account | Search | Contact Us



Rotary
District Grants Website

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

Cancel Reset Save

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 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 Summary and Project Description

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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."

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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
 - 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

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.

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, 2026**

What Next?

District Grant is approved, what happens next ?

- In about 4 to 5 weeks The Rotary Foundation approves the District 5340 District Grant application (encompassing all District Grants)
- You will receive an approval notification, via email from matchinggrants.org
- 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

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

[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



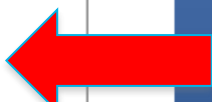
History Log / Email Communication

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](#)



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](#)

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	<input type="text" value="500"/>
2. Rotary Club Contribution: San Diego Downtown Breakfast	<input type="text" value="500"/>
Other funding	<input type="text"/>
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
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
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.

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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 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

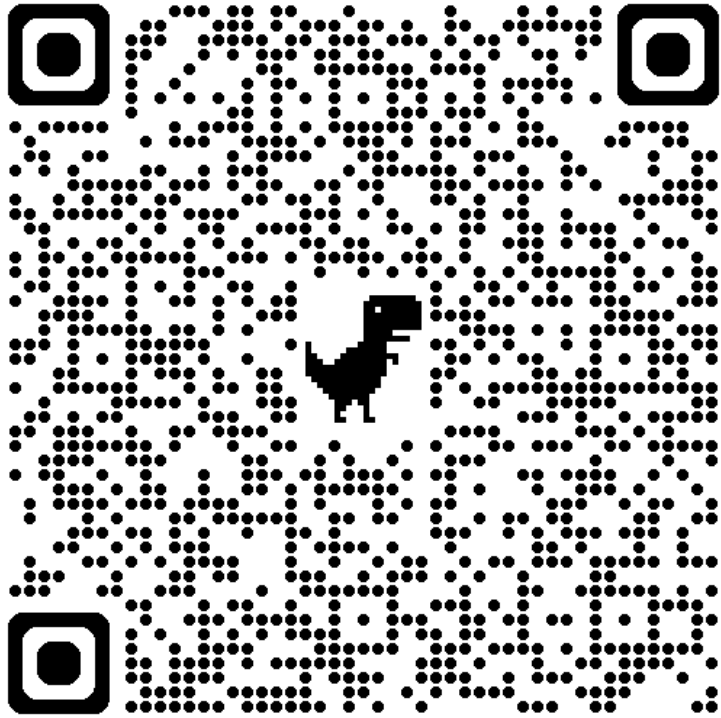
Before You Apply

- Make sure your club is qualified!
- Your club must have met the \$50 per capita to the Annual Fund before June 31st, 2026
- Giving Goals entered on MyRotary.org by Aug 1, by your Club President
- Clubs need TWO members to complete training and pass the District Grants quiz
- Complete reporting of 25-26 projects.

Additional information

- <https://www.rotary5340.org/sitepage/grants/district-grants>
- District Grants Chair:
Alan Turner
alanturner.rotary@gmail.com
(619) 318-9222
- Or Caitlin Chavez
info@chaveztlc.com

District Grants - Online Quiz



Your club must have met the \$50 per capita to the Annual Fund before June 31st, 2026

Giving Goals entered on MyRotary.org by Aug 1, by your Club President

Clubs need TWO members to complete training and pass the District Grants quiz

Complete reporting of 25-26 projects

District Grants - Training

March 29, 2025

Alan Turner