DISTRICT GRANT MANAGEMENT SEMINAR

March 2024

The Rotary Foundation

THE MAGIC OF ROTARY

PURPOSE

- Manage a Rotary grant
- STEWARDSHIP expectations
- Implementing the MOU
- Qualify clubs to receive grant funds

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2023-2024 PROJECTS

- 44 projects with 33 participating clubs
- Over $80k in DDF; Almost $180k total project funding
- Wide variety with thousands of beneficiaries
- Check them out at matchinggrants.org

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2023-2024 SO MUCH SERVICE ABOVE SELF!

Backpacks & school supplies for students

Josh the Otter drowning prevention

Agents of Influence media literacy game

Shoe drives

Thanksgiving for veterans

First aid clinics & kits

RYLA

Support for physically challenged youths

Food drives & packaging

Pasta dinners

Bike safety rodeos

Books & dictionaries for students

Teacher Grants

Toy drives & Santas

Theater for autistic kids

School gardens & monarch butterfly plants

Hygiene kits, warm clothing for homeless

Boys and Girls Club projects galore!

STEM programs

Urban forest tree planting

Repair & refurbishment of Casa Romantica

Children's Outreach concert

SmileMakers for lonely seniors

Homeless shelter transition to apartments

Mutt run for Animal Care Services

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LA HABRA: Sweet Cases & Bicycles

- >100 foster kids
- Bike assembly
- Duffle bags (blanket, teddy bear, toiletries, coloring books/ crayons)
- In partnership with
  - Together We Rise
  - Boys and Girls Club
  - Lions Club

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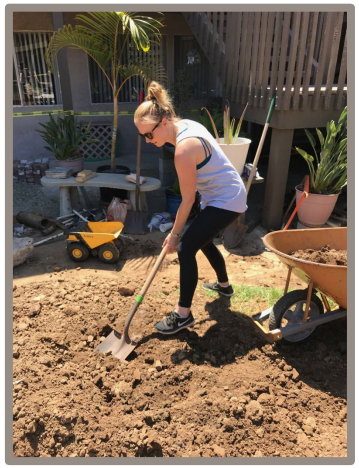
BREA: Breal Senior Apartments Upgrade



- Built by club in 1980
- 30 low-income seniors
- Many upgrades including
  - Patio cover & fountain
  - Garden
  - Irrigation system
  - Apartment refurbishment
- Special visits

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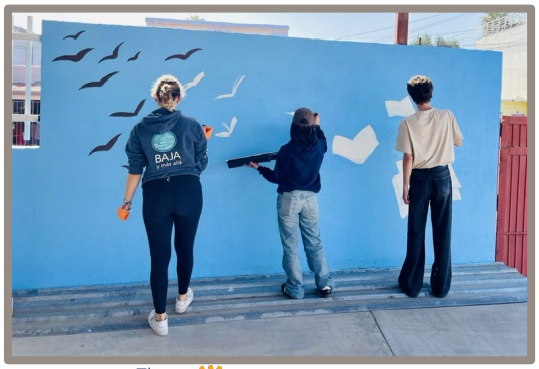
SAN JUAN CAPISTRANO/ IRVINE: Dental and Eye Clinics in Ensenada



- Signature project for many years
- Thousands (kids, $ of dental & eye care)
- Led by dentists Dr. Chuck Tozzer & Austin Wall, assisted by USC dental students
- Eye clinic led by Dr. Fred Stellhorn (Cisca's brother)
- In partnership with Ensenada Rotary Clubs
- School upgrades too

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OUR PROJECTS CAN NEVER BE TOO FAR OUT OF THE BOX !

Fire truck built (from a flat bed farm truck) by San Juan Capistrano Rotarians for Cucupah Village, Baja, Mexico

Septic tank molds (made by Dan Ouweleen's company, Pacmin) for Yorba Linda for Corazon house builds in Tecate, Mexico

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WHAT CAN WE COME UP WITH IN 2024-2025?!

With the Magic of Rotary,
the sky's the limit!

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GRANTS ARE FUNDED WITH "DDF"

- District Designated Funds
- Contributed to The Rotary Foundation Annual Fund 3 years ago
  - Current year contributions benefit the clubs in 3 years
- Invested by The Rotary Foundation
- Returned to clubs in the form of grants

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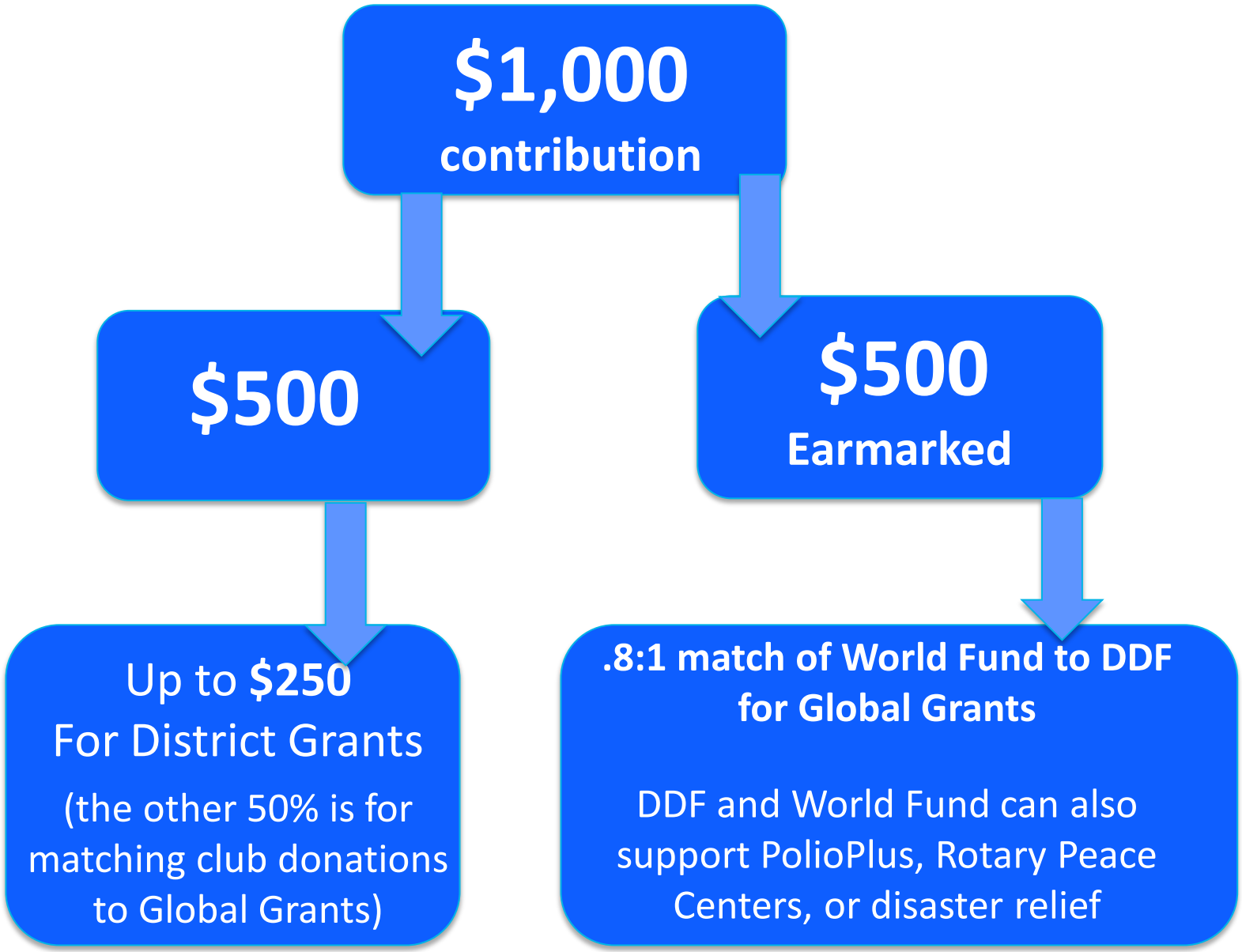

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ROTARY FOUNDATION GRANTS

- District grants
- Global grants

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OVERVIEW OF ROTARY GRANTS

- Decision-making power at the club and district levels
- Two types:
  - Global Grants
  - District Grants
- Simplified leadership structures
- Vocational training teams (Global Grant)

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APPLYING FOR A DISTRICT GRANT

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FIVE STEPS TO RECEIVING A DISTRICT MATCHING GRANT

STEP 1
- Meet four club requirements

STEP 2
- Complete a district grant application

STEP 3
- Submit your application

STEP 4
- Obtain electronic signatures

STEP 5
- DG Committee reviews and approves your application and four requirements - grant funds are issued to your club!

Rotary

Step One – Meet Club Requirements

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FOUR CLUB REQUIREMENTS

These four requirements MUST be met in order for your club to be eligible for a District Grant

- Dues to Rotary International and District 5320 are current (July dues are paid)
- Prior year district grant final report (or progress report) is filed by May 15; report with receipts have been posted to the matchinggrants.org website
- Two club members have attended the most recent Grants Management Seminar
- Your club must have signed a District or TRF Memorandum of Understanding (MOU) for local projects and a TRF MOU for projects in Mexico

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Step Two – Complete Your Grant Application

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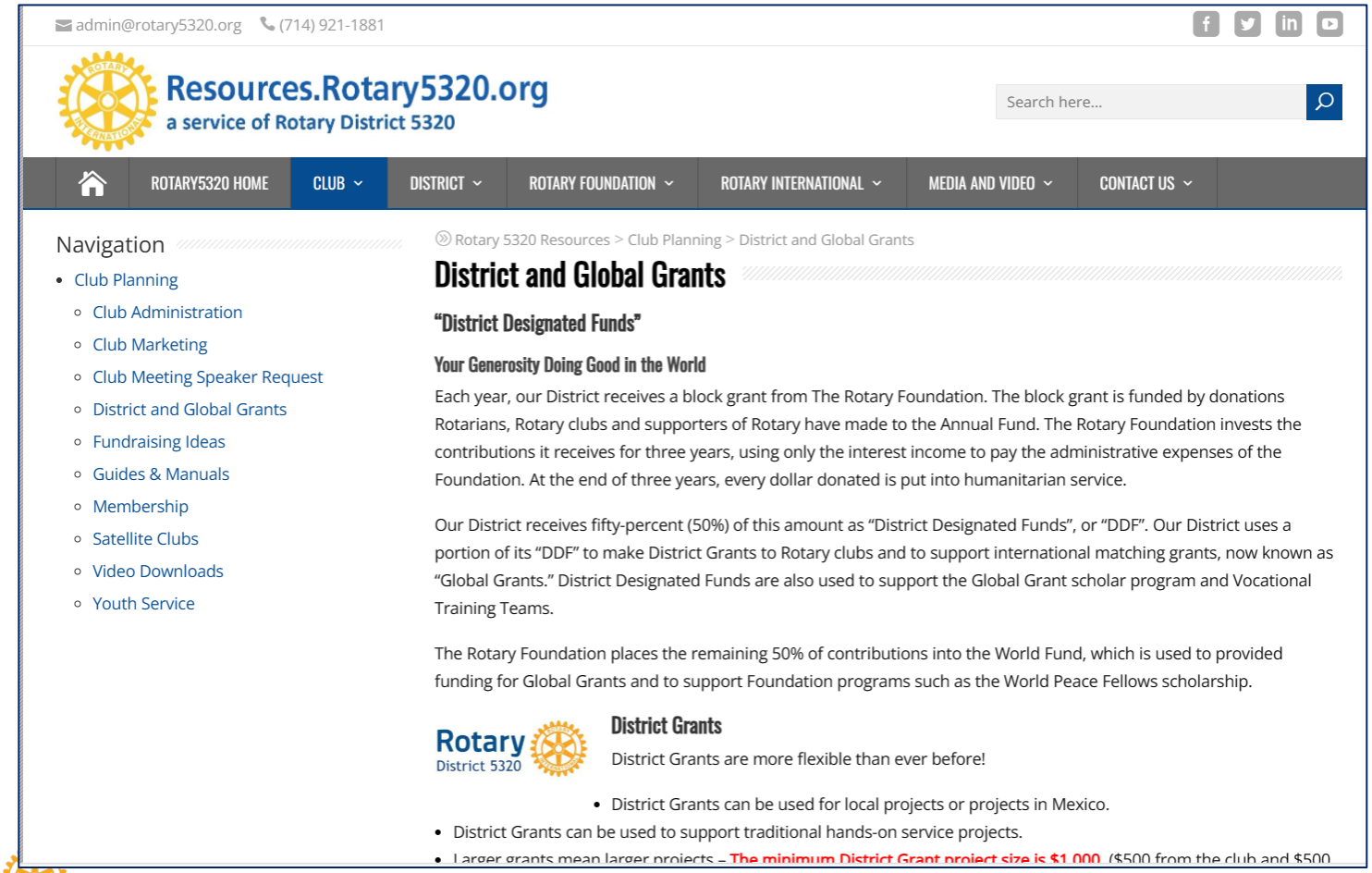
DISTRICT GRANT APPLICATION

Where can I find the form?

- Go to: https://resources.rotary5320.org/rotary-foundation/



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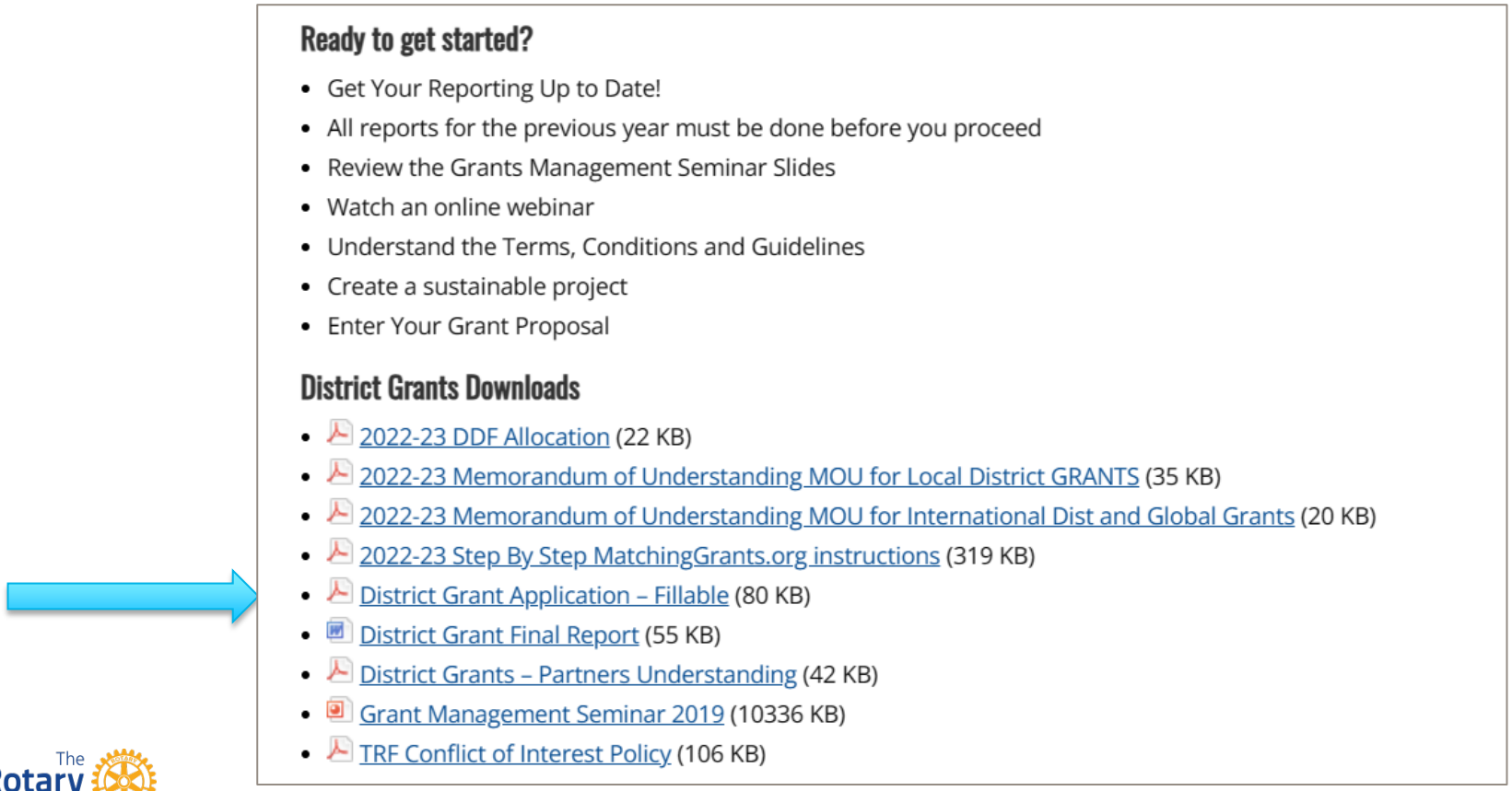
DISTRICT GRANT APPLICATION

Where can I find the form?

- Scroll down to select “District Grant Application – Fillable”
- Save the file to your computer. Open the file to fill out the application!



Ready to get started?

- Get Your Reporting Up to Date!
- All reports for the previous year must be done before you proceed
- Review the Grants Management Seminar Slides
- Watch an online webinar
- Understand the Terms, Conditions and Guidelines
- Create a sustainable project
- Enter Your Grant Proposal

District Grants Downloads

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DISTRICT GRANT APPLICATION – Page 1

Correct contact information is critical!

Rotary District 5320

District Grant Application

Rotary Club of:	**Date:**
Project Name/Title:	
Project Leader Name:	**Phone #:**
Project Leader Email:	

Be as specific as is necessary for the reviewer to understand the scope of the project

1. **Please provide a brief description of the project, and indicate the project beneficiaries (who is being served?):**

For example: "The project will provide backpacks filled with school supplies for 200 students in need, and our club will host an ice-cream social for the students and the teachers."

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DISTRICT GRANT APPLICATION – Page 1 (continued)

Project must have a start and end date

2. **Indicate the project start and end dates:** *(The project may not begin prior to the district receiving approval from TRF. Reimbursements for earlier expenses are not eligible. Projects must have an end date no later than the end of the Rotary year.)*

Project start date:	
Project end date:	

3. **Project location (select one):** ____ **Community** ____**Mexico**
(If the project is in Mexico, will there be a Rotary club from Mexico involved in the project? If so, indicate the name of the Rotary club and explain the members' involvement.)

Don't forget to complete a "Partners Understanding" form if working with another club

4. **List the project funding amounts** *(Club contribution must be equal to or greater than the amount requested from the district):*

Club contribution:	$	
District DDF (amount requested from district):	$	
Other participating clubs - list club name(s) and contribution amount(s) below:		
	$	
	$	
Grant Project - Total	$	

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DISTRICT GRANT APPLICATION – Page 2

Type "n/a" if this section does not apply to your club's project

5. **Indicate whether there is other involvement and financial support** *(If non-Rotary organizations will be involved in your club project, please describe the involvement and any financial support you are receiving for the project – for example, in-kind contributions, discounts, cash donations):*

For example: "Wells Fargo is donating $1,000 towards the purchase of backpacks."

Detail the activities of the project

6. **Describe the participation of club members** *(Your club members must be actively involved in this project. Please indicate how many members of your club will participate in this project and describe their activities):*

For example: "Approximately 20 club members will be involved in purchasing the backpacks and school supplies, filling the backpacks with the supplies, delivering/distributing the backpacks to local schools, and serving ice cream at the social."

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DISTRICT GRANT APPLICATION – Page 2 (continued)

Tip: Some clubs set up a separate account to manage district grant project funds

7. **Describe how funds will be safeguarded and tracked** *(If funds are to be distributed to a partner in Mexico, who will be responsible for the funds? How will transfers of funds to Mexico be handled?):*

For example: "The funds will be maintained in our club's checking account, and they will be tracked and disbursed by our treasurer in accordance with our club's disbursement policies."

8. **Describe how your club will use the project funds (list the types of expenses / items to be purchased):**

This replaces the previous requirement for a separate budget!

For example: "All the project funds will be used to purchase backpacks, school supplies, and ice-cream for a social with the students and teachers."

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Step Three – Submit Your Application

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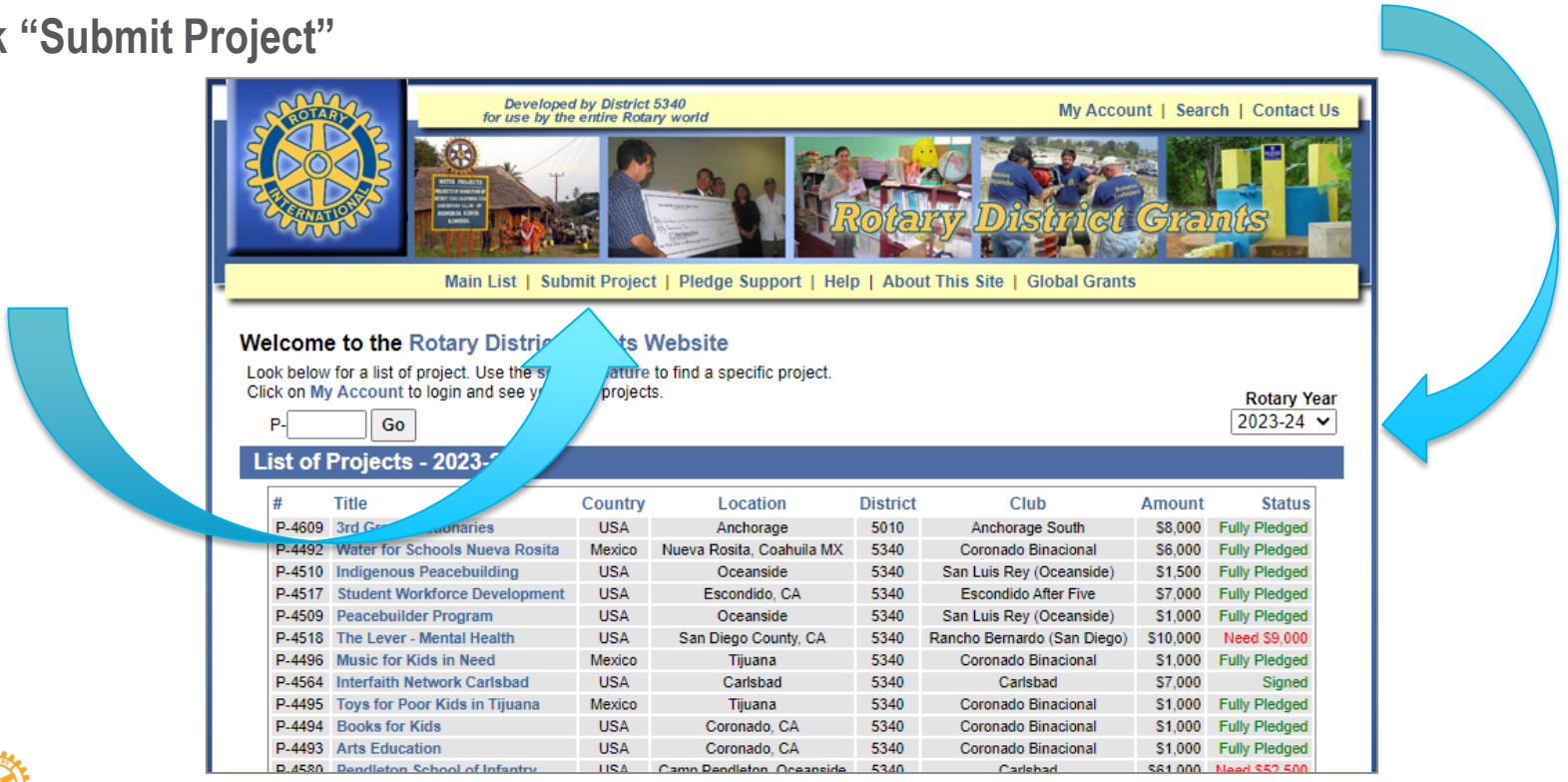
STARTING THE APPLICATION PROCESS

Where do I enter my club's district grant application?

- Go to matchinggrants.org/district
- Go to "Rotary Year" and ensure you select the correct Rotary year (2024-2025) in the dropdown menu
- Click "Submit Project"



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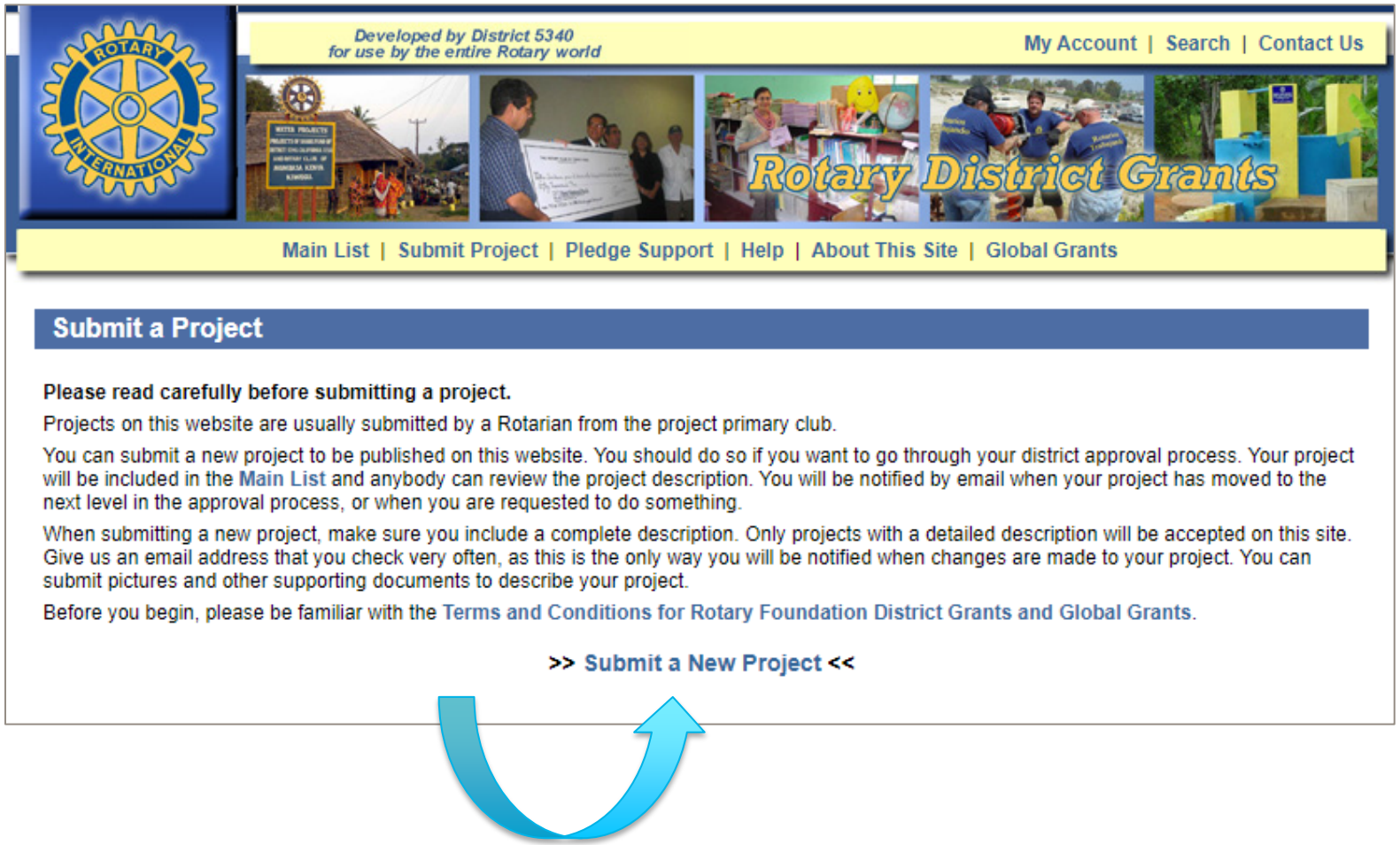
SUBMITTING A NEW PROJECT

You will see a new screen - Click “Submit a New Project”



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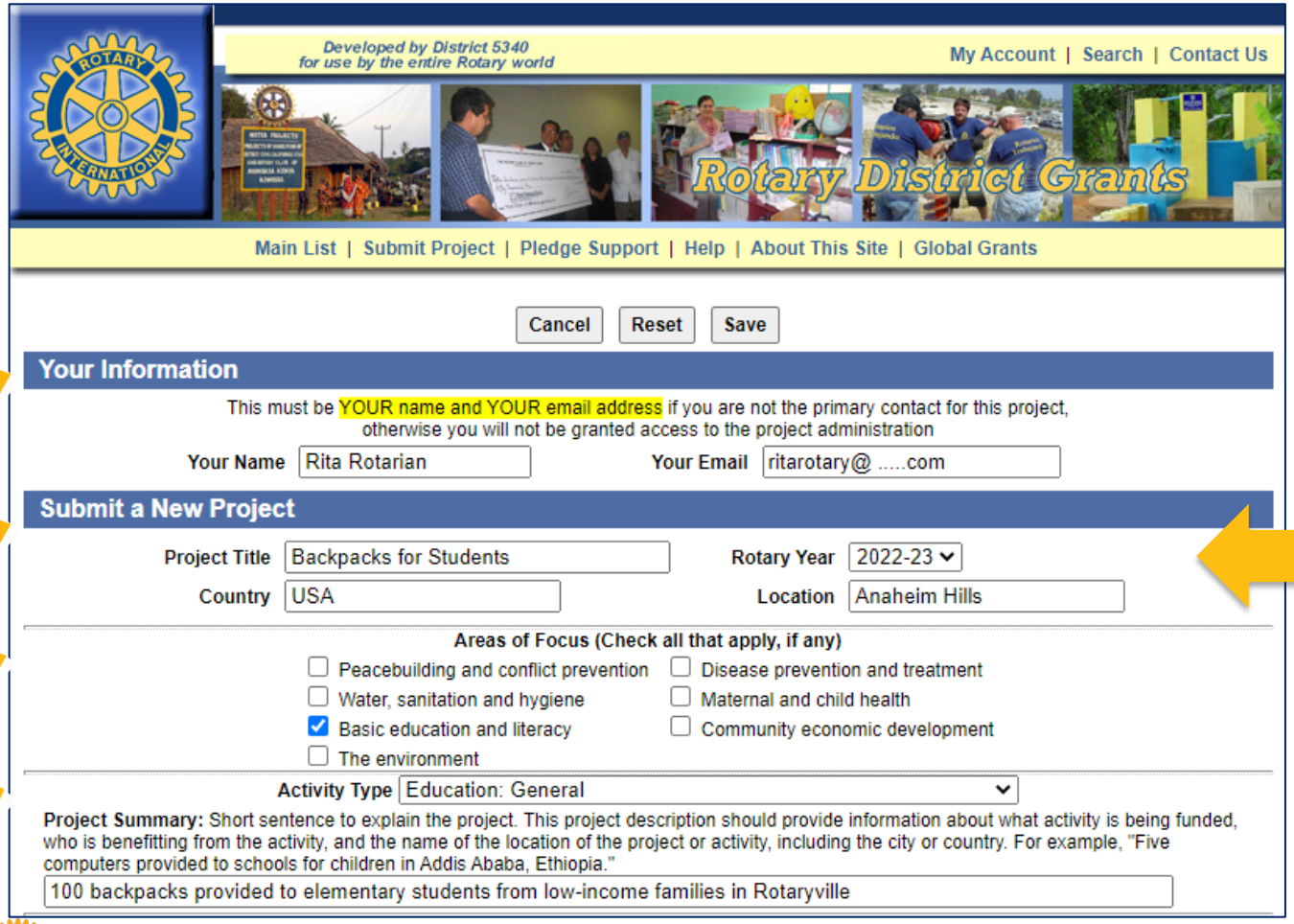
SUBMITTING A NEW PROJECT

You will see a new screen – Fill in each section requiring information



Select "2024-2025"

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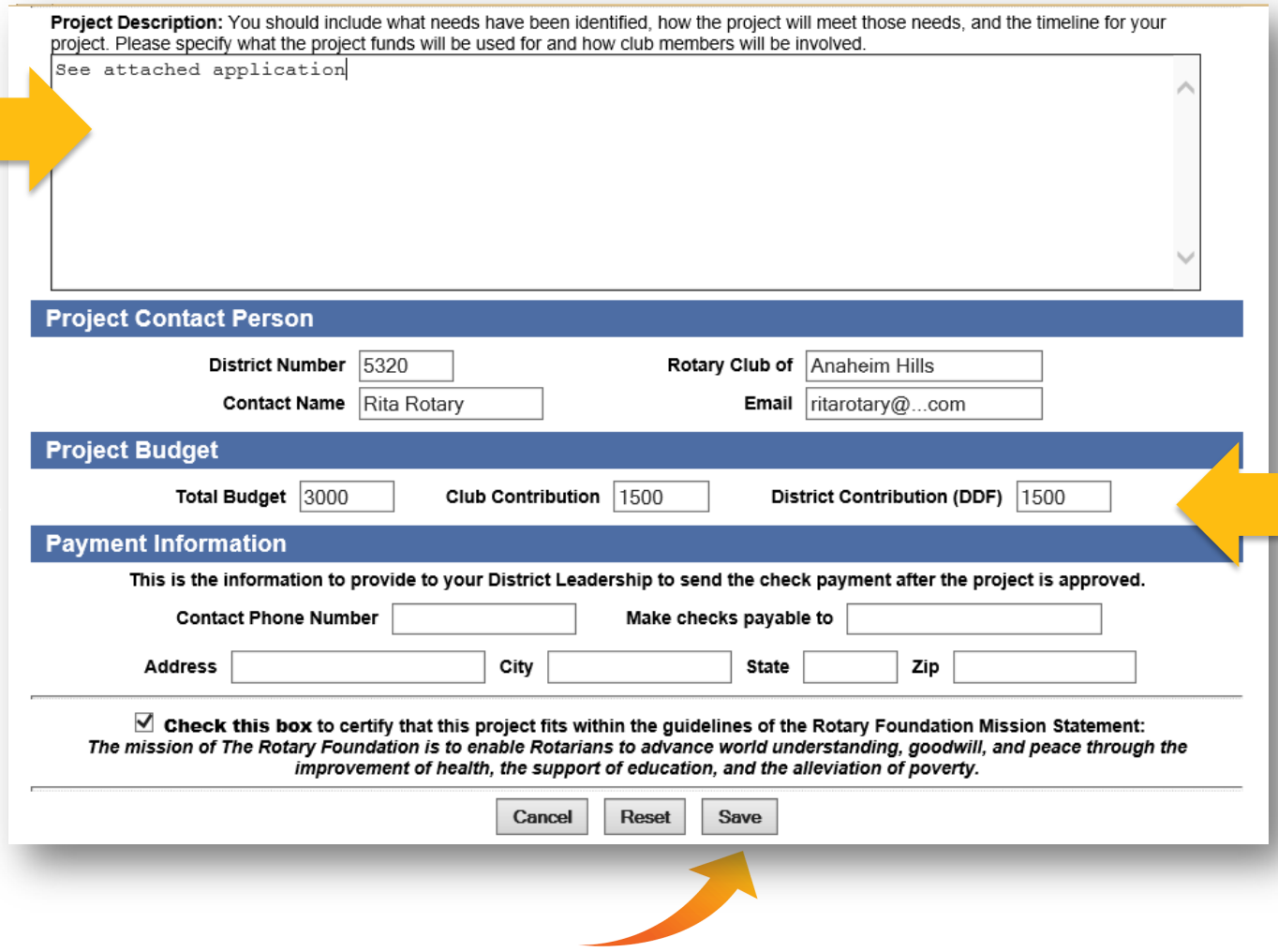
SUBMITTING A NEW PROJECT

Continue filling in information on this screen and click “save” when done

Just type “see attached application”



Amounts must match amounts in application

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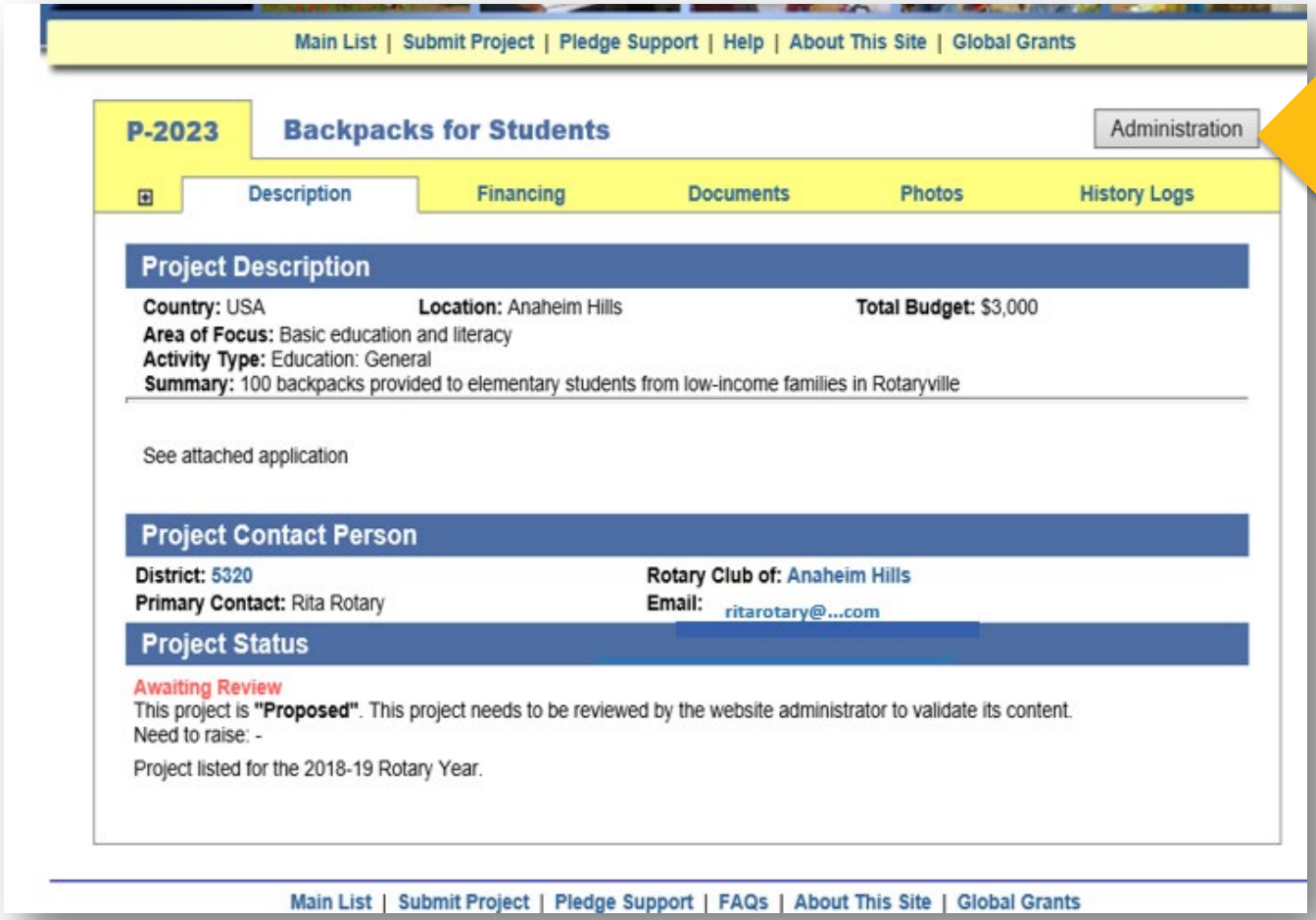
UPLOADING YOUR APPLICATION

This new screen will appear; click “administration” button



Click “administration” to continue

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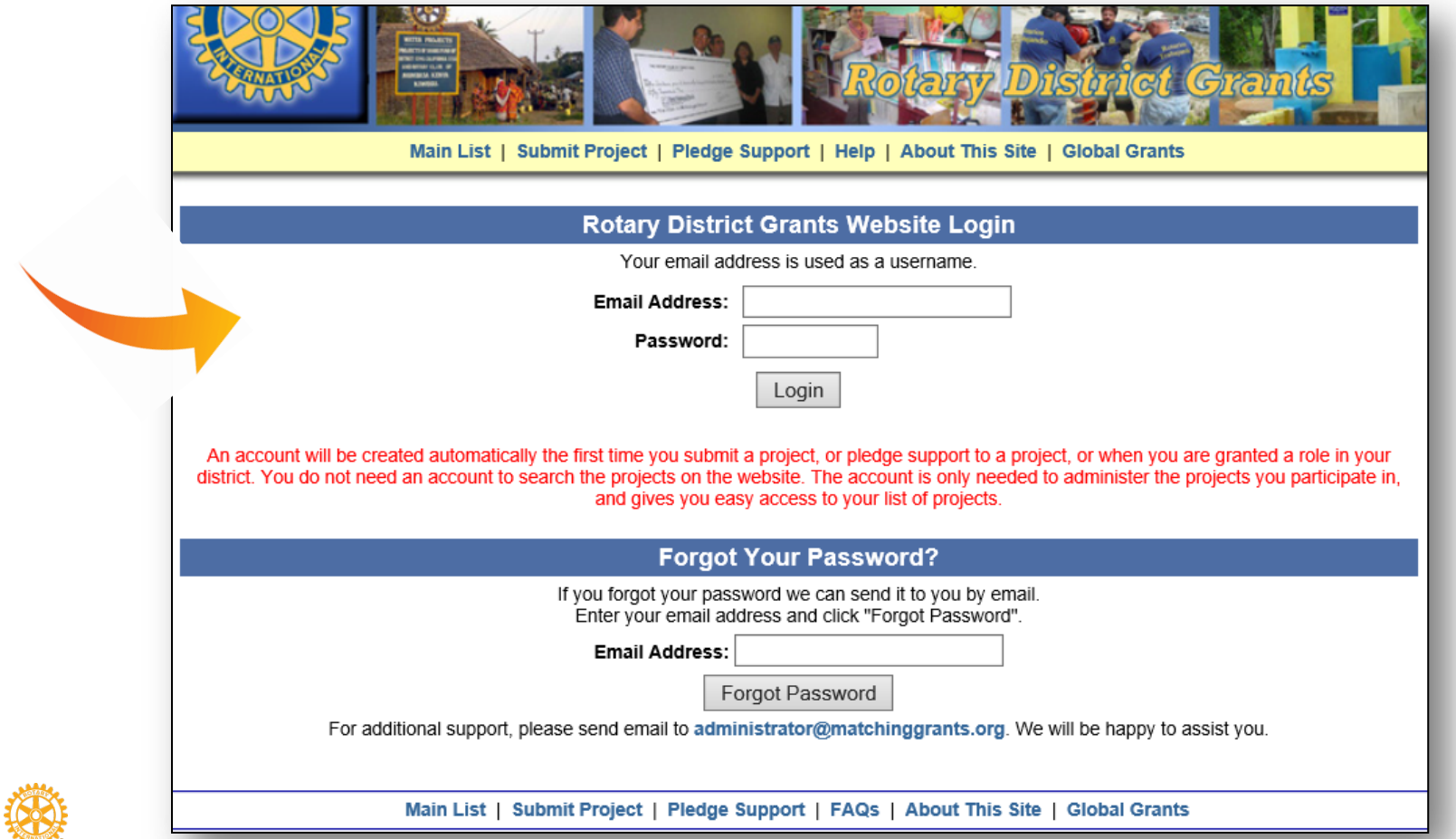
UPLOADING YOUR APPLICATION

This new screen will appear

- Enter your email address and password; if you are a new user, your password will have been sent to you via email when you started the project



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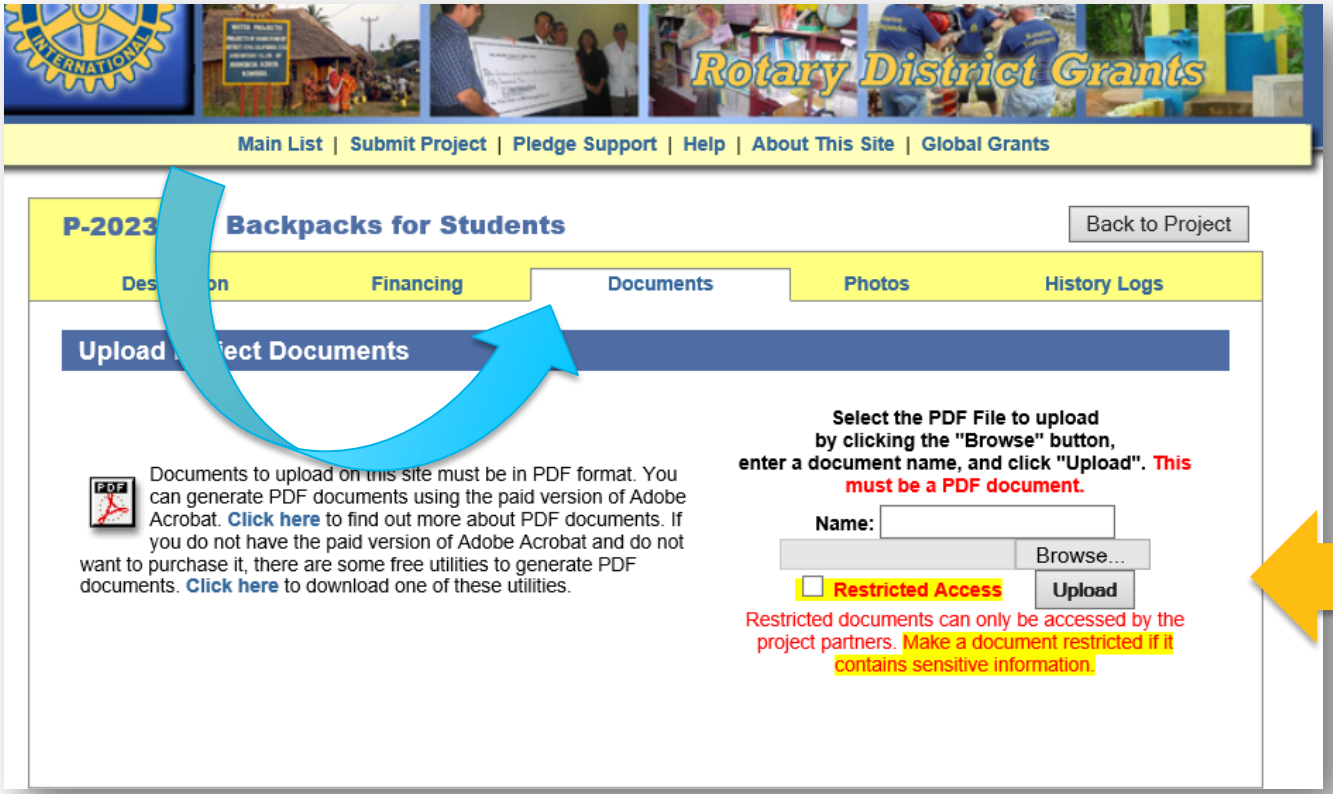
UPLOADING YOUR APPLICATION

On the page that opens, navigate to the “documents” tab to see this screen

- Type a name for your file (“Grant Application”) and upload the file from your computer



Remember! Uploads must be in pdf format

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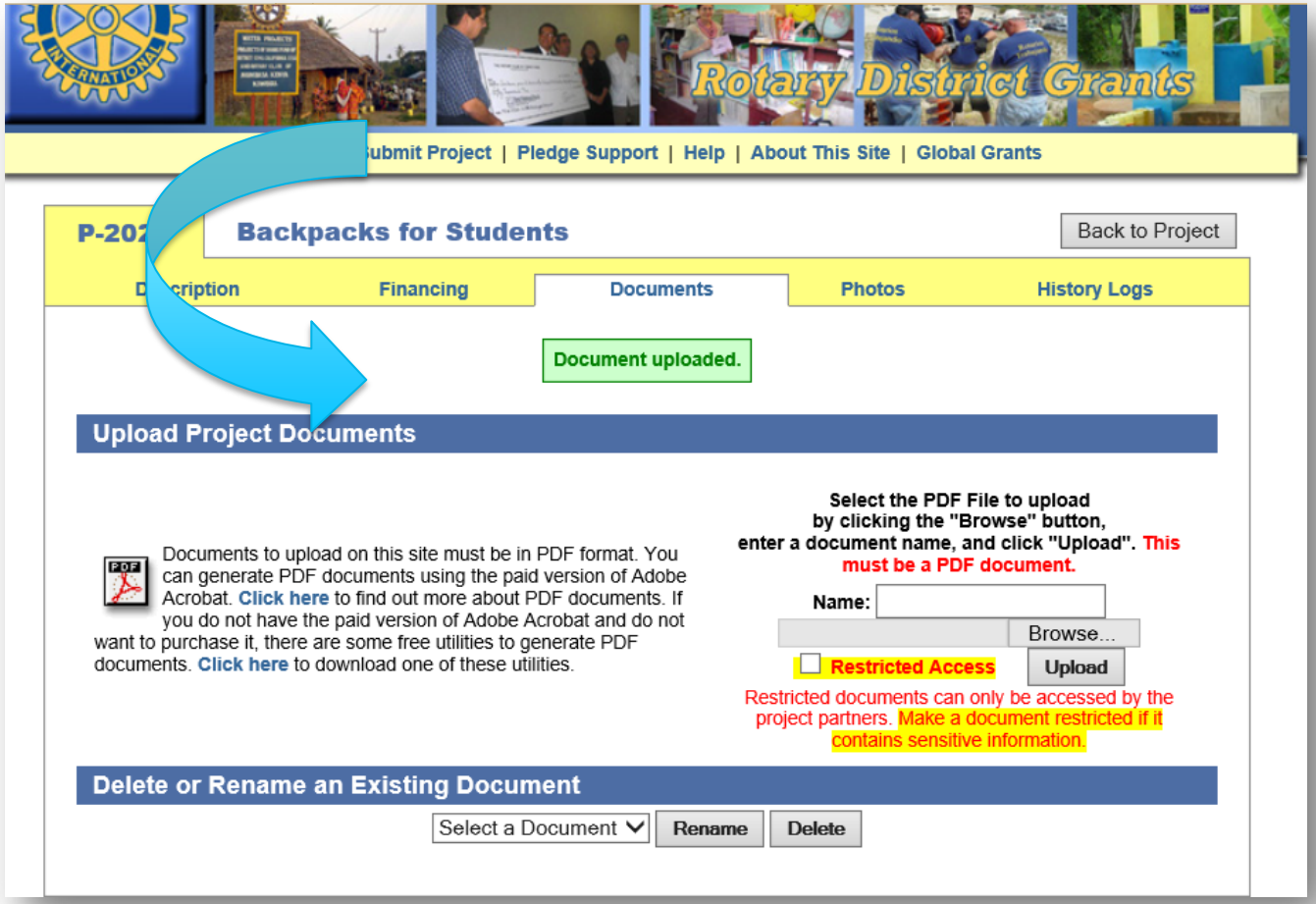
UPLOADING YOUR APPLICATION

Look for the upload confirmation

- The “Document uploaded” message will appear



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Step Four – Obtain Electronic Signatures

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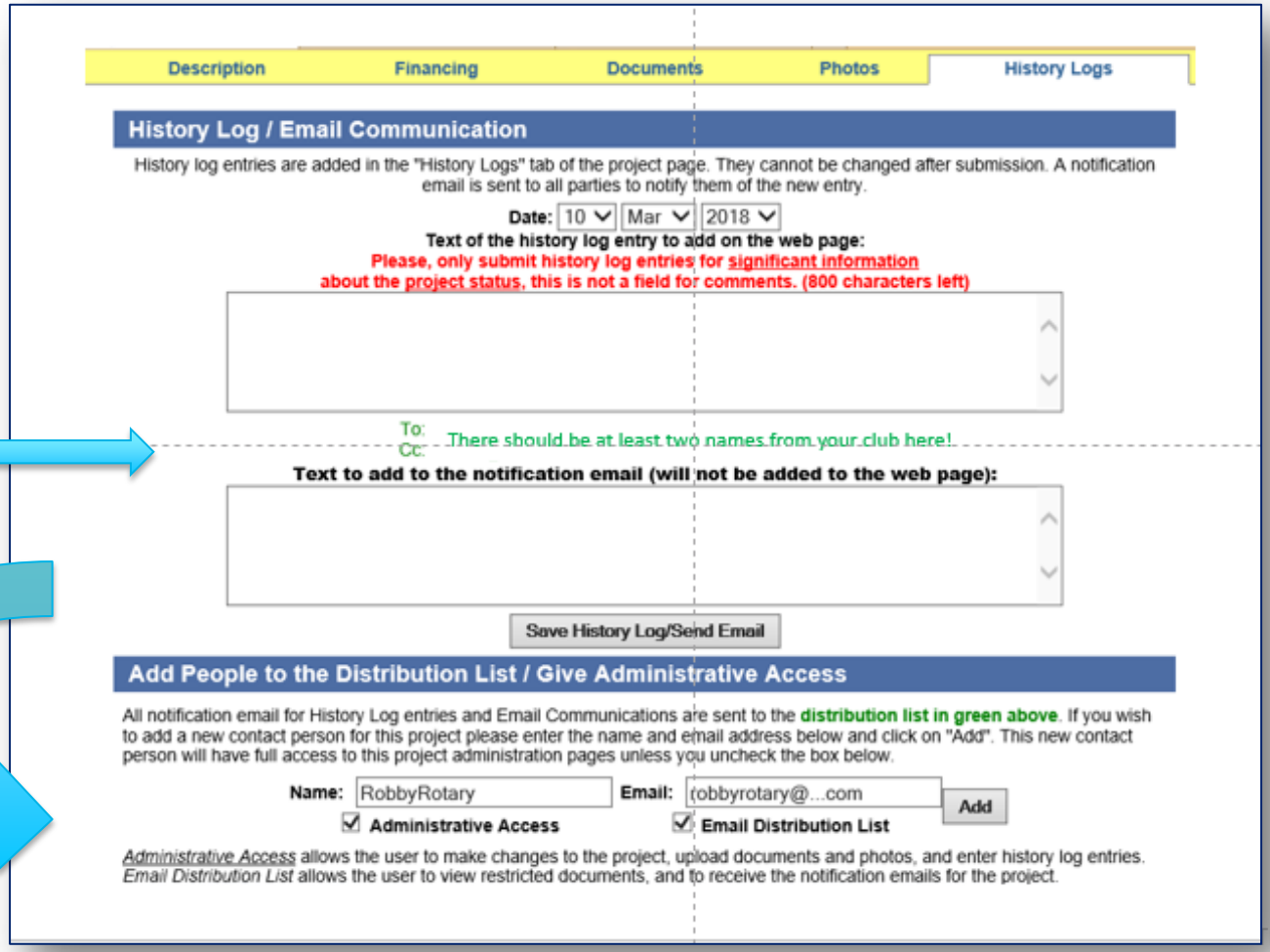
TWO ELECTRONIC SIGNATURES REPRESENTING YOUR CLUB ARE REQUIRED

Navigate to the "History Logs" page

- Add a name and email address (club president is a good idea) so that there are at least two individuals from your club

Here, you should see your name & email address, along with those of the district grants committee members



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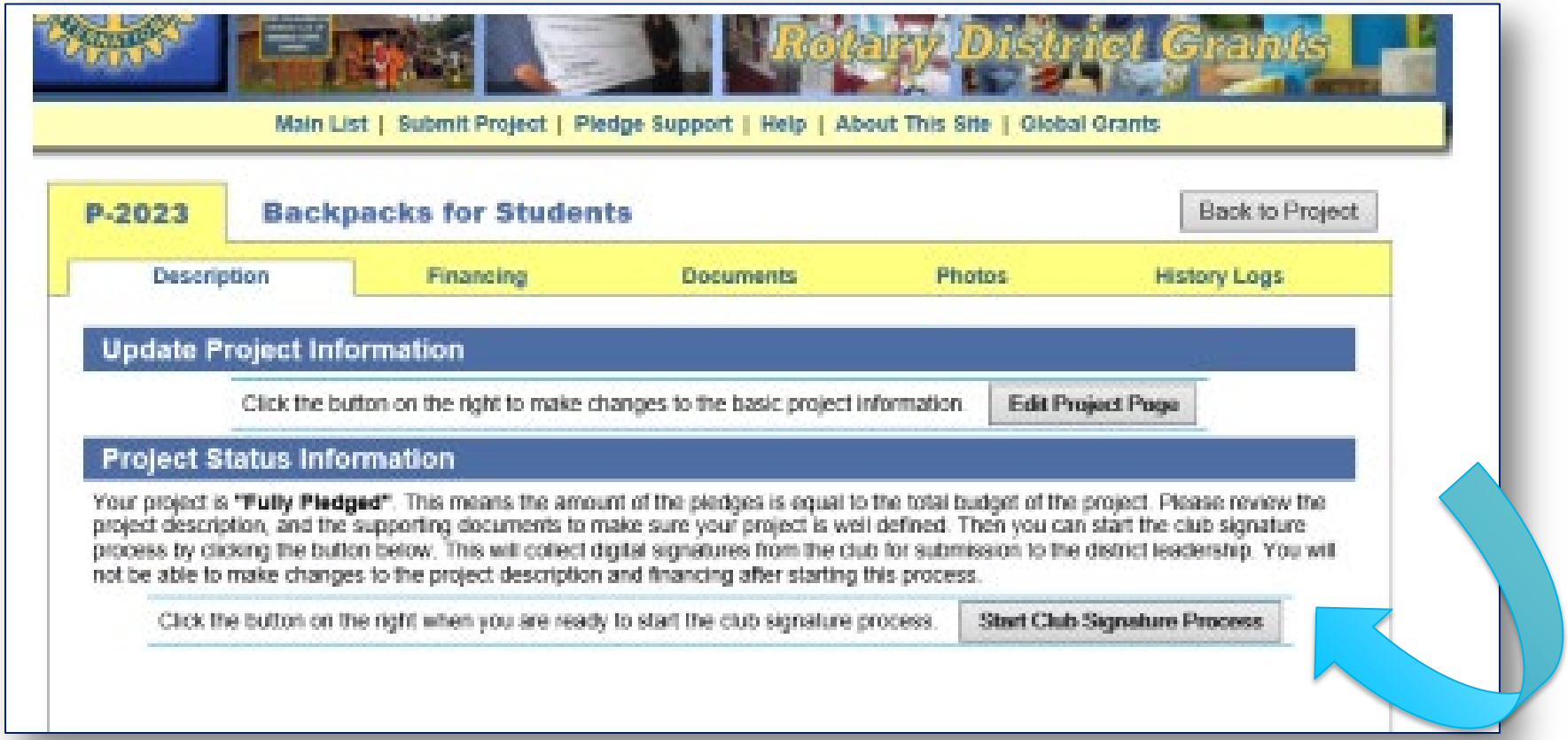
START THE ELECTRONIC SIGNATURE PROCESS

Click the “Administration” tab to return to this page

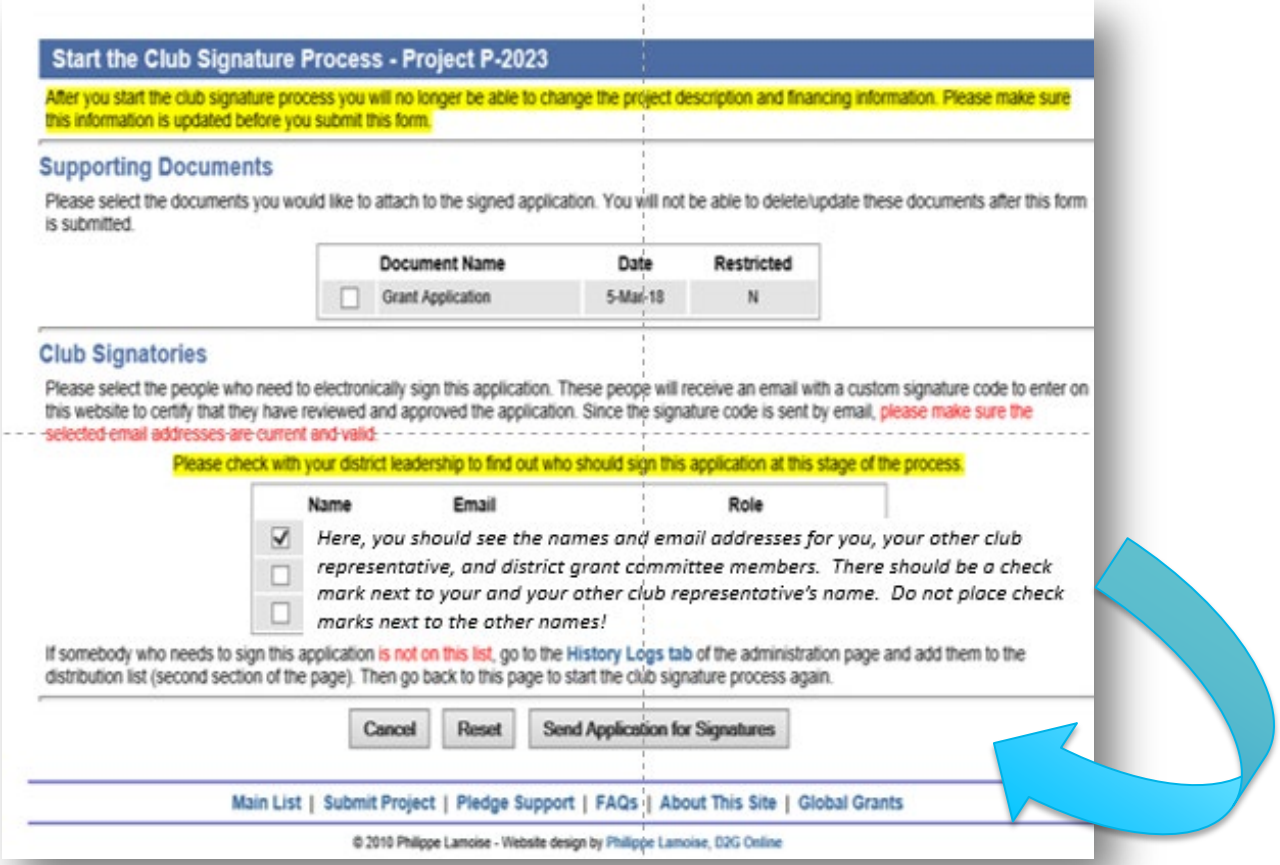
- Then click “Start Club Signature Process”



START THE ELECTRONIC SIGNATURE PROCESS

A new screen will appear

- Click “Send Application for Signature”
- The individual(s) you designated will then receive an email with instructions for approving the project via electronic signature



Step Five – District Approval of Project

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DISTRICT GRANTS COMMITTEE REVIEW PROCESS

When do we get our funds for the project?

- The District Grants Committee will review your application for completeness, accuracy, etc.
- The Grants Committee will ensure that your club has met the four requirements (payment of dues, completion of most recent district grant reporting, attendance at Grant Management Seminar, and submission of signed MOU)
- Early July: Once your application has been approved, you will receive a message from the "Rotary District Grants Website" that your project is approved and you can begin your project
- The grant check will be issued after the four requirements have been met in late July or early August

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IMPORTANT DATES

Mark your calendar for these important dates

- May 15 - Final or progress report is due for this year's projects
- June 15 - District Grant Application Deadline
- June 15-30 - District Grants Committee Review of Applications
- July 13-15 - Announcement of district grants to be awarded
- After club receives approval notification (this year) to June 30 (next year)

  - Projects must be started and completed during these dates

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FINAL REPORTING

District 5320

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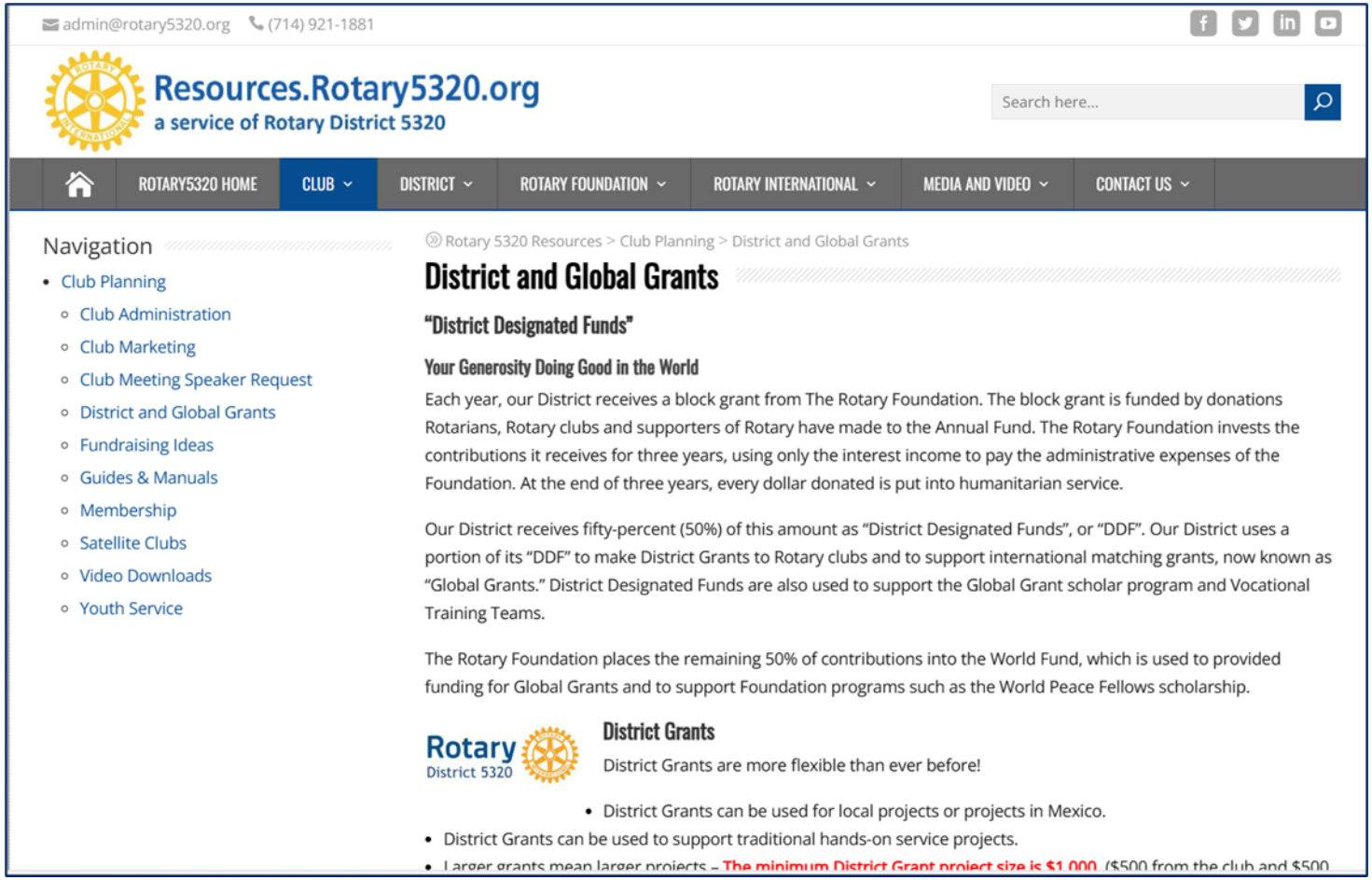
DISTRICT GRANT FINAL REPORT

Where can I find the form?

- Go to: https://resources.rotary5320.org/rotary-foundation/



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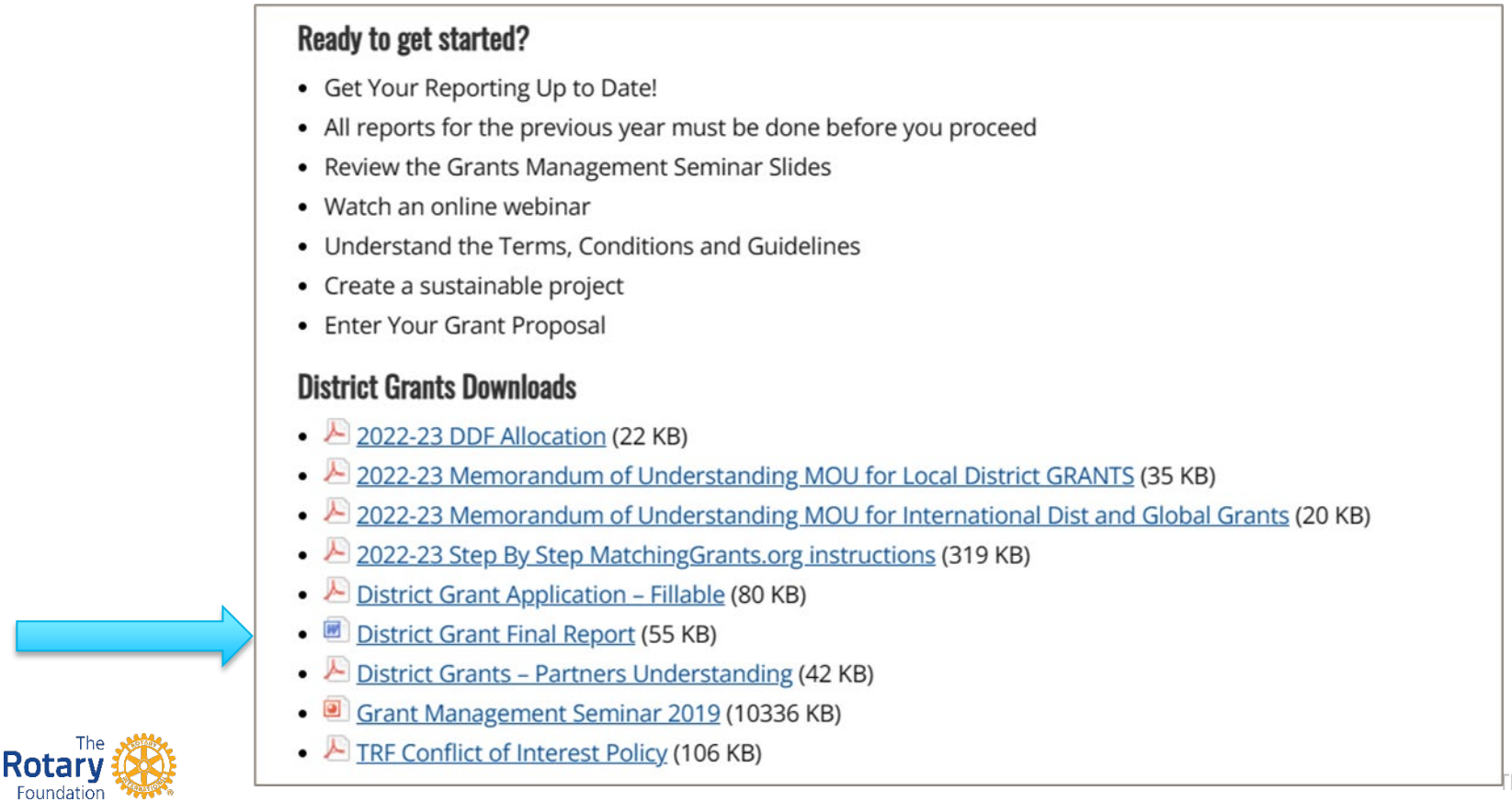
DISTRICT GRANT FINAL REPORT

Where can I find the form?

- Scroll down to select “District Grant Final Report”
- Save the file to your computer. Open the file to fill out the final report!



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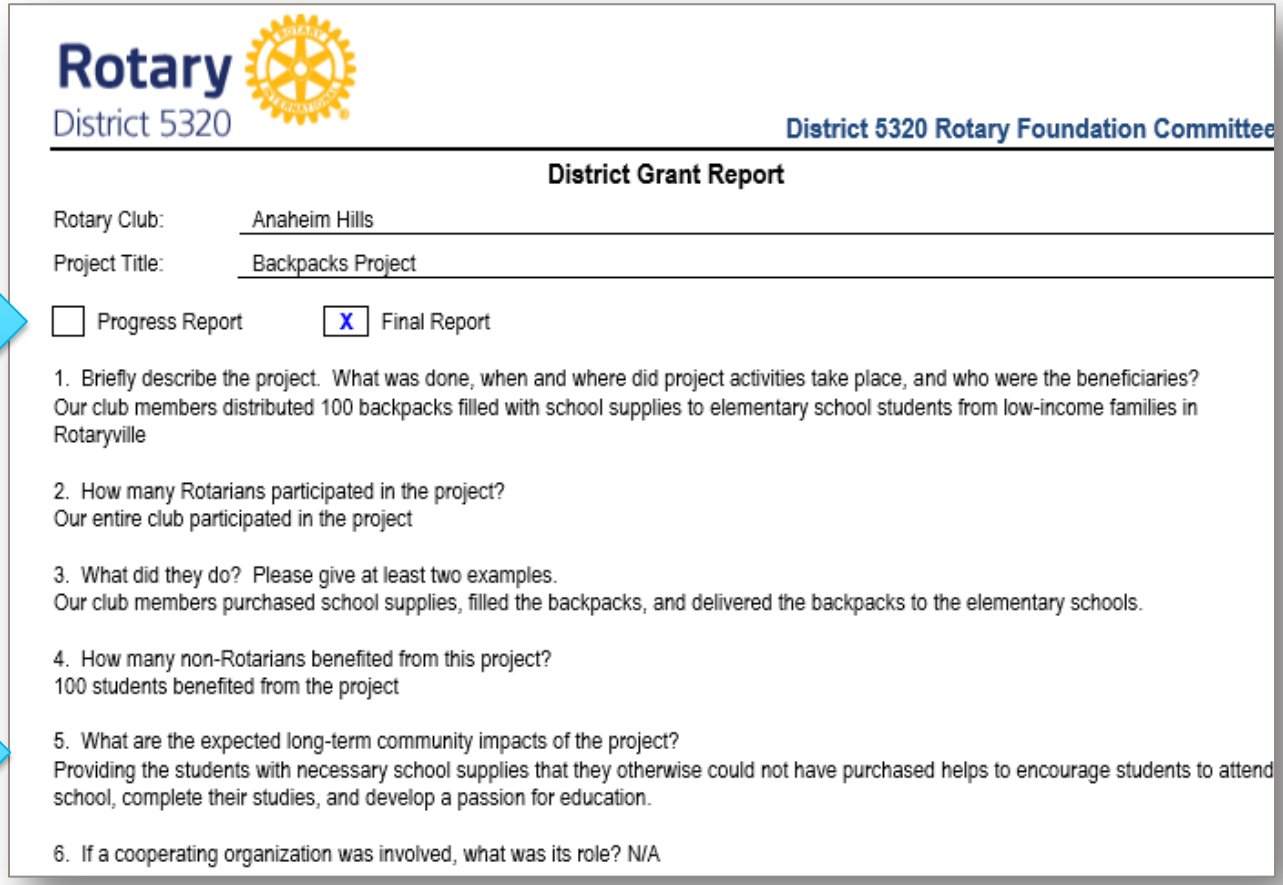
DISTRICT FINAL REPORT

Either a progress or final report must be filed by May 15

Please answer questions in detail!



Rotary District 5320

District 5320 Rotary Foundation Committee

District Grant Report

Rotary Club: Anaheim Hills

Project Title: Backpacks Project

☐ Progress Report ☒ Final Report

1. Briefly describe the project. What was done, when and where did project activities take place, and who were the beneficiaries?
Our club members distributed 100 backpacks filled with school supplies to elementary school students from low-income families in Rotaryville

2. How many Rotarians participated in the project?
Our entire club participated in the project

3. What did they do? Please give at least two examples.
Our club members purchased school supplies, filled the backpacks, and delivered the backpacks to the elementary schools.

4. How many non-Rotarians benefited from this project?
100 students benefited from the project

5. What are the expected long-term community impacts of the project?
Providing the students with necessary school supplies that they otherwise could not have purchased helps to encourage students to attend school, complete their studies, and develop a passion for education.

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

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DISTRICT FINAL REPORT (continued)

List each receipt on a separate line item. If you would like to group some expenses into a line item, prepare a sheet which shows how you added up the items!

Financial Report – Be sure that Income equals Expenditures!

7. Income

	Amount
1. District Grant funds approved by the District	1,500
2. Club contribution	1,525
3. Other funding (specify)	
Total Project Income	3,025

8. Expenditures - please be specific and add lines as needed - receipts must be attached

1. Target – Pencils, pens, binders, notebooks	1,425
2. Walmart - Backpacks	1,600
3.	
4.	
5.	
6.	
Total Project Expenditures	3,025

9. By signing this report, I confirm that to the best of my knowledge these District Grant funds were spent only for eligible items in accordance with Trustee-approved guidelines, and that all of the information contained herein is true and accurate. Receipts for all grant-funded expenditures have been provided to the district. I also understand that all photographs submitted in connection with this report will become the property of RI and will not be returned. I warrant that I own all rights in the photographs, including copyright, and hereby grant RI and TRF a royalty free irrevocable license to use the photographs now or at any time in the future, throughout the world in any manner it so chooses and in any medium now known or later developed. This includes the right to modify the photograph(s) as necessary in RI's sole discretion. This also includes, without limitation, use on or in the web sites, magazines, brochures, pamphlets, exhibitions and any other promotional materials of RI and TRF.

Certifying Signature Rita Rotary Date: 3/31/18

Print name, Rotary title, and club Vocational Director, Anaheim Hills Rotary Club

Sign your report and don't forget to save a copy of your completed form in pdf. format

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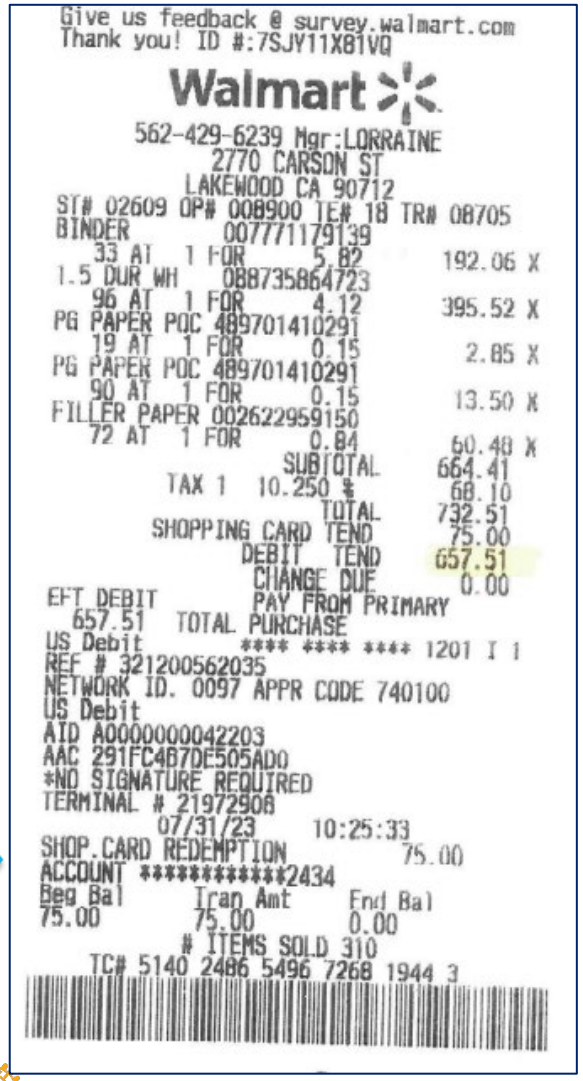
ASSEMBLE YOUR RECEIPTS



Give us feedback @ survey.walmart.com
Thank you! ID #:7SJY11X81VQ

Walmart

562-429-6239 Mgr:LORRAINE
2770 CARSON ST
LAKEWOOD CA 90712
ST# 02609 OP# 008900 TE# 18 TR# 08705
BINDER 007771179139
33 AT 1 FOR 5.82 192.06 X
1.5 DUR WH 088735864723
96 AT 1 FOR 4.12 395.52 X
PG PAPER POC 489701410291
19 AT 1 FOR 0.15 2.85 X
PG PAPER POC 489701410291
90 AT 1 FOR 0.15 13.50 X
FILLER PAPER 002622959150
72 AT 1 FOR 0.84 60.48 X
SUBTOTAL 664.41
TAX 1 10.250 % 68.10
TOTAL 732.51
SHOPPING CARD TEND 75.00
DEBIT TEND 657.51
CHANGE DUE 0.00
EFT DEBIT PAY FROM PRIMARY
657.51 TOTAL PURCHASE
US Debit **** **** **** 1201 I 1
REF # 321200562035
NETWORK ID. 0097 APPR CODE 740100
US Debit
AID A0000000042203
AAC 291FC4B7DE505ADO
*NO SIGNATURE REQUIRED
TERMINAL # 21972908
07/31/23 10:25:33
SHOP.CARD REDEMPTION 75.00
ACCOUNT **********2434
Beg Bal Tran Amt End Bal
75.00 75.00 0.00
ITEMS SOLD 310
TC# 5140 2486 5496 7268 1944 3

Scan your receipts into one pdf. file

- Ensure that the receipt details are visible, and do not fold over portions of receipt
- Must show document of payment
- **NO PICTURES OF CHECKS!**
- **MUST BE RECEIPT NOT INVOICE!**
- For receipts reported in Mexican pesos, please prepare a separate sheet with explanations of the items and the currency conversion to USD

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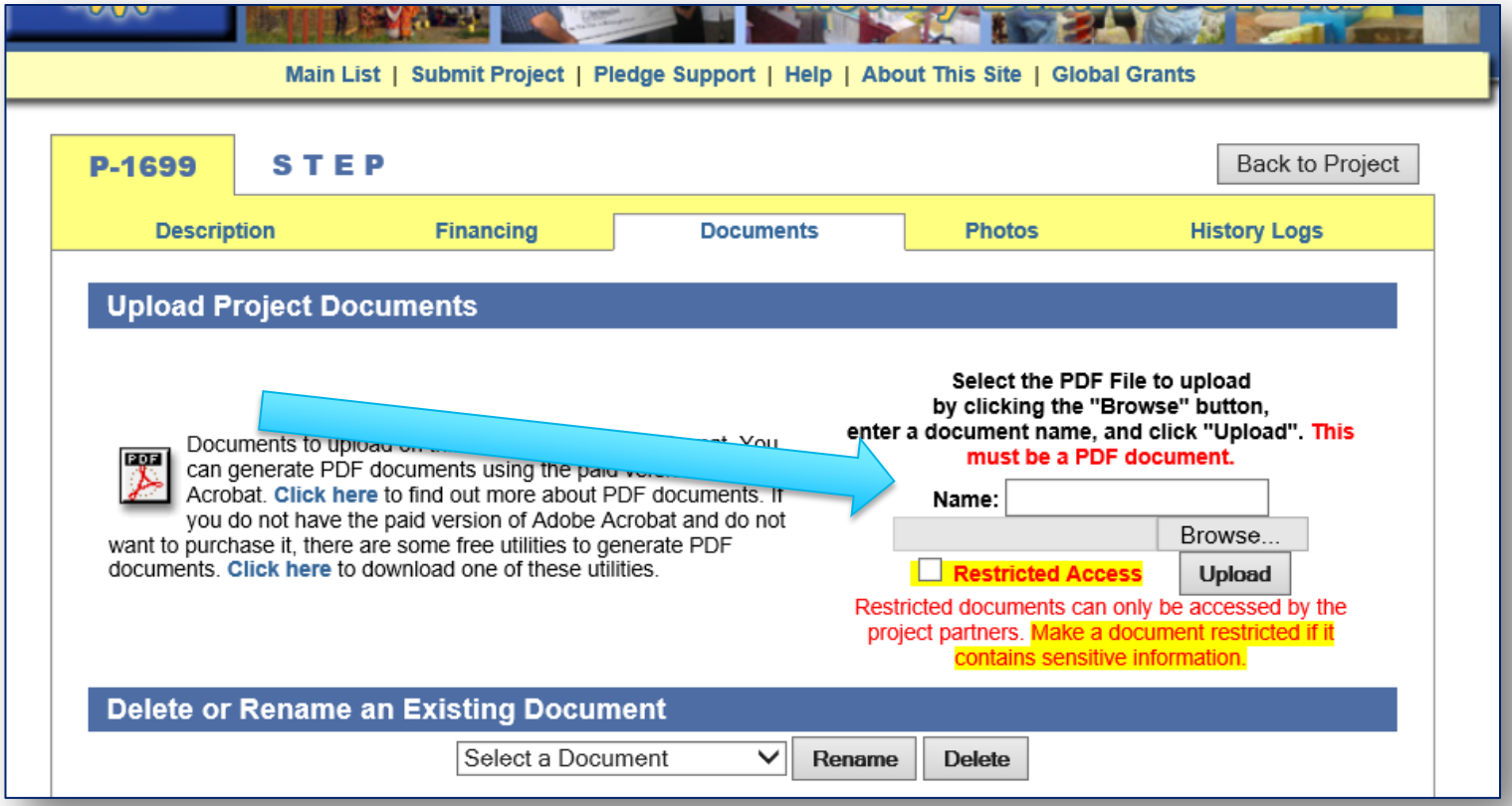
SUBMITTING YOUR FINAL REPORT AND RECEIPTS

You must submit a final or progress report along with copies of all project expenses by May 15 (i.e., projects for the 2023-2024 Rotary year need to be reported by May 15, 2024)

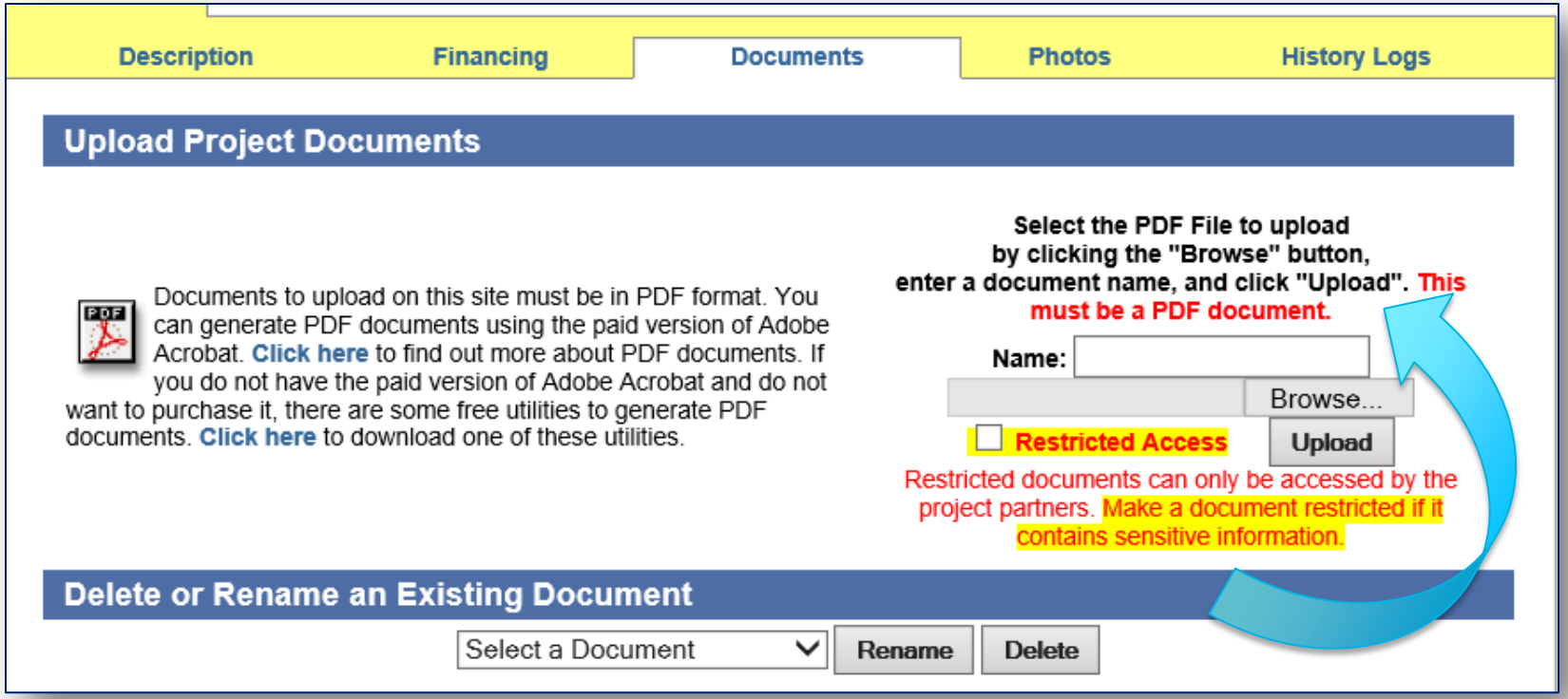
- Go to matchinggrants.org, find your project, and navigate to the “administration” tab
- Click the “documents” tab to see the screen below:



SUBMITTING YOUR FINAL REPORT AND RECEIPTS

Upload each document (report, scanned receipts, any other supporting document)

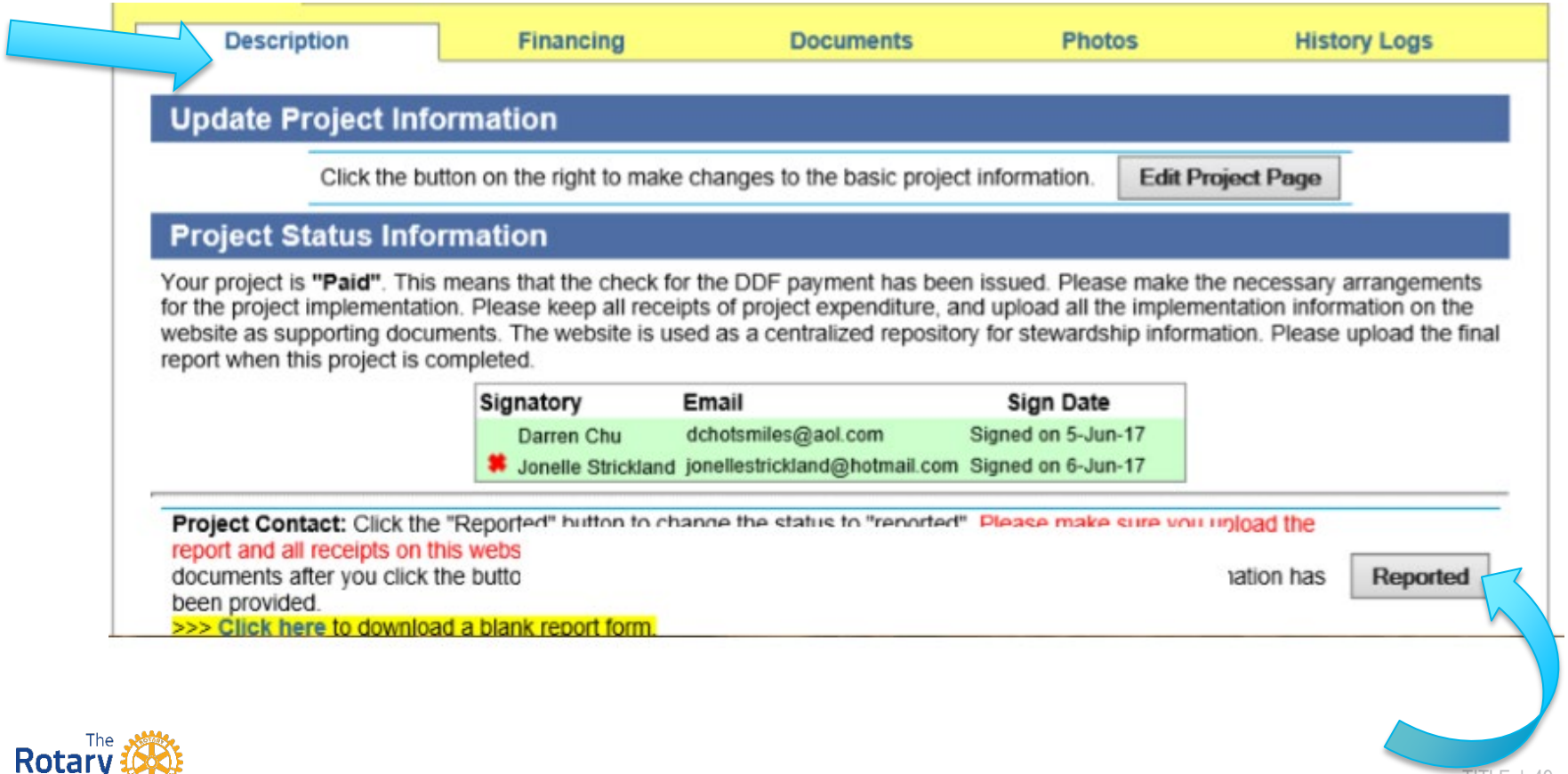
- **Documents need to be in pdf. format; the website will not accept Word, Excel, or any other document form**



READY FOR REVIEW?

Once you are satisfied that you have uploaded all your final project documents, navigate to the "description" tab, and click "Reported"

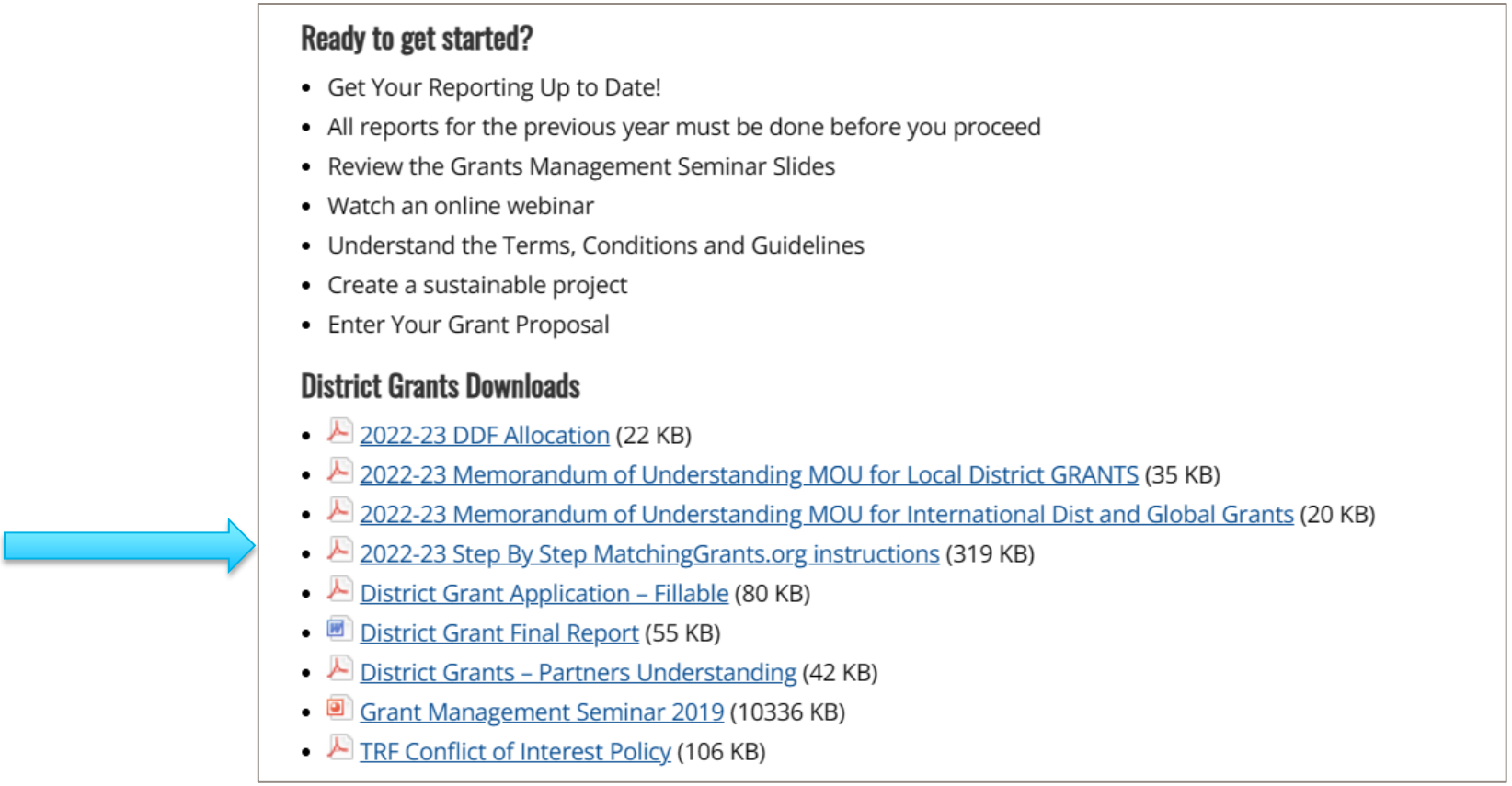
- The District Grant Committee will then review your documents and advise if anything else is required



STEP BY STEP INSTRUCTIONS IN DISTRICT GRANT DOWNLOADS

Where can I find this?

- Scroll down to select “Step by Step MatchingGrants.org instructions” (has not changed since posted)



Ready to get started?

- Get Your Reporting Up to Date!
- All reports for the previous year must be done before you proceed
- Review the Grants Management Seminar Slides
- Watch an online webinar
- Understand the Terms, Conditions and Guidelines
- Create a sustainable project
- Enter Your Grant Proposal

District Grants Downloads

- 2022-23 DDF Allocation (22 KB)
- 2022-23 Memorandum of Understanding MOU for Local District GRANTS (35 KB)
- 2022-23 Memorandum of Understanding MOU for International Dist and Global Grants (20 KB)
- 2022-23 Step By Step MatchingGrants.org instructions (319 KB)
- District Grant Application – Fillable (80 KB)
- District Grant Final Report (55 KB)
- District Grants – Partners Understanding (42 KB)
- Grant Management Seminar 2019 (10336 KB)
- TRF Conflict of Interest Policy (106 KB)

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QUALIFICATION AND STEWARDSHIP

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QUALIFICATION REQUIREMENTS

- Attend a Grant Management Seminar
  - 2 Club Members
- Submit signed club Memorandum of Understanding (MOU)

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TERMS OF QUALIFICATION

- Valid for one year
- Club responsible for grant funds
- Disclose conflicts of interest
- Cooperate with all audits
- Use grant funds properly
- Implement the club MOU

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MAINTAINING QUALIFICATION

- Follow terms of club MOU
- Appoint a club member or committee to manage club qualification
- Fully implement stewardship practices to prevent misuse of funds

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DISTRICT GRANT MOU SIGNING

WHO SHOULD SIGN THE DISTRICT MOU?

- Clubs applying for a District Grant for a local community-based project only

- District MOU must be signed by President Elect (2024-2025) and Project Chair

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CONTACTS 2024-2025

District Rotary Foundation Committee Chair

Kevin Padilla rotarykevin@att.net

District Grants Chair

Gillian Bradshaw gillian_bradshaw@yahoo.com

Global Grants Chair

Harish Murthy harish@irvinerotary.org

District Governor

Chris Skorina cskorina@skorinalaw.com

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THANK YOU!

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