



DISTRICT GRANT MANAGEMENT SEMINAR

District 5320 March 2025

PURPOSE

- Manage a Rotary District 5320 District grant
- Stewardship expectations
- Implementing the MOU
- Qualify clubs to receive grant funds

2024-2025 PROJECTS

- 56 projects with 33 participating clubs
- Over \$90k in DDF; Almost \$245k total project funding
- Wide variety with thousands of beneficiaries
- Check them out at matchinggrants.org

2024-2025 SO MUCH SERVICE ABOVE SELF!

Backpacks,
books, bicycles,
shoes & more!

Drowning
prevention

Play spaces & toy
house

Murals &
Peace Pole

Thanksgiving
for veterans

First aid clinics & kits

Equine therapy

Youth Fishing
Derby

House builds &
sanitation in
Mexico

Food drives,
packaging,
pantries &
pasta dinners

RYLA

Toy drives
& Santas

Ocean
restoration,
wetlands cleanup

Teacher Grants

Senior center &
scout hut
refurbishments

Foster kid support

Boys and Girls Club
projects galore!

Park, nature center
& garden
revitalization, urban
forests

Children's
Outreach concert

First
responder
supplies

SmileMakers for
lonely seniors

Homeless shelter
transition to apartments

Mutt run for Animal
Care Services

Dental & eye clinics
in Mexico

LET'S UNITE FOR GOOD AND DO MORE IN 2025-26!

Club	DDF
Anaheim	\$1,539
Anaheim Hills	\$3,800
Avalon	\$2,407
Brea	\$2,454
Coto de Caza - Rancho Santa Margarita	\$842
Fountain Valley	\$1,497
Fullerton	\$8,000
Fullerton Sunrise	\$1,938
Garden Grove	\$1,826
Huntington Beach	\$1,724
Irvine	\$8,000
La Habra	\$3,491
Laguna Beach	\$2,760
Lakewood	\$4,914
Long Beach	\$8,000
Los Al/Cypress/Seal Beach	\$4,037
Mission Viejo	\$8,000
Monarch Beach Sunrise	\$6,849
North East Orange County Leadership	\$580
Newport Balboa	\$8,000

Club	DDF
Newport Mesa	\$942
Norwalk/Santa Fe Springs	\$2,150
Orange	\$1,891
Orange County LA	\$1,037
Orange Plaza	\$1,352
Placentia	\$3,760
San Clemente	\$8,000
San Juan Capistrano	\$8,000
Santa Ana	\$545
Seal Beach City	\$500
Signal Hill	\$6,469
Surf City Huntington Beach	\$2,621
The City of Santa Ana	\$500
Tustin-Santa Ana	\$4,729
Villa Park	\$8,000
Westminster	\$500
Whittier	\$2,117
Whittier Sunrise	\$2,326
Yorba Linda Sunrise	\$7,417

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

\$1,000
contribution

\$500

Up to \$250
For District Grants
(the other 50% is for
matching club donations
to Global Grants)

\$500
Earmarked

.8:1 match of World Fund to DDF
for Global Grants

DDF and World Fund can also
support PolioPlus, Rotary Peace
Centers, or disaster relief

OVERVIEW OF ROTARY FOUNDATION GRANTS

- Two types:
 - Global Grants
 - District Grants
- Decision-making power at the club and district levels
- Simplified leadership structures





APPLYING FOR A DISTRICT GRANT

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, then grant funds (DDF) are issued to your club!

Step One – Meet Club Requirements

FOUR CLUB REQUIREMENTS

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

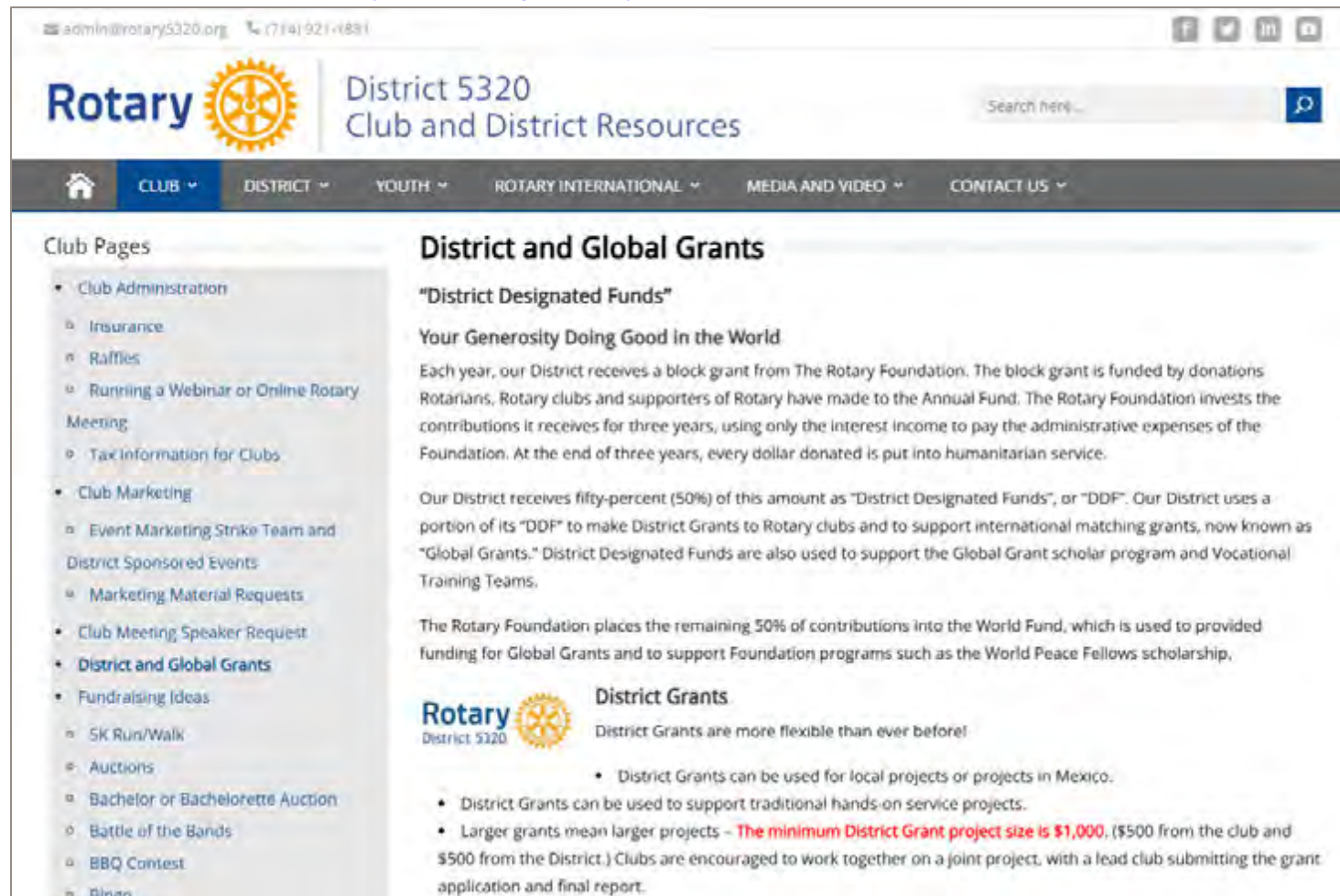
- Dues to Rotary International and District 5320 are current (July dues are paid)
- Prior year district grant final report (or progress report) is filed by May 15 (report with receipts have been posted to the matchinggrants.org website)
- Two club members have attended the most recent District Grants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

Step Two – Complete Your Grant Application

DISTRICT GRANT APPLICATION

Where can I find the form?

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



The screenshot shows the website for Rotary District 5320. The header includes the Rotary logo, the text "District 5320 Club and District Resources", and a search bar. The navigation menu includes "CLUB", "DISTRICT", "YOUTH", "ROTARY INTERNATIONAL", "MEDIA AND VIDEO", and "CONTACT US". The main content area is titled "District and Global Grants" and features a sub-section "District Designated Funds". The text explains that the District receives a block grant from The Rotary Foundation, which is used to support various programs, including District Grants and Global Grants. A sidebar on the left lists "Club Pages" such as "Club Administration", "Club Marketing", and "District and Global Grants".

admin@rotary5320.org (714) 921-4881

Rotary District 5320 Club and District Resources

Search here...

Home CLUB DISTRICT YOUTH ROTARY INTERNATIONAL MEDIA AND VIDEO CONTACT US

Club Pages

- Club Administration
 - Insurance
 - Raffles
 - Running a Webinar or Online Rotary Meeting
 - Tax Information for Clubs
- Club Marketing
 - Event Marketing Strike Team and District Sponsored Events
 - Marketing Material Requests
- Club Meeting Speaker Request
- **District and Global Grants**
- Fundraising Ideas
 - 5K Run/Walk
 - Auctions
 - Bachelor or Bachelorette Auction
 - Battle of the Bands
 - BBQ Contest
 - Bingo

District and Global Grants

"District Designated Funds"

Your Generosity Doing Good in the World

Each year, our District receives a block grant from The Rotary Foundation. The block grant is funded by donations Rotarians, Rotary clubs and supporters of Rotary have made to the Annual Fund. The Rotary Foundation invests the contributions it receives for three years, using only the interest income to pay the administrative expenses of the Foundation. At the end of three years, every dollar donated is put into humanitarian service.

Our District receives fifty-percent (50%) of this amount as "District Designated Funds", or "DDF". Our District uses a portion of its "DDF" to make District Grants to Rotary clubs and to support international matching grants, now known as "Global Grants." District Designated Funds are also used to support the Global Grant scholar program and Vocational Training Teams.

The Rotary Foundation places the remaining 50% of contributions into the World Fund, which is used to provide funding for Global Grants and to support Foundation programs such as the World Peace Fellows scholarship.

Rotary District 5320 District Grants

District Grants are more flexible than ever before!

- District Grants can be used for local projects or projects in Mexico.
- District Grants can be used to support traditional hands-on service projects.
- Larger grants mean larger projects - **The minimum District Grant project size is \$1,000.** (\$500 from the club and \$500 from the District.) Clubs are encouraged to work together on a joint project, with a lead club submitting the grant application and final report.

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

-  [2025-2026 DDF Allocation](#) (326 KB)
-  [2025-26 Memorandum of Understanding MOU for Local District Grants](#) (53 KB)
-  [2025-26 Memorandum of Understanding MOU for International District and Global Grants](#) (91 KB)
-  [2024 District Grants Presentation from DTA March 2024](#) (22 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)
-  [TRF Conflict of Interest Policy](#) (106 KB)

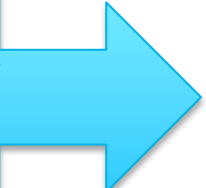


DISTRICT GRANT APPLICATION – Page 1

***Correct
contact
information is
critical!***



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



District Grant Application

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

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.”

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.)

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	\$	

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

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.”

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.”

Detail the activities of the project

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):

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.”

This replaces the previous requirement for a separate budget!

Step Three – Submit Your Application

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"

Developed by District 5340
for use by the entire Rotary world

My Account | Search | Contact Us

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

Welcome to the Rotary District Grants Website

Look below for a list of project. Use the search box to find a specific project.
Click on My Account to login and see your projects.

P- Go

Rotary Year
2023-24 ▼

List of Projects - 2023-

#	Title	Country	Location	District	Club	Amount	Status
P-4609	3rd Grade Literacy	USA	Anchorage	5010	Anchorage South	\$8,000	Fully Pledged
P-4492	Water for Schools Nueva Rosita	Mexico	Nueva Rosita, Coahuila MX	5340	Coronado Binacional	\$6,000	Fully Pledged
P-4510	Indigenous Peacebuilding	USA	Oceanside	5340	San Luis Rey (Oceanside)	\$1,500	Fully Pledged
P-4517	Student Workforce Development	USA	Escondido, CA	5340	Escondido After Five	\$7,000	Fully Pledged
P-4509	Peacebuilder Program	USA	Oceanside	5340	San Luis Rey (Oceanside)	\$1,000	Fully Pledged
P-4518	The Lever - Mental Health	USA	San Diego County, CA	5340	Rancho Bernardo (San Diego)	\$10,000	Need \$9,000
P-4496	Music for Kids in Need	Mexico	Tijuana	5340	Coronado Binacional	\$1,000	Fully Pledged
P-4564	Interfaith Network Carlsbad	USA	Carlsbad	5340	Carlsbad	\$7,000	Signed
P-4495	Toys for Poor Kids in Tijuana	Mexico	Tijuana	5340	Coronado Binacional	\$1,000	Fully Pledged
P-4494	Books for Kids	USA	Coronado, CA	5340	Coronado Binacional	\$1,000	Fully Pledged
P-4493	Arts Education	USA	Coronado, CA	5340	Coronado Binacional	\$1,000	Fully Pledged
P-4580	Dendleton School of Infantrv	USA	Camp Dendleton, Oceanside	5340	Carlsbad	\$61,000	Need \$52,500

SUBMITTING A NEW PROJECT

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



The screenshot shows the website's header with the Rotary International logo on the left. The navigation bar includes links for "My Account", "Search", and "Contact Us". Below the navigation bar is a banner with the text "Rotary District Grants" and several small images showing community projects. A secondary navigation bar contains links for "Main List", "Submit Project", "Pledge Support", "Help", "About This Site", and "Global Grants". The main content area is titled "Submit a Project" and contains the following text:

Please read carefully before submitting a project.

Projects on this website are usually submitted by a Rotarian from the project primary club.

You can submit a new project to be published on this website. You should do so if you want to go through your district approval process. Your project will be included in the [Main List](#) and anybody can review the project description. You will be notified by email when your project has moved to the next level in the approval process, or when you are requested to do something.

When submitting a new project, make sure you include a complete description. Only projects with a detailed description will be accepted on this site. Give us an email address that you check very often, as this is the only way you will be notified when changes are made to your project. You can submit pictures and other supporting documents to describe your project.

Before you begin, please be familiar with the [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#).

[>> Submit a New Project <<](#)



SUBMITTING A NEW PROJECT

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

Developed by District 5340
for use by the entire Rotary world

My Account | Search | Contact Us

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

Cancel Reset Save

Your Information

This must be **YOUR name and YOUR email address** if you are not the primary contact for this project, otherwise you will not be granted access to the project administration

Your Name Your Email

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 checked="" 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."

Select
"2025-
2026"

SUBMITTING A NEW PROJECT

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

Just type
"see
attached
application"

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.

See attached application

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

Club
contribution
must at least
match DDF



UPLOADING YOUR APPLICATION

This new screen will appear; click "administration" button

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

P-2023 **Backpacks for Students** Administration

Description Financing Documents Photos History Logs

Project Description

Country: USA Location: Anaheim Hills Total Budget: \$3,000
Area of Focus: Basic education and literacy
Activity Type: Education: General
Summary: 100 backpacks provided to elementary students from low-income families in Rotaryville

See attached application

Project Contact Person

District: 5320 Rotary Club of: Anaheim Hills
Primary Contact: Rita Rotary Email: ritarotary@...com

Project Status

Awaiting Review
This project is "**Proposed**". This project needs to be reviewed by the website administrator to validate its content.
Need to raise: -
Project listed for the 2018-19 Rotary Year.

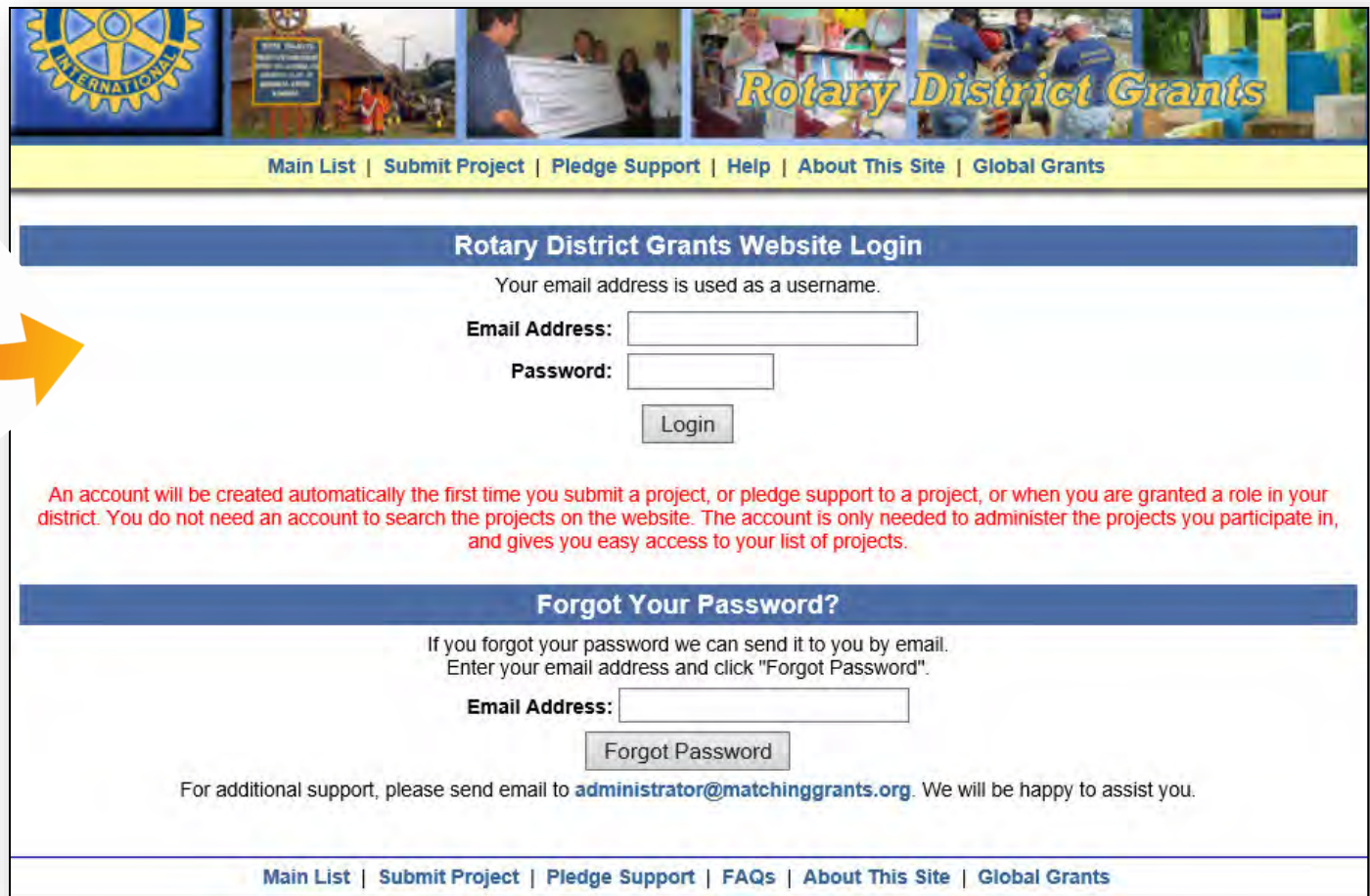
Main List | Submit Project | Pledge Support | FAQs | About This Site | Global Grants

Click
"Administration"
to
continue

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



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

Rotary District Grants Website Login

Your email address is used as a username.

Email Address:

Password:

An account will be created automatically the first time you submit a project, or pledge support 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.

Forgot Your Password?

If you forgot your password we can send it to you by email.
Enter your email address and click "Forgot Password".

Email Address:

For additional support, please send email to administrator@matchinggrants.org. We will be happy to assist you.

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

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

The screenshot shows the 'Documents' tab of a project page titled 'P-2023 Backpacks for Students'. A blue arrow points from the 'Documents' tab to the 'Upload Project Documents' section. This section contains a PDF icon and text explaining that uploads must be in PDF format. To the right, there is a form with a 'Name:' field, a 'Browse...' button, a 'Restricted Access' checkbox, and an 'Upload' button. A yellow arrow points from a yellow callout box on the right towards the 'Upload' button.

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

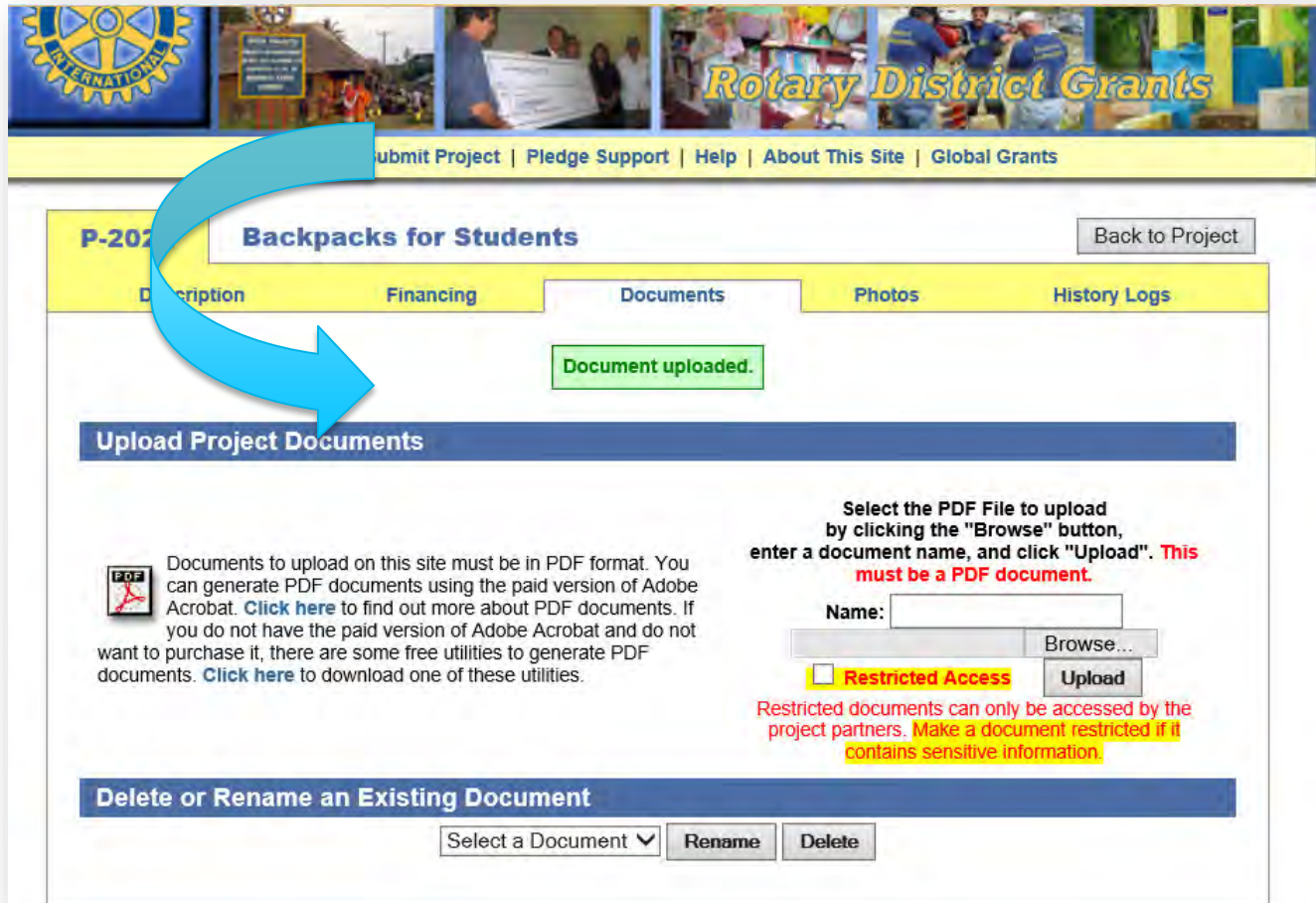
Restricted documents can only be accessed by the project partners. **Make a document restricted if it contains sensitive information.**

*Remember!
Uploads
must be in
pdf format*

UPLOADING YOUR APPLICATION

Look for the upload confirmation

- The "Document uploaded" message will appear



The screenshot displays the Rotary District Grants application interface. At the top, there is a navigation bar with links: "Submit Project | Pledge Support | Help | About This Site | Global Grants". Below this, the project title "P-202 Backpacks for Students" is shown, along with a "Back to Project" button. A navigation menu includes "Description", "Financing", "Documents", "Photos", and "History Logs". A green box with the text "Document uploaded." is prominently displayed in the center. Below this, a blue header reads "Upload Project Documents". The main content area contains instructions: "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." To the right, there is a form for uploading a PDF file, including a "Name:" field, a "Browse..." button, a "Restricted Access" checkbox, and an "Upload" button. A red warning message states: "Restricted documents can only be accessed by the project partners. Make a document restricted if it contains sensitive information." At the bottom, a blue header reads "Delete or Rename an Existing Document", followed by a dropdown menu "Select a Document" and "Rename" and "Delete" buttons.

Step Four – Obtain Electronic Signatures

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

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: 10 Mar 2018

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: There should be at least two names from your club here!

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

Save History Log/Send Email

Add People to the Distribution List / Give Administrative Access

All notification email for History Log entries and Email Communications are sent to the **distribution list in green above**. If you wish to add a new contact person for this project please enter the name and email address below and click on "Add". This new contact person will have full access to this project administration pages unless you uncheck the box below.

Name: RobbyRotary Email: robyrotary@...com Add

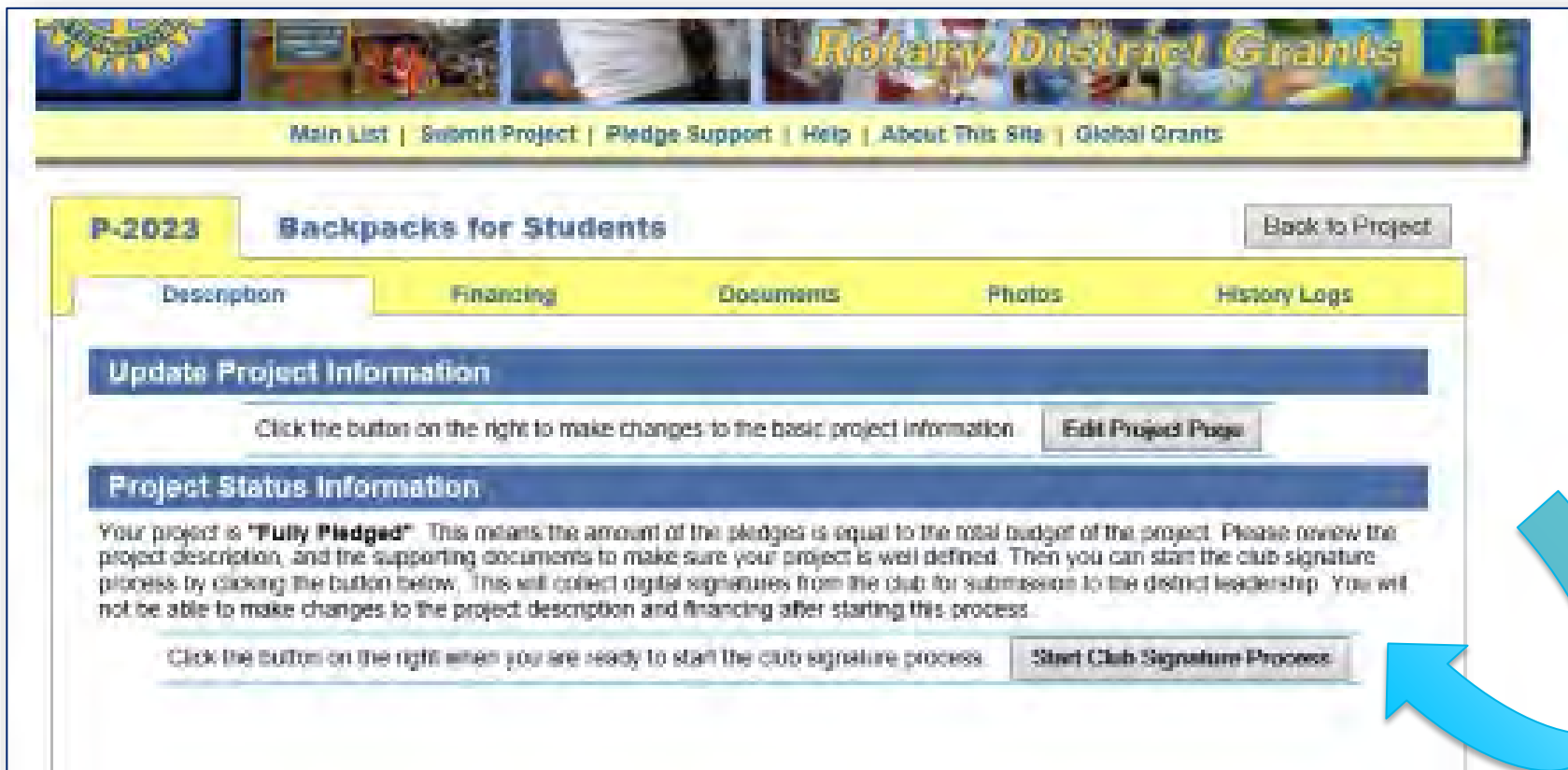
Administrative Access Email Distribution List

Administrative Access allows the user to make changes to the project, upload documents and photos, and enter history log entries. Email Distribution List allows the user to view restricted documents, and to receive the notification emails for the project.

START THE ELECTRONIC SIGNATURE PROCESS

Click the “Administration” tab to return to this page

- Then click “Start Club Signature Process”



The screenshot displays the Rotary District Grants website interface. At the top, there is a banner with the text "Rotary District Grants" and a navigation menu with links: "Main List", "Submit Project", "Pledge Support", "Help", "About This Site", and "Global Grants". Below the banner, the page title is "P-2023 Backpacks for Students" with a "Back to Project" button. A navigation bar contains tabs for "Description", "Financing", "Documents", "Photos", and "History Logs". The "Description" tab is active. Under "Update Project Information", there is an "Edit Project Page" button. The "Project Status Information" section states: "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." At the bottom of this section is a "Start Club Signature Process" button. A large blue arrow points from the bottom right towards the "Start Club Signature Process" button.

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

Start the Club Signature Process - Project P-2023

After you start the club signature process you will no longer be able to change the project description and financing information. Please make sure this information is updated before you submit this form.

Supporting Documents

Please select the documents you would like to attach to the signed application. You will not be able to delete/update these documents after this form is submitted.

Document Name	Date	Restricted
<input type="checkbox"/> Grant Application	5-Mar-18	N

Club Signatories

Please select the people who need to electronically sign this application. These people will receive an email with a custom signature code to enter on this website to certify that they have reviewed and approved the application. Since the signature code is sent by email, please make sure the selected email addresses are current and valid.

Please check with your district leadership to find out who should sign this application at this stage of the process.

Name	Email	Role
<input checked="" type="checkbox"/>		Here, you should see the names and email addresses for you, your other club representative, and district grant committee members. There should be a check mark next to your and your other club representative's name. Do not place check marks next to the other names!
<input type="checkbox"/>		
<input type="checkbox"/>		

If somebody who needs to sign this application is not on this list, go to the History Logs tab of the administration page and add them to the distribution list (second section of the page). Then go back to this page to start the club signature process again.

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

© 2018 Philippe Lamotte - Website design by Philippe Lamotte, O2G Online

Note: do not check District staff

Step Five – District Approval of Project

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.
- They will ensure that your club has met the four requirements (payment of dues, completion of most recent district grant reporting, attendance at District Grants 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, typically in late July or early August

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





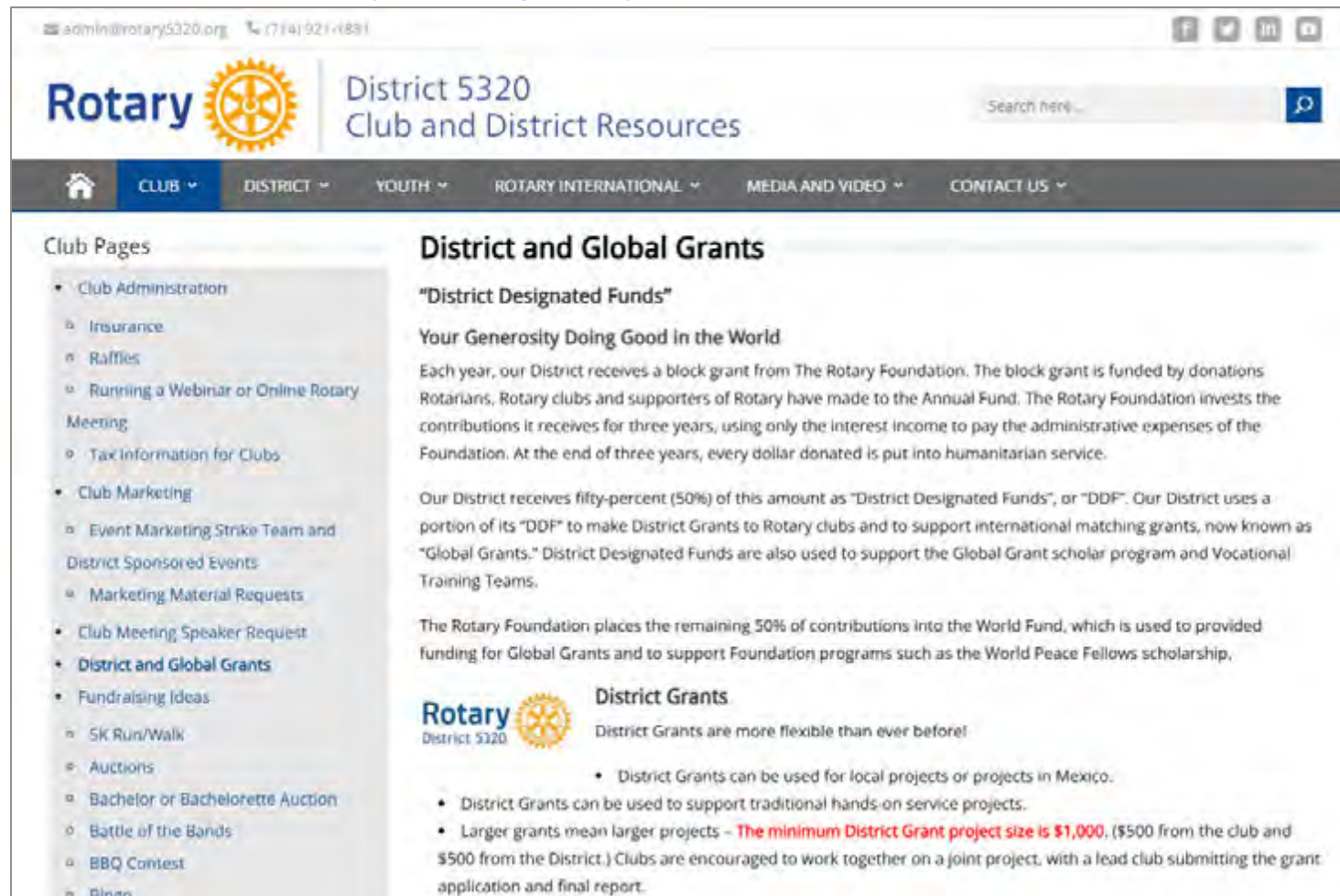
FINAL REPORTING

District 5320

DISTRICT GRANT FINAL REPORT

Where can I find the form?

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



The screenshot shows the website for Rotary District 5320. The header includes the Rotary logo, the text "District 5320 Club and District Resources", and a search bar. The navigation menu includes "CLUB", "DISTRICT", "YOUTH", "ROTARY INTERNATIONAL", "MEDIA AND VIDEO", and "CONTACT US". The main content area is titled "District and Global Grants" and features a sub-section "District Designated Funds". The text explains that the District receives a block grant from The Rotary Foundation, which is used to support international matching grants, now known as "Global Grants." It also mentions that the District uses a portion of its "DDF" to make District Grants to Rotary clubs and to support international matching grants, now known as "Global Grants." The remaining 50% of contributions is placed into the World Fund, which is used to provide funding for Global Grants and to support Foundation programs such as the World Peace Fellows scholarship.

District and Global Grants

"District Designated Funds"

Your Generosity Doing Good in the World

Each year, our District receives a block grant from The Rotary Foundation. The block grant is funded by donations Rotarians, Rotary clubs and supporters of Rotary have made to the Annual Fund. The Rotary Foundation invests the contributions it receives for three years, using only the interest income to pay the administrative expenses of the Foundation. At the end of three years, every dollar donated is put into humanitarian service.

Our District receives fifty-percent (50%) of this amount as "District Designated Funds", or "DDF". Our District uses a portion of its "DDF" to make District Grants to Rotary clubs and to support international matching grants, now known as "Global Grants." District Designated Funds are also used to support the Global Grant scholar program and Vocational Training Teams.

The Rotary Foundation places the remaining 50% of contributions into the World Fund, which is used to provide funding for Global Grants and to support Foundation programs such as the World Peace Fellows scholarship.

Rotary District 5320

District Grants

District Grants are more flexible than ever before!

- District Grants can be used for local projects or projects in Mexico.
- District Grants can be used to support traditional hands-on service projects.
- Larger grants mean larger projects - **The minimum District Grant project size is \$1,000.** (\$500 from the club and \$500 from the District.) Clubs are encouraged to work together on a joint project, with a lead club submitting the grant application and final report.

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!

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

-  [2025-2026 DDF Allocation](#) (326 KB)
-  [2025-26 Memorandum of Understanding MOU for Local District Grants](#) (53 KB)
-  [2025-26 Memorandum of Understanding MOU for International District and Global Grants](#) (91 KB)
-  [2024 District Grants Presentation from DTA March 2024](#) (22 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)
-  [TRF Conflict of Interest Policy](#) (106 KB)



DISTRICT GRANT 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

DISTRICT GRANT FINAL REPORT (continued)

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	Amount
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

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!

ASSEMBLE YOUR RECEIPTS



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
- If a check was written to an organization to purchase supplies, the list of supplies and costs must be provided with a receipt
- If there are a lot of receipts please provide a summary listing each one in order



SUBMITTING YOUR FINAL REPORT AND RECEIPTS

You must submit a final or progress report along with copies of all project expenses by May 15

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

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

P-1699 **STEP** [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. **Alternatively, you can generate PDF documents. If you do not have the paid version of Adobe Acrobat, you can generate PDF documents. If you 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

SUBMITTING YOUR FINAL REPORT AND RECEIPTS

SPECIAL NOTE FOR THIS YEAR ONLY:

- You will be reporting on the DDF that is in the **Note to File** on the project's Documents tab, as the numbers were adjusted after they were entered into the master database in matchinggrants.org

The screenshot shows the Rotary District Grants Website interface. At the top, it says "Developed by District 5340 for use by the entire Rotary world" and "My Account | Search | Contact Us". Below this is a banner with the Rotary logo and "Rotary District Grants Website". A navigation bar includes "Main List | Submit Project | Pledge Support | Help | About This Site | Global Grants". The main content area shows project details for "P-5257 Ryla" with an "Administration" button. There are tabs for "Description", "Financing", "Documents", "Photos", and "History Logs". The "Documents" tab is active, showing a section titled "Project Supporting Documents" with a dropdown menu set to "Alphabetical with icons". Two documents are listed: "[3-Aug-24] Note to file - DDF adjustment" and "[11-Jun-24] RYLA grant application 24-25". A blue arrow points to the first document.

SUBMITTING YOUR FINAL REPORT AND RECEIPTS

SPECIAL NOTE FOR THIS YEAR ONLY:

- You will be reporting on the DDF that is in the “Note to File” on the project’s Documents tab, as the numbers were adjusted after they were entered into the master database in matchinggrants.org

NOTE TO FILE – DDF ADJUSTMENT FOR DISTRICT 5320 2024-25 DISTRICT GRANTS

Date: August 2, 2024

Club Name: Irvine

Project #: P-5257

Project Title: RYLA

On July 24, 2024, District Governor Chris Skorina and District Foundation Chair Kevin Padilla provided an updated DDF list based on the funding available from The Rotary Foundation, which differed from the District’s original estimate.

To manage this, rather than asking each club to resubmit their project, it was determined that District Grants Chair (Gillian Bradshaw) (with input from each club) would upload a Note to file the Documents tab for each project, providing the new DDF, club contribution, and total project cost.

For P-5257 these amounts are:

DDF: \$950

Club Funds: \$1,500

Project Total: \$2,450

It is this document that will be used as a reference for the finances when the Final Report is submitted in Spring 2025.

Gillian Bradshaw
District Grants Chair, District 5320

The club funds can be higher but must at least match the DDF

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

The screenshot shows a web interface with a yellow navigation bar containing tabs for 'Description', 'Financing', 'Documents', 'Photos', and 'History Logs'. The 'Documents' tab is active. Below the navigation bar is a blue header for 'Upload Project Documents'. The main content area is split into two columns. The left column contains a PDF icon and text explaining that documents must be in PDF format and providing links for more information and utilities. The right column contains instructions to click 'Browse' to select a PDF file, enter a name, and click 'Upload'. A blue arrow points from the 'Upload' button to the 'Restricted Access' checkbox. Below the instructions is a form with a 'Name:' label, a text input field, a 'Browse...' button, a 'Restricted Access' checkbox, and an 'Upload' button. At the bottom, there is a blue header for 'Delete or Rename an Existing Document' with a dropdown menu labeled 'Select a Document' and 'Rename' and 'Delete' buttons.

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.**

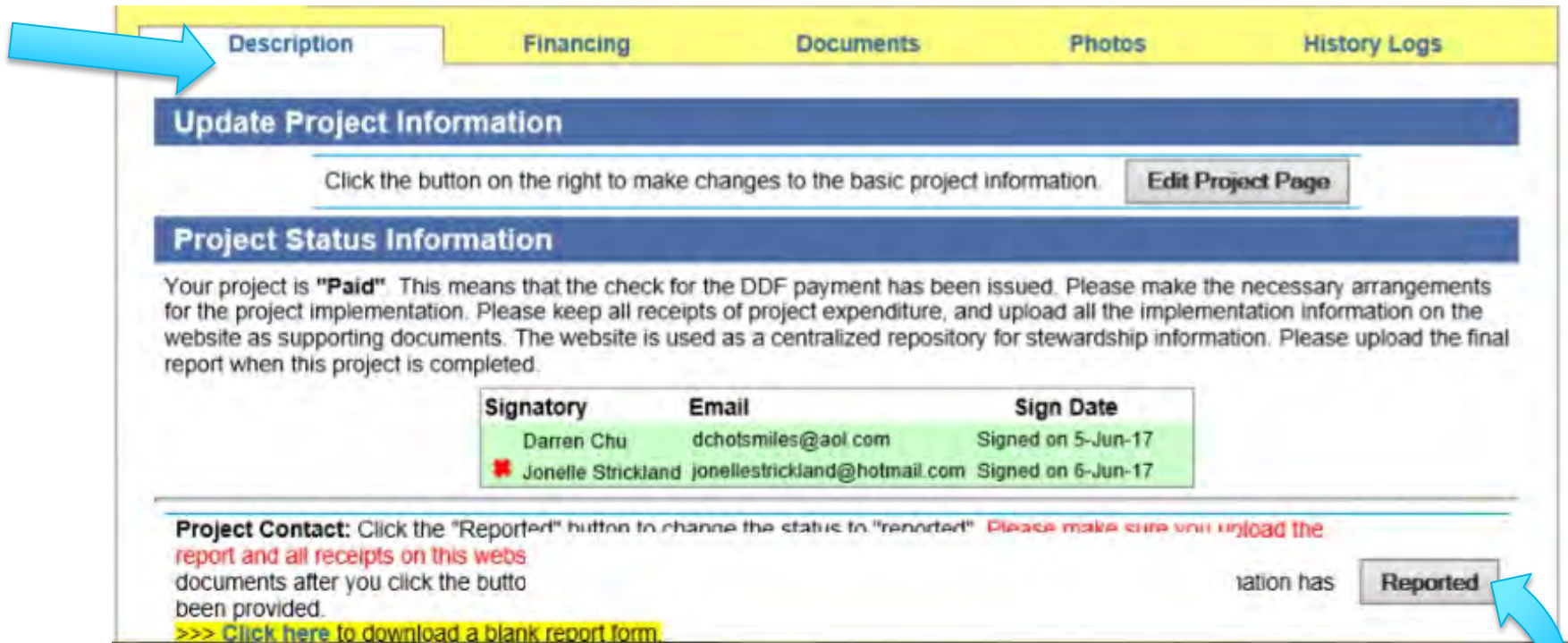
Delete or Rename an Existing Document

Select a Document

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



The screenshot shows a web interface with a yellow navigation bar containing tabs: Description, Financing, Documents, Photos, and History Logs. A blue arrow points to the 'Description' tab. Below the navigation bar is a blue header for 'Update Project Information' with a button 'Edit Project Page'. Underneath is a section for 'Project Status Information' with a paragraph of text. A table lists signatories: Darren Chu and Jonelle Strickland. At the bottom, there is a 'Project Contact' section with a 'Reported' button highlighted by a blue arrow.

Signatory	Email	Sign Date
Darren Chu	dhotsmiles@aol.com	Signed on 5-Jun-17
Jonelle Strickland	jonellestrickland@hotmail.com	Signed on 6-Jun-17



QUALIFICATION AND STEWARDSHIP

QUALIFICATION REQUIREMENTS

- (Any) two club members have attended a District Grants Grant Management Seminar
 - For projects in Mexico, (any) two club members must also participate in Global Grant training:
 - Live: April 26, District Office
 - Online: learn.rotary.org/members/learn/learning-plans/101/grant-management-seminar
 - Recertification online: learn.rotary.org/members/learn/courses/2193/grant-management-recertification-2024-25
- Submit signed club Memorandum of Understanding (MOU) (2025-26 President and Project Chair)
 - Email to gillian_bradshaw@yahoo.com
 - Projects in Mexico require a TRF MOU (signed by 2025-26 and 2026-27 Presidents)

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

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

CONTACTS 2025-2026

District Rotary Foundation Committee Chair

Kevin Padilla

rotarykevin@att.net

District Grants Chair

Gillian Bradshaw

gillian_bradshaw@yahoo.com

District International Service Chair

Harish Murthy

harish@irvinerotary.org

District Governor

Craig Livingston

craig92821@gmail.com



THANK YOU!