



# **DISTRICT GRANT'S**

## **FY2023 ASSEMBLY**



Welcome to the new and hopefully improved, District Grant program.

All correspondence with the grants committee should be sent to:  
**[grants@montanarotary.org](mailto:grants@montanarotary.org)**.

District Grants can be awarded to Clubs that qualify which requires two items to be completed:

1. One Club member attends training in person or through RI Learning site.
2. The Club submits the Financial MOU.

Clubs that do not qualify can apply for grants; however, this is an exception and not the rule.

# GRANT LIFE CYCLE



Draft	Authorization	Submitted	Approved	Completion
Rotary members plan a project or scholarship and build their grant application online	Club and district leaders review the application and authorize funding	The grant's planners submit the application to The Rotary Foundation	If the grant is approved, the Foundation issues payment	Members carry out the project, reporting to the Foundation annually until the work or studies are finished and the grant is closed



There is a life cycle to the Grant year.

The process starts in the current fiscal year for the next fiscal year.





e.g. FY 2023 grant applications were submitted in FY 2022.

# GRANT LIFE CYCLE



Draft

**The Club brainstorms grant ideas based upon Rotary International 7 Areas of Focus**

1. Environment 
2. Peacebuilding and Conflict Prevention 
3. Disease Prevention and Treatment 
4. Water, Sanitation, and Hygiene 



The club drafts a proposal based upon one of the 7 areas of Focus.

# GRANT LIFE CYCLE



Draft

**5. Maternal and Child Health**



**6. Basic Education and Literacy**



**7. Community Economic Development**



# GRANT LIFE CYCLE



**Draft**

**The Club members plan a project or scholarship and build their grant application online at [www.montanarotary.org](http://www.montanarotary.org)**

**The Club submits a Signed MOU to the District at**

**The soft deadline for this step January 31<sup>st</sup>.**



At least 1 Club member must be designated to the Grants Committee to have access to the database in ClubRunner to apply and manage a grant.

There is no limit to the number of Club Members who can be designated.

The Grants tab is only visible when logging into [montanarotary.org](http://montanarotary.org).

A club that does not use Clubrunner can still utilize the District site.

**SOFT DEADLINE: January 31**

Walk through of Grants submission will follow.

# GRANT LIFE CYCLE



## Authorization

**The District Governor's and Grant Committee Review Applications.**

**Proposed Funding Amounts Are Sent to Clubs.**

**The soft deadline for this step February 28/29.**



District Governors review the grant applications with the Grants Committee.

Proposed District funding is offered to the Clubs for acceptance.

District Grants typically do not exceed 1/2 of the total Financial requirement of the project.

Soft Deadline is the end of February.

# GRANT LIFE CYCLE



## **Submit to The Rotary Foundation**

**The District Grant Committee submits the Applications to The Rotary Foundation**

**The soft deadline for this step March 31.**



Upon funding acceptance by the Clubs the Grants Committee submits for the Funding to The Rotary Foundation.

Once approved by TRF additional District Grant applications for the current fiscal year cannot be accepted as TRF only allows one District submission a year.

Soft deadline is March 31.

# GRANT LIFE CYCLE



## Approval & Funding

**Upon Approval from The Rotary Foundation District Grant Funds are Transferred to the District for Disbursement**

**The soft deadline for this step July 1.**



Funds are sent to the District once approved by TRF.

When the funds are received by the District they are distributed to the clubs.

Clubs cannot expend funds prior to funding.



# GRANT LIFE CYCLE



## Completion

**Club Members Carry Out the Project**

**Final Report is Posted to [www.montanarotary.org](http://www.montanarotary.org)**

**The soft deadline for this step June 30.**



Upon completion of the project the final report is completed and transmitted to the Grants committee.

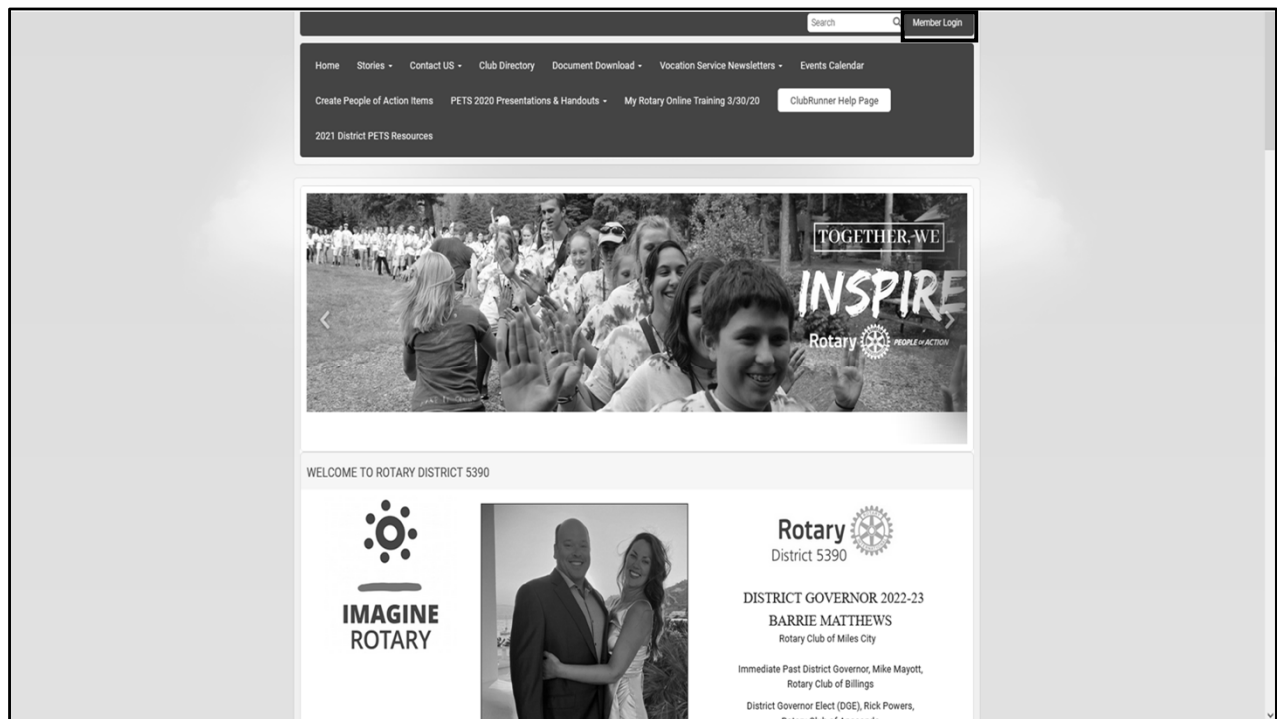
The Soft deadline is June 30.

# WALK THROUGH SUBMITTING A DISTRICT GRANT REQUEST

[www.montanarotary.org](http://www.montanarotary.org)  
Member Area  
Grants Tab



Slides document an example of the District Grants process.



Designated Club member(s) login to : [WWW.MONTANAROTARY.ORG](http://WWW.MONTANAROTARY.ORG)

## ClubRunner

[Home](#)

Enter your login information below:

Username

[Forgot username?](#)

5390Grants

Password

[Forgot password?](#)

••••

☐ Keep me logged in

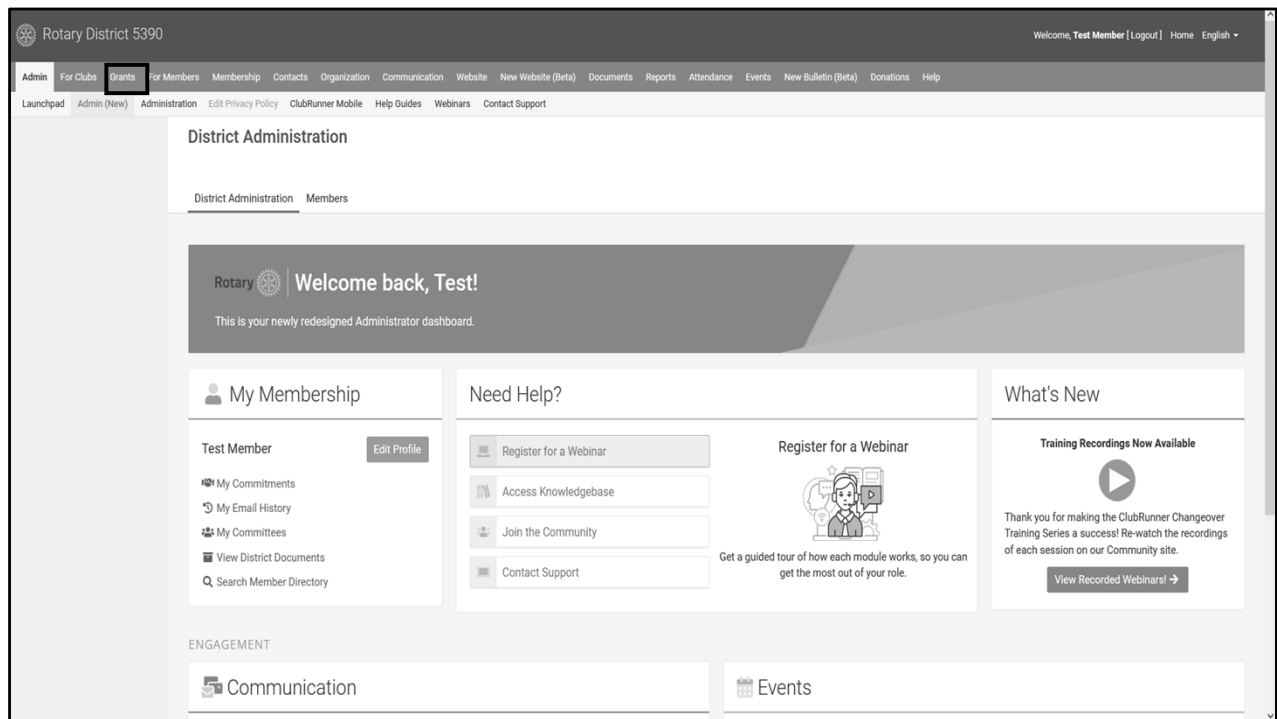
[New user?](#)

Login

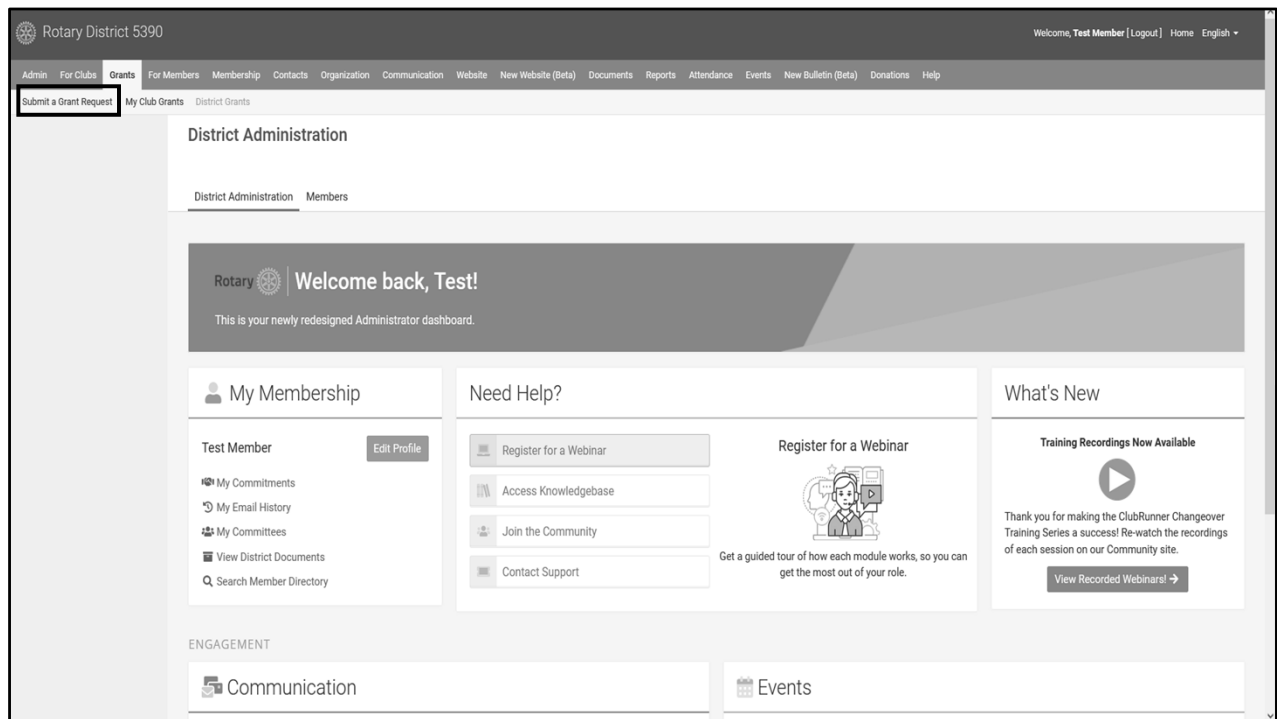
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[Privacy Statement](#) | [Online Help](#) | [System Requirements](#)



Select MEMBER AREA



SELECT GRANTS TAB



SELECT "SUBMIT A GRANT REQUEST"

The Rotary Foundation Host Dashboard - Air... Home - Yellowstone C... Intuit Expert Portal On... 1 - Dashboard - Googl... Projects Live Video | Mountain ... Logoff User After Idle Deploying Systemidle... Reports | My Rotary Rotary District 5390 Yo... Other Bookmarks

GRANTS MODULE

If you are submitting a grant request on behalf of multiple clubs, you only need to submit this form once, and there must be one main sponsoring club. Enter the estimated budget requested at this stage; you will be able to refine this number later on in the application process once this initial request has been submitted and reviewed.

Note that you will need to be a certified member in order to submit a request. If you do not have the proper access, please contact the District Grants committee at [grants@montanarotary.org](mailto:grants@montanarotary.org)

### Project Details

Project Name:  \*

Please select the year this project will be completed. Once selected, the year cannot be changed.

Project Year:  \*

Sponsoring Club:

Contact:

Country:

State:

Zip Code:

City:

Description:  \*

Estimated Budget:

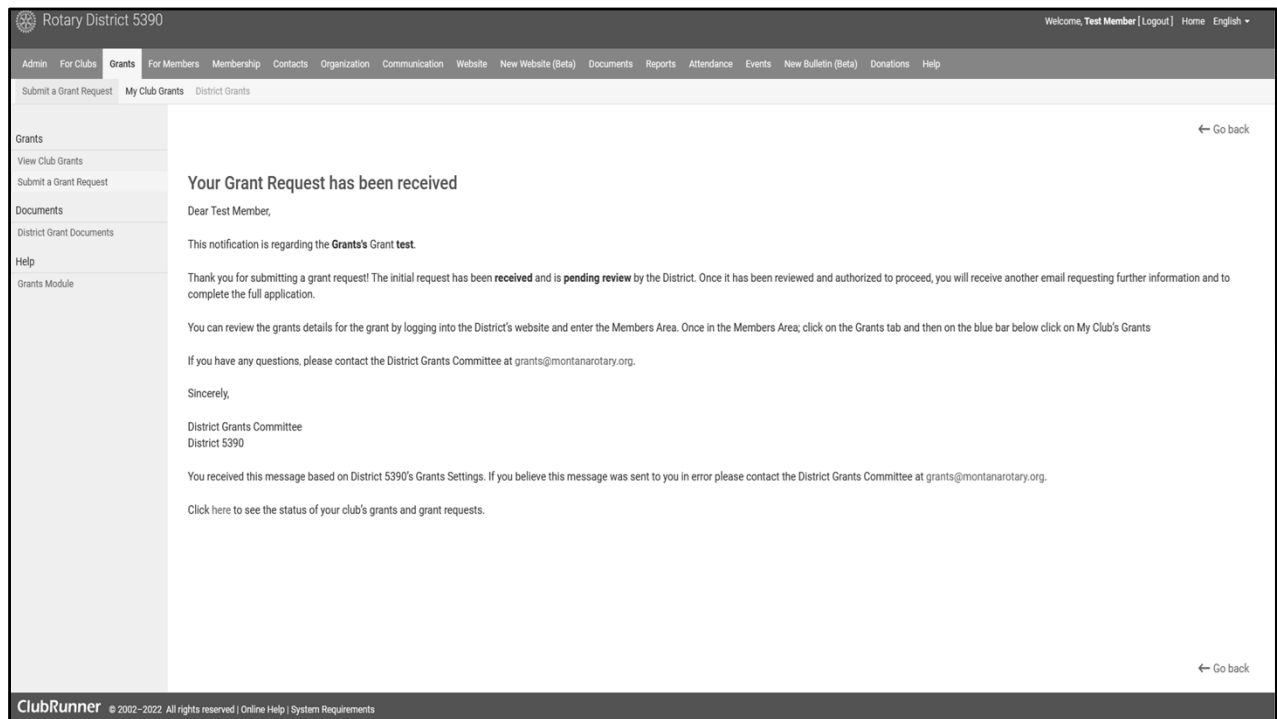
Cancel

COMPLETE THE BRIEF DESCRIPTION OF THE GRANT REQUEST.

DO NOT WRITE A BOOK.

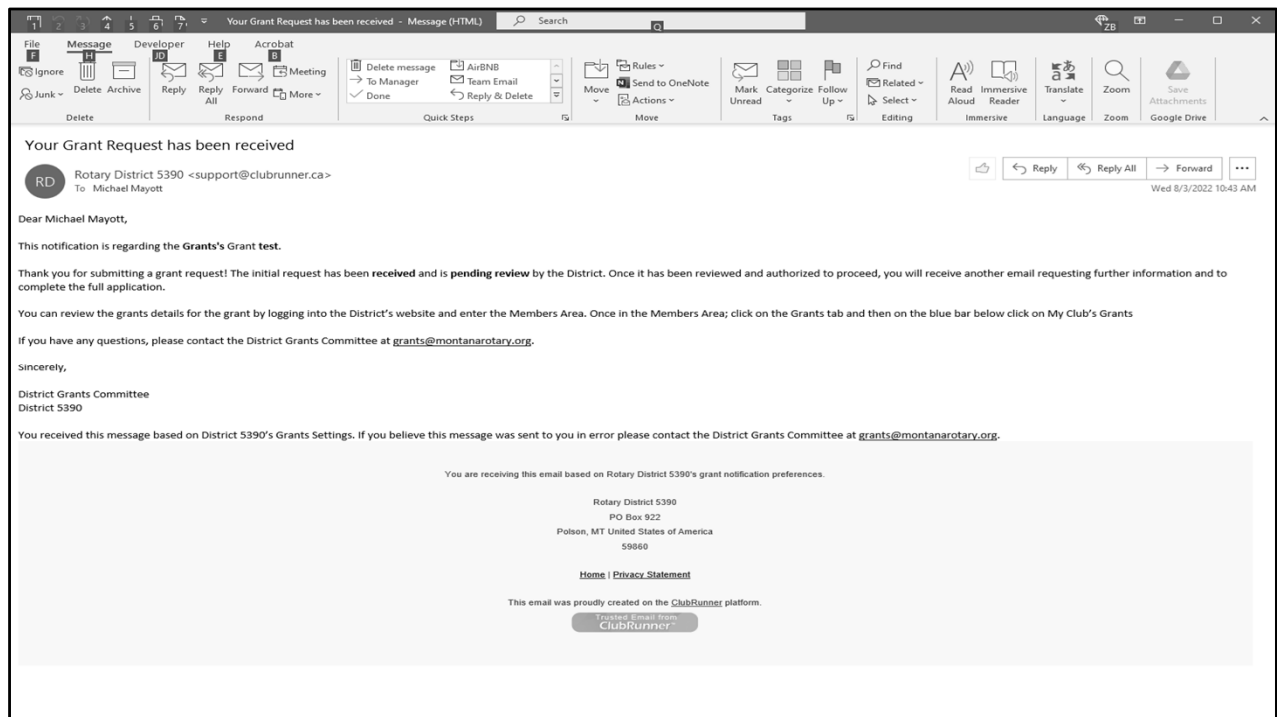
USE THE “SUBMIT” BUTTON TO SEND TO THE GRANTS COMMITTEE.



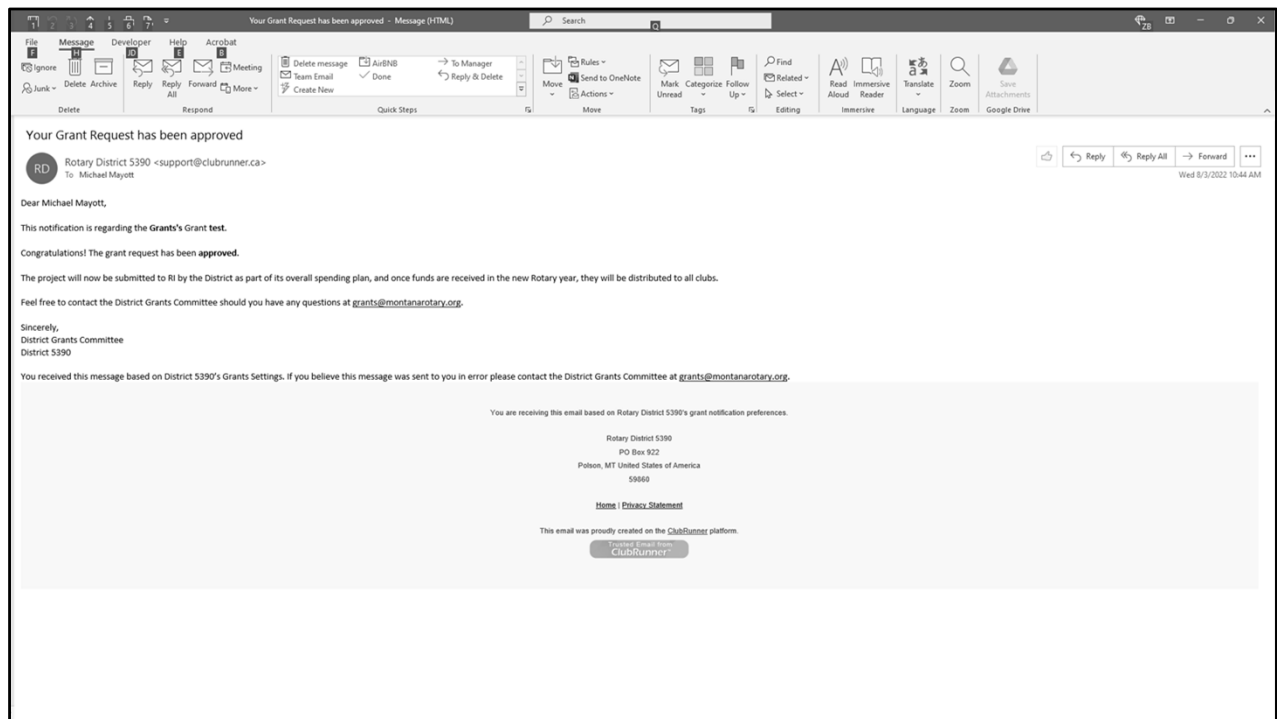


AN ACKNOWLEDGEMENT SCREEN IS SHOWN.

YOU MAY WANT TO TAKE A SCREEN SHOT AND KEEP FOR CLUB RECORDS.



THE CLUB WILL RECEIVE AN EMAIL ACKNOWLEDGING RECEIPT OF THE REQUEST.



ONCE YOUR GRANT HAS BEEN APPROVED YOU WILL RECEIVE AN EMAIL NOTIFYING YOU.

You will be notified by email of the approved amount of funding authorized; you must reply to [grants@montanarotary.org](mailto:grants@montanarotary.org) your acceptance of the funding amount.

Rotary District 5390

Welcome, Test Member [Logout] Home English

Admin For Clubs **Grants** For Members Membership Contacts Organization Communication Website New Website (Beta) Documents Reports Attendance Events New Bulletin (Beta) Donations Help

Submit a Grant Request My Club Grants District Grants

Grants  
View Club Grants  
Submit a Grant Request  
Documents  
District Grant Documents  
Help  
Grants Module

Grant Request Applications

« Previous Year | 2022 - 23 | Next Year »

Any Status

Filter by Status: Any Status

Filter records:

Submitted	Project Name	Sponsoring Club	Estimated Budget	Grant Amount
1 Approved				
Aug 03, 2022	2 test	Grants	\$0.00	\$0.00 3 Open

Showing 1 to 1 of 1 records

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Entering the Grants tab at montantarotary.org under the MY GRANTS tab you will see your grant has been approved.

Open your Grant request by clicking on the name or Open links.

[View Your Grants](#)  
[Submit a Grant Request](#)  
**Documents**  
[District Grant Documents](#)  
[Help](#)  
[Grants Module](#)

test

Grant Project: test  
Primary Sponsoring Club: Grants  
Contact: Member, Test  
Date Submitted: Aug 03, 2022 at 11:01 AM  
Project Total Budget: \$0.00  
Project Total Financing: \$0.00  
Requested Grant Amount: \$0.00

Status: **Approved** (Approved for \$00.00)  
[Make Adjustments](#) [Cancel Grant](#)

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived

Click on any of the tabs below to access and update the various sections of this Grant application.

Details
Application
Budget
Documents
Project Overview
Individual Project Report
Activity Log

This is a General description of the Grant project. Outline in detail the humanitarian need your project will address, the intent of the project, how the project will be implemented, and how Rotarians will be directly involved in the project. Note that the Estimated budget is only the initial grant request amount; to outline details on the various budget items, including those from other funding sources, go to the Budget tab.

Project Name:

Country:

State:

Zip Code:

City:

Description:

Note the highlighted headings; this is where the details are provided.

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The screenshot shows a web browser window with the URL <https://grant.dubrunner.ca/50013/Grant/Detail?id=786d4a3a-08a0-4ac8-9067-241b92919da5&Year=2022&SelectedTab=Details>. The page title is "test | Rotary District 5390". The navigation bar includes tabs: Details, Application, Budget, Documents, Project Overview, Individual Project Report, and Activity Log. The "Details" tab is active.

A message states: "This is a General description of the Grant project. Outline in detail the humanitarian need your project will address, the intent of the project, how the project will be implemented, and how Rotarians will be directly involved in the project. Note that the Estimated budget is only the initial grant request amount; to outline details on the various budget items, including those from other funding sources, go to the Budget tab."

The form fields are as follows:

- Project Name:
- Country:
- State:
- Zip Code:
- City:
- Description:
- Sponsoring Club:
- Contact:
- Estimated Budget:

There is an "Update" button below the form fields.

Below the form are two sections for listing partners:

### Local Club Partners

List any partnering clubs within the District. Note that only one grant application needs to be made by the main sponsoring club.

Club	Contact Name	Contribution	Actions
No club specified			

[Add Club](#)

### Other Partners

List any cooperating organizations, clubs outside the district, or other partners that are participating in this project.

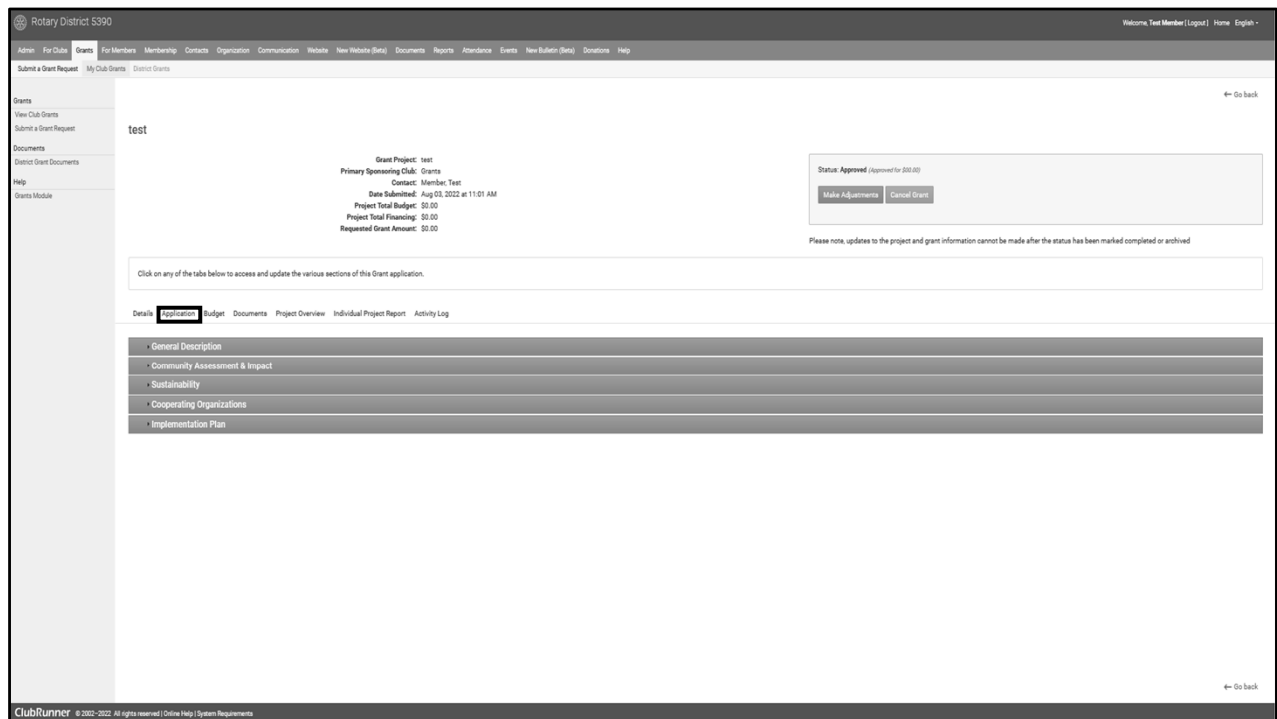
Club	Contact Name	Contribution	Actions
No club specified			

[Add Partner](#)

## Details Tab

Displays the information provided in the request.

If you are in partnership with other clubs or other entities you enter that information in this area.



## APPLICATION TAB

Opens sub-tabs













Rotary District S390

Welcome, Test Member [Logout] Home English

Admin For Clubs **Grants** For Members Membership Contacts Organization Communication Website New Website (Beta) Documents Reports Attendance Events New Bulletin (Beta) Donations Help

Submit a Grant Request My Club Grants District Grants

Grants  
View Club Grants  
Submit a Grant Request

Documents  
District Grant Documents

Help  
Grants Module

test

Grant Project: test  
Primary Sponsoring Club: Grants  
Contact: Member, Test  
Date Submitted: Aug 03, 2022 at 11:01 AM  
Project Total Budget: \$0.00  
Project Total Financing: \$2,000.00  
Requested Grant Amount: \$1,000.00

Status: Approved (Approved for \$0.00)  
Make Adjustments Cancel Grant

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived.

Click on any of the tabs below to access and update the various sections of this Grant application.

Details Application **Budget** Documents Project Overview Individual Project Report Activity Log

Expected Expenses

List all anticipated expenses for this project, including those that will be funded outside of the District grant portion.

Add A Budget Item

Description	Supplier	Local Amount	Currency	Tax	Total	Amount	Actions
Purchase of Kitchen Equipment	Frieds	\$1,000.00	USD	\$0.00	\$1,000.00	\$1,000.00	-
					Total:	\$1,000.00	

Expected Income

List all anticipated income for this project, including funds that will be contributed by the club, other partners and the District grant portion.

Add Expected Income

Description	Funding Source	Amount	%	Actions
Matching funds	Club/Other	\$1,000.00	50.00 %	-
District Grant	District Grant	\$1,000.00	50.00 %	-
		Total:	\$2,000.00	100.00 %

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## BUDGET

## EXPECTED EXPENSES

Enter the expenses incurred to complete the project.  
Break out significant items.

## EXPECTED INCOME

Describe each funding source.

\* You will be asked to classify if District / Club or other funding.

Rotary District S390

Welcome, Test Member (Logout) Home English

Admin For Clubs Grants For Members Membership Contacts Organization Communication Website New Website (Beta) Documents Reports Attendance Events New Bulletin (Beta) Donations Help

Submit a Grant Request My Club Grants District Grants

Grants

View Club Grants

Submit a Grant Request

Documents

District Grant Documents

Help

Grants Module

Document 'mou' was uploaded successfully.

test

Grant Project: test  
Primary Sponsoring Club: Grants  
Contact: Member, Test  
Date Submitted: Aug 03, 2022 at 11:01 AM  
Project Total Budget: \$0.00  
Project Total Financing: \$2,000.00  
Requested Grant Amount: \$1,000.00

Status: Approved (Approved for 200.00)

Make Adjustments Cancel Grant

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived.

Click on any of the tabs below to access and update the various sections of this Grant application.

Details Application Budget Documents Project Overview Individual Project Report Activity Log

Project Documents

Attach all related documents and files.

Search Go

Documents and folders are organized alphabetically. Drag and drop documents and folders to move them from one folder to another or to change the parent folder.

Collapses All Expand All

	Updated On	Updated By	Actions
<div> <div></div> <div>photo</div> </div> <div>Collapses All Expand All</div>	Aug 03, 2022	Test Member	<a href="#">Edit</a>   <a href="#">Get Link</a>   <a href="#">Delete</a>

Go back

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## DOCUMENTS

Upload at least the Club Financial MOU.

Upload any other documents the Club wishes to preserve relative to the project.  
e.g. pictures, letters, etc.



Grant Project: test  
 Primary Sponsoring Club: Grants  
 Contact: Member Test  
 Date Submitted: Aug 03, 2022 at 11:01 AM  
 Project Total Budget: \$0.00  
 Project Total Financing: \$1,000.00  
 Requested Grant Amount: \$1,000.00

Status: Approved (Approved for \$00.00)  
 Make Adjustments Funded Report Cancel Grant

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived

Click on any of the tabs below to access and update the various sections of this Grant application.

Details Application Budget Documents Project Overview **Individual Project Report** Activity Log

Print Submit

**Project Description**  
 project description goes here

1. Describe the project. What was done, when, and where did the 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 this project?

Update

**Financial Report**  
 All sources of income. Add income items as needed.

Add Income Item

Date	Description	Funding Source	Amount	%	Actions
Aug 03, 2022	Matching Funds	Club/Other	-\$1,000.00	100.00 %	
		Total	\$1,000.00	100.00 %	

All expense items. Please be specific and add lines as needed.

Add Expense Item

## INDIVIDUAL PROGRESS REPORT

This becomes the final report.

Answer each question BRIEFLY.

Next slide highlights each question.



# Individual Project Report

1. Describe the project. What was done, when, and where did the 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 this 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?



BRIEFLY ANSWER EACH QUESTION. EMPHASIS ON BRIEFLY!

Rotary District S390

Welcome, Michael Mayert [Logout] Home English

Admin For Clubs Grants For Members Membership Contacts Organization Communication Website New Website (Beta) Documents Reports Attendance Events New Bulletin (Beta) Donations Help

Submit a Grant Request My Club Grants District Grants

Grants

Grants Dashboard

View All Grants

Qualified Clubs

Submit a Grant Request

Reports

Financial Summary

District Grants Cash Flow

Documents

District Grant Documents

Settings & Customization

Edit Notifications

Message Templates

Settings

Help

Grants Module

test

Grant Project: test

Primary Sponsoring Club: Grants

Contact: Member: Test

Date Submitted: Aug 03, 2022 at 11:01 AM

Project Total Budget: \$0.00

Project Total Financing: \$2,000.00

Requested Grant Amount: \$1,000.00

Status Funded

Completed Approved Cancel Grant

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived

Click on any of the tabs below to access and update the various sections of this Grant application.

Details Application Budget Documents Project Overview Individual Project Report Activity Log

This is a General description of the Grant project. Outline in detail the humanitarian need your project will address, the intent of the project, how the project will be implemented, and how Rotarians will be directly involved in the project. Note that the Estimated budget is only the initial grant request amount; to outline details on the various budget items, including those from other funding sources, go to the Budget tab.

Project Name: test

Country: United States of America

State: Montana

Zip Code: 59000

City: Anywhere

Description: This is a test for training

Sponsoring Club: Grants

Contact: Member: Test

Estimated Budget: \$0.00

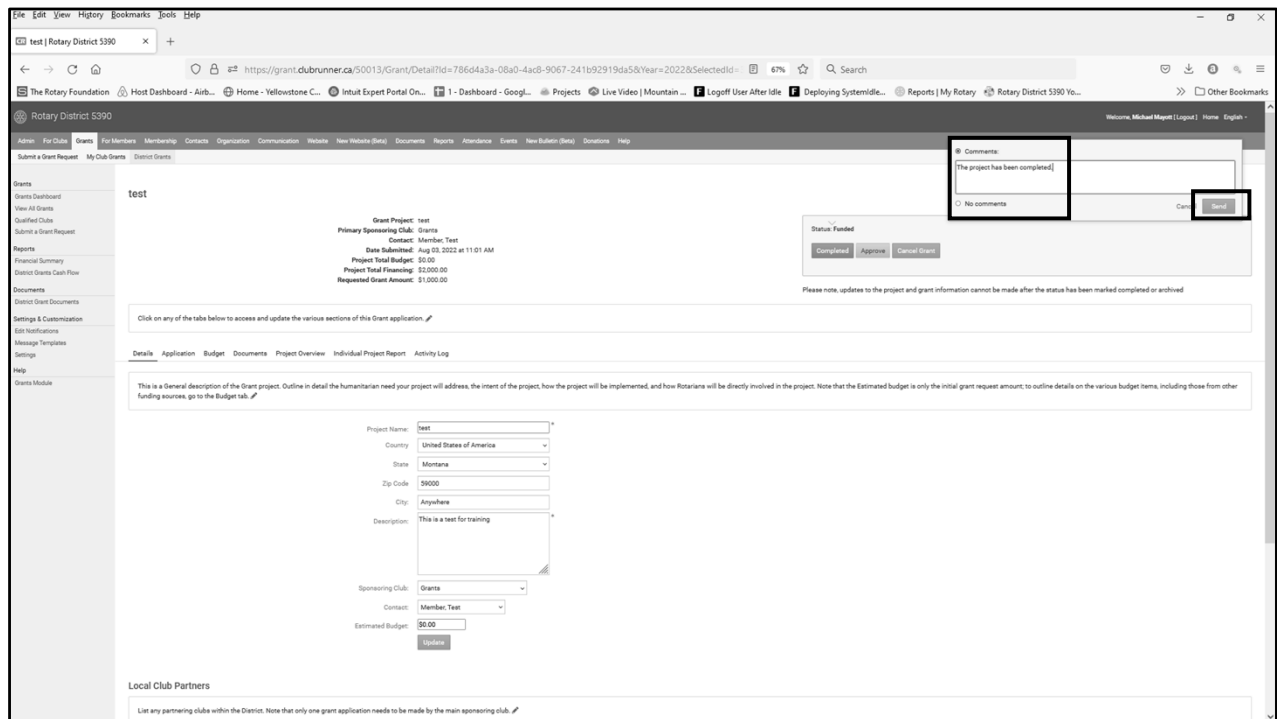
Update

Local Club Partners

List any partnering clubs within the District. Note that only one grant application needs to be made by the main sponsoring club.

## SUBMITTING YOUR REPORT

Select the COMPLETED “Blue” button.



Dialog window opens allowing for any notes to the Grants committee.

Select SEND when done.

Rotary District S390

Welcome, Test Member [Logout] Home English

AdminFor ClubsGrantsFor MembersMembershipContactsOrganizationCommunicationWebsiteNew Website (Beta)DocumentsReportsAttendanceEventsNew Bulletin (Beta)DonationsHelp

← Go back

test

Grant Project: test

Primary Sponsoring Club: Grants

Contact: Member: Test

Date Submitted: Aug 03, 2022 at 11:01 AM

Project Total Budget: \$0.00

Project Total Financing: \$2,000.00

Requested Grant Amount: \$1,000.00

Status: Completed (The project has been completed)

Cancel Grant

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived

Click on any of the tabs below to access and update the various sections of this Grant application.

DetailsApplicationBudgetDocumentsProject OverviewIndividual Project ReportActivity Log

This is a General description of the Grant project. Outline in detail the humanitarian need your project will address, the intent of the project, how the project will be implemented, and how Rotarians will be directly involved in the project. Note that the Estimated budget is only the initial grant request amount; to outline details on the various budget items, including those from other funding sources, go to the Budget tab.

Project Name: test

Country: United States of America

State/Province: MT

Zip/Postal Code: 59000

City: Anywhere

Description: This is a test for training

Sponsoring Club: Grants

Contact: Member: Test

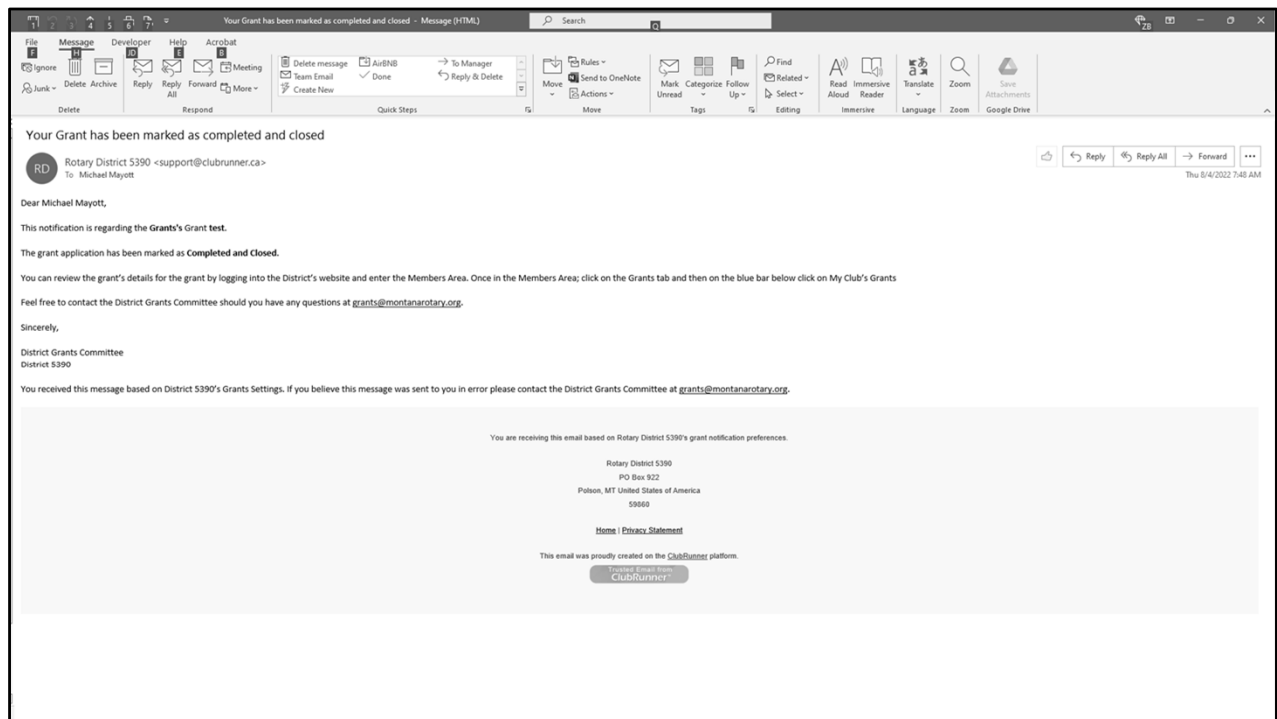
Estimated Budget: \$0.00

Local Club Partners

List any partnering clubs within the District. Note that only one grant application needs to be made by the main sponsoring club.

Club	Contact Name	Contribution	Actions
No club specified			

Other Partners



An email will be sent notifying you the project has been closed.

?

