



District 5190

Grants Management Training

Preparing for the 2025-26 Rotary Year

Bob Withers – District Grants Chair

grassstains@cccomm.net 775-225-0744

Roberta “Berta” Pickett – DRFCC

bertad5190@gmail.com 916-765-8071

District Grant Qualification for 2025-26

DOING GOOD IN THE WORLD USING ROTARY FOUNDATION GRANTS

Objectives for today:

- Get your club qualified to apply for a grant
- Provide you resources about our Foundation and about District Grants
- Get you started on your District Grant Application



- Rotaract
- Join Rotary
- Contact Us
- My 5190 - Member Resources
- District Conference 2024

Rotary is:

A group of local business professionals, civic leaders, and other community members that meet on a regular basis to create a better community.



District 5190
California / Nevada

Rotary
District 5190

District 5190

California / Nevada

THE ROTARY FOUNDATION (TRF)

The Rotary Foundation is YOUR Foundation!

However, The Rotary Foundation (TRF) is NOT the same as Rotary International (RI)

Rotary International (RI)	+	The Rotary Foundation (TRF)
EST 1905		EST 1917
Led by RI President		Led by Chair of Trustees
501 c(4) - Board of Directors		501 c(3) - Board of Trustees
Charters clubs		Raises Funds for Programs
Promotes Membership		Manages Funds
Admin/Sets Policies		Sets Terms & Conditions of Grants
Collects Dues		Collects donations

Together, We Are Rotary

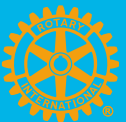
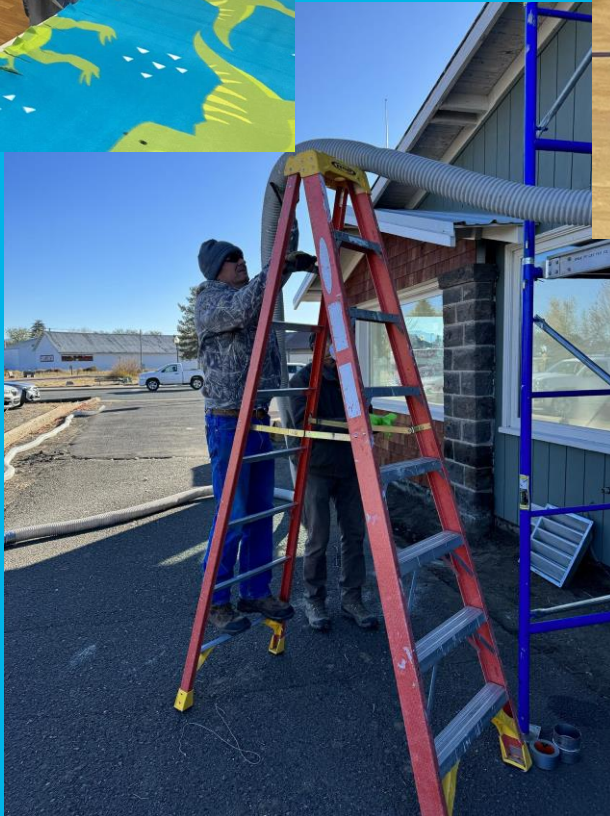
**Together, we see a world where
people unite and take action to
create lasting change – across
the globe, in our communities,
and in ourselves.**

ROTARY HAS FOUR STRATEGIC PRIORITIES: The ROTARY ACTION PLAN



THE ROTARY FOUNDATION HELPS US INCREASE
IMPACT, EXPAND OUR REACH, ENGAGE MORE
PEOPLE, AND ADAPT TO A CHANGING WORLD

ENGAGED MEMBERS > MORE GIVING > MORE GRANTS > VIBRANT CLUBS



We Are
People of Action

TYPES OF GRANTS

TRF MISSION: The Rotary Foundation helps Rotary members to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty.

GRANTS ARE
THE VEHICLE

TYPES OF GRANTS

DISTRICT GRANTS

- Smaller Grants
- Single or Multi-Club
- Single Year: Project must be Completed by May 31, 2026
- Reporting must be Completed by June 30, 2026
- Local or International



GLOBAL GRANTS

- Large, long-term projects
 - Minimum \$30K
 - High impact and sustainable outcomes
 - Usually multi-year projects
 - 2 Countries – International
 - Community Needs Assessment
 - Separate RI Training
 - Club sponsor's primary responsibility
- opened



more Areas of Focus

able outcomes

l reporting

t Partner

er required

ified when grant is

**Contact the Grants Committee if your club
is interested in a Global Grant**

OTHER TYPES OF FOUNDATION GRANTS

District Disaster
Response Grants
(District Applies for it)



Global Grant
Scholarships
& Peace
Fellowships



Programs of Scale Grants



GRANT FUNDING

WHERE DO GRANT FUNDS COME FROM?

If Grants
are the
vehicle;

Then Giving
is the
engine!

Annual SHARE
Fund

Endowment Fund

3 – Year SHARE
Gifts come in Y1, Y2
and Y3

Year 4:
Y1 Gifts released to
Projects

Earnings go to
Projects

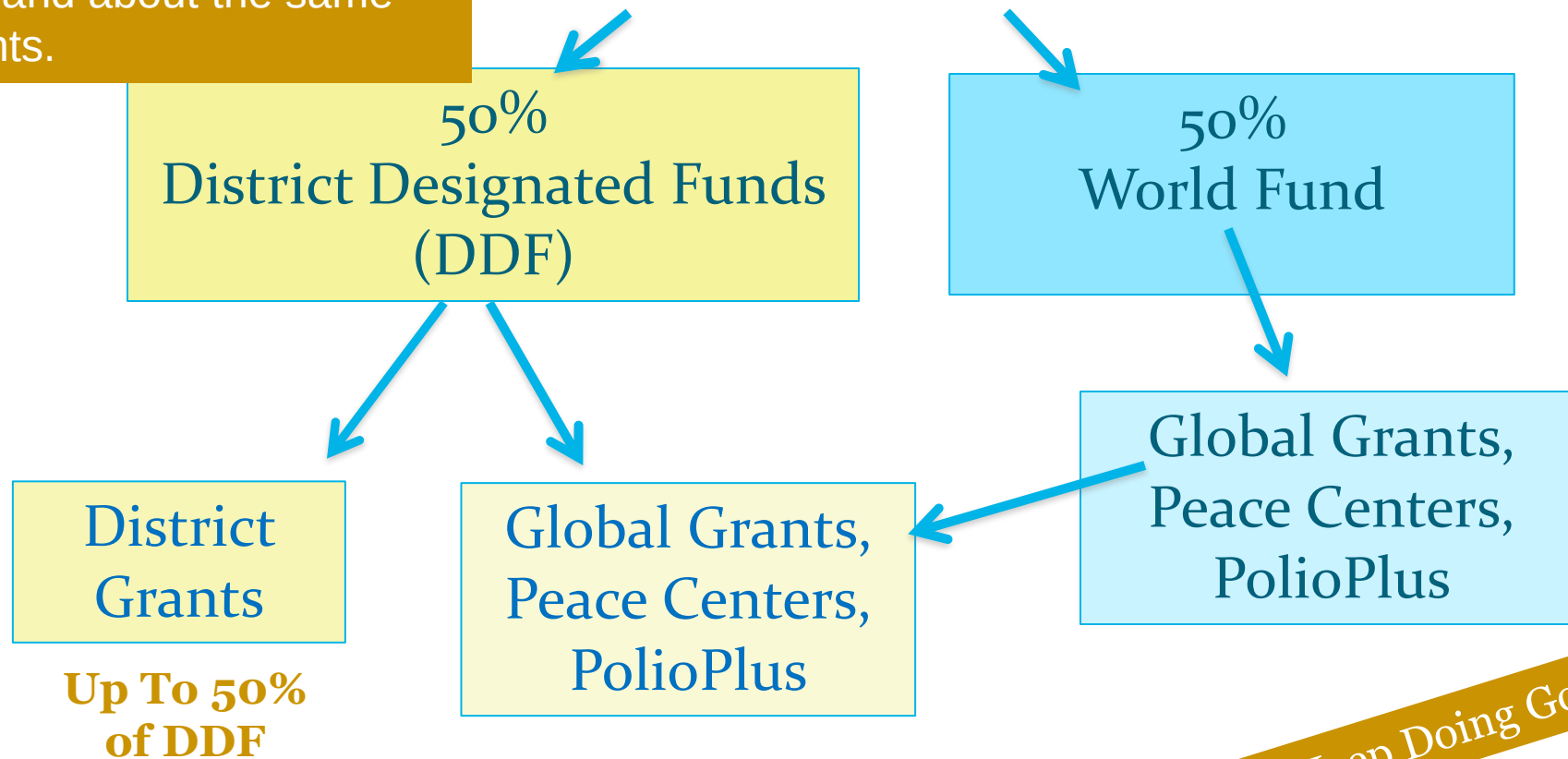
Interest Income helps
pay Operating costs

Annual Fund - SHARE

Contributions in 2022-23 were \$4651k. For 2025-6, We expect about \$154K will be available for district grants and about the same for global grants.

Contributions
from 2022-23

(Less 5% for Operating Expenses)



We Keep Doing Good in the World

RECAP – 1st poll

CLUB QUALIFICATION

CLUB QUALIFICATION

- Only District training is required for District Grants
- **Today's Grant Management Training (GMT) is good for 36 months**
- 3rd year of qualification must be for the full Rotary year
- **Club President must be trained on GMT and sign Memorandum of Understanding (MOU)**
- PE must be trained and sign MOU OR another trained member must sign



CLUB MEMORANDUM OF UNDERSTANDING (MOU)

An agreement between the Club and District, required by TRF, that acknowledges that the Club will undertake the proper implementation of grant activities and proper management of Foundation grant funds.

An Important Legal Document:

**Be sure to read it prior to signing.
Understand all 7 sections.**



CLUB MEMORANDUM OF UNDERSTANDING AND ADDENDUM

CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING

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### THE ROTARY FOUNDATION

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds



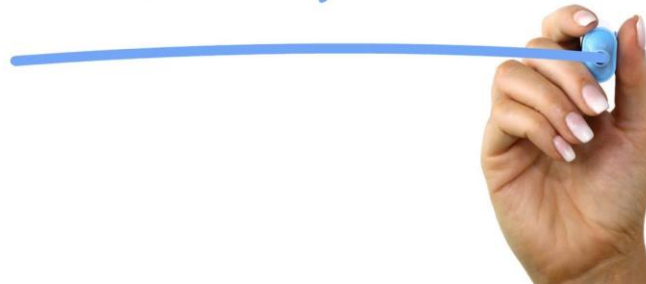


# CLUB MEMORANDUM OF UNDERSTANDING

- **Club Officer Responsibilities**

- Implement, manage, and maintain club qualification
- Ensure proper stewardship
- Ensure no actual or perceived conflict of interest
- Ensure payments are made from an invoice, purchase order or reimbursement from a paid invoice

MANAGEMENT



# CLUB MEMORANDUM OF UNDERSTANDING

- **Financial Management**

- Standard set of accounts with detailed ledger
- Disburse grant funds as appropriate
- Use checks, credit or debit cards
- Maintain segregation of duties
- Establish an inventory system



# CLUB MEMORANDUM OF UNDERSTANDING

- **Bank Account Requirements**
  - Separate accounting; separate accounts *recommended*
  - If separate, then account name should identify grant
  - Have 2 Rotarians signatories
  - Be non-interest bearing (or low)
  - Plan for transfer of custody if signatories change



# CLUB MEMORANDUM OF UNDERSTANDING

- **Report on Use of Grant Funds**
  - Complete
  - Accurate
  - On Time





# CLUB MEMORANDUM OF UNDERSTANDING

- **Document Retention**

- Provide access to documents for transparency
- Make copies – hardcopy and online copies – cloud storage
- Retain for a minimum of five years or longer if local law requires
- *What should you keep?*

## ***What to Keep?***

- All grant correspondence
- Receipts, cancelled checks, bank statements
- MOUs
- Vendor documentation
- Inventory
- Photos of project

# CLUB MEMORANDUM OF UNDERSTANDING

- **Reporting Misuse of Grant Funds**

The club must report any potential and real misuse or mismanagement of grant funds to the District's Stewardship Chair:

**Reid Riker for 2025-26 reidrotary5190@gmail.com**

# REPAYMENT OF FUNDS

If there is a problem and grant funds must be repaid:

- **For District grants, the club is responsible. For multi-club grants, all partner clubs are responsible regardless of which club received the grant funds.**
- For Global grants, both sponsor clubs are responsible regardless of which club received the grant funds.

# MOU and ADDENDUM

- **Authorization and Agreement**
  - Clubs must be qualified in order to participate in District and/or Global Grants
  - 2025-26 Club President and President Elect or one other member sign the MOU and are current on GMT
  - Must be a Club in “Good Standing”



# TO BE APPROVED, BE A CLUB IN GOOD STANDING

## What is a Club in Good Standing?

- All financial obligations to RI and D5190 are paid
- Club is current on filing tax returns
- Annual Fund goal is entered in Rotary Club Central on the RI Website (MyRotary.org)
- Club website and social media pages have current Rotary logo and proper branding
- There are no overdue reports on any open grant

# CLUB QUALIFICATION

- Read the MOU and Addendum carefully
- Share with your Board
- “Wet” Signatures
- Scan/Email to Roberta Pickett

**For District Grants, the President must be current on GMT training and sign. The President Elect must be current on GMT training and sign OR an additional trained member is required to sign.**

**For Global Grants, same as above PLUS President Elect must sign MOU (whether or not trained) and one Club member must take RI Grant Management Seminar or Recertification in the current year and each year GG is open.**

| Additional Trained Member |         |
|---------------------------|---------|
| Term                      | 2025-26 |
| Name                      |         |
| Signature                 |         |
| Date                      |         |

## Authorization and Agreement

*This memorandum of understanding is an agreement between the club and the district and acknowledges that the club will undertake measures to ensure the proper implementation of grant activities and proper management of Foundation grant funds. By authorizing this document, the club agrees to comply with all of the conditions and requirements of the MOU.*

*On behalf of the Rotary Club of \_\_\_\_\_ the undersigned agree to comply with all of the conditions and requirements of the MOU for Rotary year 2025-26, including the attached D5190 Addendum, and will notify Rotary International District 5190 of any changes or revisions to club policies and procedures related to these requirements.*

| Club President |         |
|----------------|---------|
| Term           | 2025-26 |
| Name           |         |
| Signature      |         |
| Date           |         |

| Club President-Elect |         |
|----------------------|---------|
| Term                 | 2025-26 |
| Name                 |         |
| Signature            |         |
| Date                 |         |

# RECAP – Poll #2

B R E A K – 10 min

# GRANT ESSENTIALS



## What Comes BEFORE the Grant ...

Just like learning about the differences between RI and TRF, learning some basics about Rotary itself is really important.

<https://learn.rotary.org/members/pages/36/course-catalogs>

Rotary Foundation Basics  
Our Logo: Representing Rotary  
The Rotary Brand

Not **REQUIRED**, but definitely  
**RECOMMENDED!**

# CLUB'S GRANT PLAN

- Club's Grants Plans will be due May 31, 2025
- We totaled all the submitted plans to develop our Block Grant request
- The Block Grant will be submitted to TRF for approval
- Funds will be wired to the District, sometime after 7/1
- This was NOT your grant application



**NOTE: THIS IS NOT YOUR GRANT APPLICATION.** Your grant application will come later.

Please complete this form based on your Club's Preliminary Plan for District Grants during 2025-26 and submit by May 31, 2025 to the DRFCC Berta Pickett at [BertaD5190@gmail.com](mailto:BertaD5190@gmail.com). Your plans and a brief description are needed in order for the District to apply for the District Block Grant that will provide the funds for your District Grants.

If your Club is not intending to seek a District Grant for the coming year, please check this box ☐ sign and date below, and submit.

**DISTRICT GRANTS:** If your Club does plan to apply for a District Grant, please complete the following:

| Project Type                             | Club Funds | District 1:1 Match (Single Club Project)   | Add your Club's Bonus<br>DDF here? Is so, mark X |
|------------------------------------------|------------|--------------------------------------------|--------------------------------------------------|
|                                          |            | District 1:1.33 Match (Multi Club Project) |                                                  |
| District Grant Single Club Project       | \$         | \$                                         | <input type="checkbox"/>                         |
| District Grant Multi Club Project        | \$         | \$                                         | <input type="checkbox"/>                         |
| Community Needs Assessment               | \$         | \$                                         | <input type="checkbox"/>                         |
| Stand-Alone Bonus Funds Project .....    |            |                                            | <input type="checkbox"/>                         |
| TOTAL District Matching Funds Requesting |            | \$                                         | (Max \$2500 single or \$3325 multi-club)         |

Clubs may receive total District Grant matching funds up to \$2500 per Club or \$3325 per Club, if engaged in a multi-club project, PLUS your Club's Bonus Allocation (if applicable), used in any combination of projects, or community assessment. Please provide a brief description of each project you are planning. **This is NOT your application – that will come later.**

**District Grant - Single Club Project:** Please provide a brief description (2-3 sentences) of the project.

**District Grant - Multi-Club Project:** Please provide a brief project description, who is lead club/who are partner clubs

**District Grant Stand-Alone Project using only Bonus DDF Allocation:** Please provide a brief description.

**Community Needs Assessment for planning a Global Grant:** Please describe your plans/concept.

**Project Fair: CONTINUATION OF PILOT PROGRAM to support Project Fair participation:** If your Club plans to apply for a District Grant for Project Fair Attendance, please complete the following. This is a Project Fair Scholarship Grant to assist in offsetting travel costs to a Project Fair, with a maximum of \$1500. It falls outside of the normal maximum matching, plus no club match is required. **NOTE: only one scholarship per club will be awarded, every 3 years.**

Project Fair Attendance \$\_\_\_\_\_ (Up to Max \$1500) Use bonus? ☐

Please identify which Project Fair you plan to attend.

Club Name

President 2025-2026 - Signature

Date

Submit this completed and signed form to District Rotary Foundation Committee Chair (DRFCC) Berta Pickett by email at [BertaD5190@gmail.com](mailto:BertaD5190@gmail.com), no later than May 31, 2025. Thank you!

# THE DISTRICT USES YOUR PLANS TO APPLY FOR A DISTRICT BLOCK GRANT

Our 2023-24 district block grant was \$116K

Our 2024-25 district grant amount was \$93K

Our 2025-26 district block grant will be about \$154K

THE ROTARY FOUNDATION  
(2023-24)  
District 5190

GRANT NUMBER  
DG2451762

STATUS  
Approved

## Spending Plan

2023-24 maximum district grant amount  
116,613 USD

## Spending plan activities

| # | District or club                                             | Activity or project category                                                                                                                                                                                                                                                 | Location                          | Total amount (USD) |
|---|--------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|--------------------|
| 1 | Tahoe-Incline                                                | Education                                                                                                                                                                                                                                                                    | United States                     | 6,650              |
|   | Activity or project type<br>Scholarship<br>primary/secondary | Brief description<br>Provide a program in concert with the Boys and Girls Club to motivate middle school children with incentives to excel in school and perform homework consistently. Tahoe Incline RC will be the lead club and Incline Village RC will also participate. | Primary beneficiary<br>Student(s) |                    |
| 2 | Sparks                                                       | Education                                                                                                                                                                                                                                                                    | United States                     | 3,250              |
|   | Activity or project type<br>School<br>supplies/equipment     | Brief description<br>Purchase and distribution of twelve sets of textbooks and personal protective equipment to enable the launch of a welding program at ACE High School, a charter school in Reno focusing on trade career readiness.                                      | Primary beneficiary<br>Student(s) |                    |

# WHAT FUNDING IS AVAILABLE FOR 2025-26

## ■ MATCHING DISTRICT FUNDS

- Single Club projects: District matches club contributions 1:1 up to \$2500
- Multi-Club (clubs within D5190) projects: District matches club contributions 1:1.33 up to \$3325
- Total matching dollars per club is \$2500 OR \$3325



First come; first served



# ADDITIONAL FUNDS: BONUS GRANT FUNDS FOR 2025-26

- **Bonus Funds (extra \$\$)** recognize clubs with an outstanding history of giving in the prior year to the TRF Annual Fund
- Clubs qualify for Bonus Funds if they achieve the **100% EREY Banner** in 2024-25. Deadline to qualify for 2025-26 is June 30, 2025
  - \$750 for a single-club grant
  - \$1000 for a multi-club grant with no match required from club
- Bonus Funds can be *added* to a District Grant or may be used for a *stand-alone* project.
- You must add these funds into your grant application budget.





# CONTINUED PILOT PROJECT for Project Fair Attendance for 2025-26:

- *This funding is in addition to a club's maximum matching total of \$2500 or \$3325*
  - To encourage participation in Project Fairs
  - To stimulate future participation in International and/or global grant projects
- Club can provide travel assistance up to \$1500 for one member to a Project Fair
- District has set aside a max of \$6000 (4 clubs@\$1500); first come first served
- Club is not required to match funding



# TOTAL DOLLARS AVAILABLE FOR 2025-26:

|                                 | CLUB CONTRIBUTION | 1:1 or 1:1.33 DISTRICT MATCH | EREY BONUS | PROJECT FAIR OPPORTUNITY | TOTAL <i>POSSIBLE</i> FUNDING |
|---------------------------------|-------------------|------------------------------|------------|--------------------------|-------------------------------|
| SINGLE CLUB PROJECT 1:1 MATCH   | \$2500            | Up to \$2500                 | \$750      | \$1500                   | \$4750 !!                     |
| MULTI-CLUB PROJECT 1:1.33 MATCH | \$2500            | Up to \$3325                 | \$1000     | \$1500                   | \$5825 !!                     |

# GUIDING PRINCIPLES FOR ALL GRANTS

- Projects must relate to TRF mission
- Active participation of Rotarians
- No spending prior to approval
- Implement the plan just as approved (Request changes)
- Ensure proper Stewardship
- Adhere to local laws
- Sensitivity to host area/community/culture
- Follow Privacy Requirements
- Include proper signage
- Proper use of Rotary Marks/Branding



# PROPER ROTARY MARKS/BRANDING

**NEW FOR 2025-26 : GRANT WILL NOT BE APPROVED UNTIL  
YOUR PROPOSED SIGNAGE IS  
SUBMITTED/REVIEWED/APPROVED**

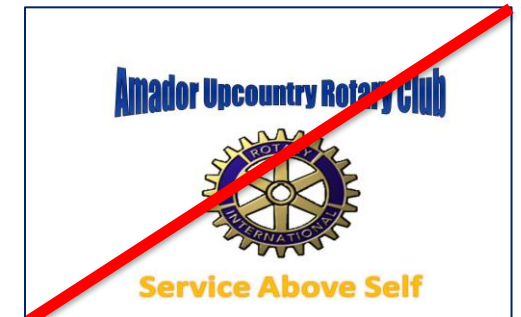
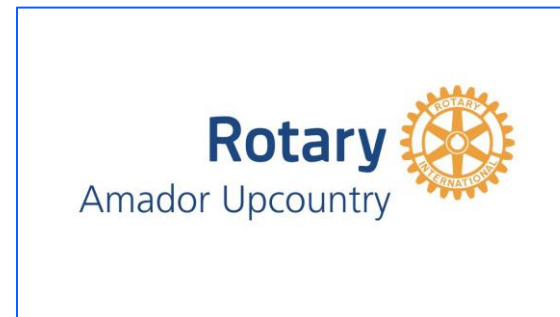
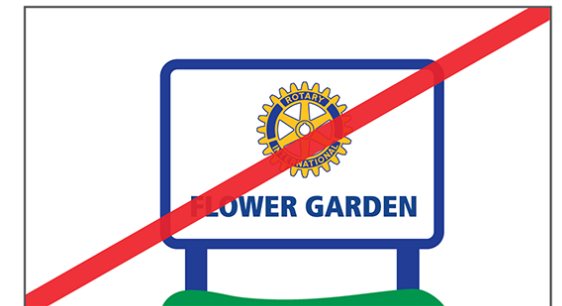
<https://brandcenter.rotary.org/> - learn  
about logos and signage; do's and don'ts

<https://learn.rotary.org/> - check out classes  
on Public Image

Contact the District Public Image  
Committee for assistance

Upload the design of your signage to the  
Documents tab of your application ASAP

## EXAMPLES OF Do's and DON'Ts



# STEWARDSHIP

- **Rotarian supervision**
- Responsible management and oversight
- Ensure proper use of funds
- Report any irregularities
- Timely submission of reports





# DISTRICT PROJECT BASICS

- Projects may be in your local community or international
- Recurring projects may only be repeated every three years
- Each year, you may fund phases of a project
- “Major expenses” require competitive bids
- Real or potential Conflicts of Interest must be addressed
- Proposed project signage must be uploaded to grant and be reviewed for proper branding



# WHAT DISTRICT GRANTS CAN NOT FUND

- No Continuous or excessive support of any one beneficiary
- No Purchase of land or buildings
- No Project signage >\$1000
- No Public Relations initiatives
- No Contribution to another TRF grant

# WHAT DISTRICT GRANTS CAN NOT FUND - Continued

- No Unrestricted cash donations to a beneficiary or cooperating organization
- No Activities for which the expense has already been incurred before grant is approved
- No Fundraising activities
- No Coverage of operating expenses of another organization

# WHAT CAN DISTRICT GRANTS FUND?

- Humanitarian, Educational Projects, or Training
- Support of some Rotary Youth Programs\*
- Renovation and Repair of Structures
- Infrastructure Construction
- Community Needs Assessment for a Global Grant
- Project Fairs – find out more at <https://my.rotary.org/en/exchange-ideas/project-fairs>



# CONFLICT OF INTEREST

- Exists when a Rotarian benefits financially or personally from a grant
- Benefit can be direct to a Rotarian or indirect to an associate of the Rotarian
- Any real or perceived conflict of interest must be addressed in writing





## CONFLICT OF INTEREST ?

*Your Club is planning a project that involves landscaping, including plants and hardscape elements. You conducted a competitive bidding process for the project. The best bid was submitted by a company owned by one of your Club members.*

Can this grant be funded? How to proceed?

# A GOOD DISTRICT GRANT?

- A. Purchasing the decorations and supplies for a fundraiser to support the local high school scholarship program
- B. Working with the Senior Citizens League to identify homes that need retrofitting for disabled access and then completing the work with Club members and other professionals.
- C. Donating \$4000 to the Food Bank to purchase needed items.
- D. Paying travel expenses for a club member to attend an in-person Project Fair to look for project partners.
- E. Helping upgrade the local middle school's computer lab by donating \$6000 to the school.

# PLANNING

- Form a 2-person+ Grant Committee
- Do Needs Assessment/Determine project
- Design Project
- Assign roles
- Set Goals
- Incorporate Public Image plan
- Create Budget
- Gather Competitive Bids





# COMMUNITY ASSESSMENT TOOLS

A resource for Rotary projects



## DISTRICT 5190 COMMUNITY NEEDS ASSESSMENT FOR PROJECTS AND DISTRICT GRANTS

Use this form to report your Community Needs Assessment by club or Area. Assessing strengths, weaknesses, needs and assets of the community is an essential first step in designing an effective, sustainable, impactful project. Refer to the Community Assessment Tools Manual for detailed information and helpful tips.

**BENEFICIARY – WHO WILL RECEIVE A CLEAR, DIRECT AND IMPACTFUL BENEFIT ?**

**WHO CONDUCTED THE ASSESSMENT?**

**WHEN WAS THE ASSESSMENT DONE?**

**WHAT METHODS DID YOU USE?**

**WHO FROM THE BENEFITING COMMUNITY PARTICIPATED IN THE ASSESSMENT?**

**LIST NEEDS YOU IDENTIFIED THAT YOUR PROJECT WOULD ADDRESS**

**LIST THE BENEFITING COMMUNITY'S ASSETS OR STRENGTHS**

# **APPLYING FOR A DISTRICT GRANT**





# The Starting Point – The Grant Application Page

Submit a Grant Request

My Club Grants

District Grants

Grant Documents

Grants

View Club Grants

Submit a Grant Request

Help

Grants Module

Explanations  
and  
directions;  
then scroll  
down

## Submit a Grant Request

### Submit a Grant Request

Please enter the basic information relating to your Grant Request below.

**Important note:** By entering data using "Submit a Grant Request," you are assuming the position of Primary Contact (member of Primary Club) and agree to the Grants Terms and Conditions, effective 30, 2025 for 2024-25 grants.

### 2024-25 POLICY AND REQUIREMENTS

In order to be Qualified to submit an application, a club must satisfy the following criteria:

1. Signed Memorandum of Understanding, including Addendum, on file for the year of the Grant Application
2. Club President and President Elect have attended Grant Management Training; If the President Elect has not attended GMT and/or has not signed the MOU, an additional

### POLICIES FOR ALL YEARS

In addition, for a Grant to be funded, Clubs must also meet the following criteria to be a "club in good standing":

1. Be current with reports on all Grants previously received
2. Be current with all Rotary and District dues and other financial obligations
3. Be in good standing on tax exempt status and other requirements of Federal and State taxing authorities and regulators
4. An Annual Fund goal has been set for the current year and entered into Rotary Club Central
5. Club website and social media are "brand compliant" using the current, approved Rotary logos from the Brand Center on <https://brandcenter.rotary.org/en-us/>

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 bud

**DO NOT use this form for a Global Grant.** Global Grants are submitted from the Grants Center on the MyRotary.org website but you must contact Grants Subcommittee first.

# The Starting Point – Initial Project Details, Only if Club is Qualified!

the remainder of the required information.

The description on this page is just a **brief summary** of your project. You will provide a complete description on the Application Tab. The Estimated Budget figure should be the total amount of the project including Club funds, District Grant matching funds and any third party funds.

Begin entry here

Project Details

Project Name:\* EXAMPLE - Bench and Water Fountain

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

Project Year:\* 2024-25

Sponsoring Club: Alturas  
Alturas  
Cameron Park  
Georgetown Divide  
Country: Loyalton  
Penn Valley  
State: Quincy CA  
Reno Centennial Sunset  
Zip Code: Sierra Passport  
Sparks  
City: Truckee  
Pioneer

Description:\*

OH NO! Why isn't my club listed?  
YOU ARE NOT QUALIFIED YET!

# Finish up all the Details - Ask Questions, Ask for Help if needed

Details Application Budget Documents Project Overview Individual Project Report Activity Log

This Description is a brief summary of the grant project. The estimated budget is the total budget including all funding sources. Use the Application and Budget tabs to provide a complete description of the project and budget.

Project Name:\* Pioneer Park Dog Park

Country United States of America

State/Province CA

Zip/Postal Code 95666

Scroll down each page –there are multiple items in each section

to provide a Dog Park within the boundaries of Pioneer Park, Pioneer, CA. SEE PROJECT DESCRIPTION DETAIL IN DOCUMENTS TAB. The Grant requires the installation of fencing (expense: \$5,507) for the Dog Park.

Contact: O'Leary, Andrew

Estimated Budget: \$15,875.00

## 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 |
|-------------------|--------------|--------------|
| No club specified |              |              |

## Other Partners

List any Cooperating Organizations and their contact information. State what role each such organization will play in the project.

Explanation: Cooperating Organizations are any other groups or organizations (other than partnering District 5190 Rotary clubs) that are working with the sponsoring club in either funding or implementing the project.



# After the first page details, go to Application and continue with each section

Scroll down each page –there are multiple items in each section

Details Application Budget Documents Project Overview Individual Project Report Activity Log

## General Description

This Tab has 5 parts. Please complete A, B, C, D, and E. Click the EDIT button to enter information.

- A. Describe the project, its location, objectives, the intended beneficiaries and how they will benefit when the project is completed.**
- B. In which of Rotary's Areas of Focus does the project fit?**
- C. State the Name, Email Address and Telephone Number of the Club's Primary Contact for this grant.**
- D. State the Club Mailing Address for receipt of approved grant funds.**
- E. Please upload, in the Documents area, confirmation of filing Club's latest required tax return with the IRS.**

PROJECT: Design, construct, and add amenities to provide a Dog Park within the boundaries of Pioneer Park, Pioneer, CA

This project has major interest in the area as the park is used informally by pets and their owners. Currently, the users utilize the public basketball and open areas of the basketball court and tennis court for their activity. The public has requested through past public hearings for a new Master Plan for the Agency, the development of a dog park in the UpCountry. The purpose of this grant is to provide a safe and single purpose facility for pet owners.

Area of Focus: Economic and Community Development

Primary Contact: Andrew O'Loan, President 2020/21, Rotary Club of Amador Upcountry  
andyoloan@aol.com  
510-303-8922

RC of Amador Up Country P.O. Box 656 Pine Grove CA 95665

Community Assessment & Impact

Sustainability

Cooperating Organizations

Implementation Plan



# The Budget – Expected sources of Income and Estimated Expenses

As you complete each section be sure to click the Orange "Update" button.

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

## Expected Expenses

List all anticipated expenses for this project. This includes expenses to be paid for by the Rotary Club and other partners, as well as from the District Grant. Additional supporting documentation for expenses may be requested.

Since major expenses require competitive bids which may not have been obtained at the time the grant is being written, it is OK to indicate that the Supplier is a "local vendor" or "Per competitive bidding" or left blank. If left blank, please upload a brief explanation in the Documents section as to when and how competitive bids will be obtained. The least expensive bid may not necessarily be the bid chosen; consider also quality of the product, delivery timeline, availability, local supplier vs. national chain.

| Description | Supplier             | Local Amount | Currency | Tax    | Total         | Amount            |
|-------------|----------------------|--------------|----------|--------|---------------|-------------------|
| Fencing     | Amador Fence Company | \$5,507.00   | USD      | \$0.00 | \$5,507.00    | \$5,507.00        |
|             |                      |              |          |        | <b>Total:</b> | <b>\$5,507.00</b> |

## 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. Please be sure to enter each funding source SEPARATELY using the "Add Project Financing" button.

For each entry the next screen requires a description and a dollar amount for the funding source and you must also click on the button indicating whether the funding is from "District Grant" added as a separate Expected Income line item. Bonus Funds do not require any matching club funds. Please note Bonus Funds are listed as a "District Grant."

For multi-club grants, please list each club's contribution, each club's District Grant match, and each club's Bonus Grant funds on separate lines.

| Description                                       | Funding Source | Amount            | %               |
|---------------------------------------------------|----------------|-------------------|-----------------|
| Rotary Club of Amador Upcountry Club Contribution | Club/Other     | \$3,264.93        | 59.287%         |
| Standalone Bonus DDF Bonus                        | District Grant | \$242.07          | 4.396%          |
| Rotary Matching Grant                             | District Grant | \$2,000.00        | 36.317%         |
| <b>Total:</b>                                     |                | <b>\$5,507.00</b> | <b>100.000%</b> |

**NOTE: List your Club contribution, grant \$, plus any bonus, and any other clubs' or organizations' contributions**

[← Go back](#)

# Documents – Upload ALL Documentation, Including Signage Design

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

## Project Documents

Upload all related documents and files including:

- + The Club President's signature
- + The Beneficiary acceptance signature
- + The club's most recent tax return
- + Proposed signage, logos, etc. for review and approval or a statement that graphics will be uploaded at a later time for review and approval.
- + Actual competitive bids for major expense items or a statement that competitive bids will be solicited prior to purchase of major expense items
- + If any actual or potential Conflicts of Interest (in which a Rotarian or relative might be seen as financially benefiting from the project) arise, upload a statement as to how the conflict will be mitigated.

As the project progresses, upload:

- + Receipts, copies of invoices, purchase orders, etc. along with matching proof of payments such as copies of cancelled checks, credit card charge slips, etc. Use letters or numbers to label the expenditure and the matching payment for ease of reference.
- + Graphics for any logos or signs using proper Rotary Branding (not already uploaded) that will be used to identify the project so that they may be reviewed and approved by the District Public Image Committee.
- + Pictures as the project progresses.

Name each document in a way that describes the general contents.

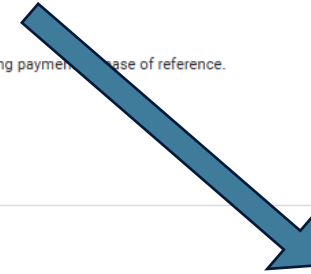
Search  Go

Documents and folders are sequenced alphabetically. Your access level does not allow you to modify documents.

| Name                                           | Updated On ▼  | Updated By ▼       | Actions                  |
|------------------------------------------------|---------------|--------------------|--------------------------|
| ▼ Check copies                                 | Jun. 21, 2023 | PDG Berta Pickett  |                          |
| 📎 Ck from RCAU to PGCIC                        | Jun. 27, 2023 | PDG Berta Pickett  | <a href="#">Get Link</a> |
| 📎 Cks from Rotary Grant Acct                   | Jun. 27, 2023 | PDG Berta Pickett  | <a href="#">Get Link</a> |
| 📎 Cks from Rotary General Acct                 | Jun. 27, 2023 | PDG Berta Pickett  | <a href="#">Get Link</a> |
| 📎 PGCIC ck 4491                                | Jun. 27, 2023 | PDG Berta Pickett  | <a href="#">Get Link</a> |
| 📎 PGCIC ck 4496                                | Jun. 27, 2023 | PDG Berta Pickett  | <a href="#">Get Link</a> |
| ▼ INVOICES                                     | Dec. 06, 2022 | IPDG Berta Pickett |                          |
| 📎 AC Project Receipts                          | Jun. 21, 2023 | PDG Berta Pickett  | <a href="#">Get Link</a> |
| 📎 Bank accounting and summary                  | Jun. 27, 2023 | PDG Berta Pickett  | <a href="#">Get Link</a> |
| 📎 Reimbursement to PGCIC                       | Jun. 21, 2023 | PDG Berta Pickett  | <a href="#">Get Link</a> |
| ▼ Pictures                                     | Jun. 27, 2023 | PDG Berta Pickett  |                          |
| 📎 Pic of installed air conditioner - Town Hall | Jun. 27, 2023 | PDG Berta Pickett  | <a href="#">Get Link</a> |

[Download All](#)

Add here copies of bids, invoices, checks, pictures of project, etc



# After You Implement Your Project

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

## Project Description

This is a **FINAL REPORT**.

I. Provide the information below when all funds have been spent.

II. Upload "Paid in Full" Receipts, canceled checks and photos under the Documents Tab. If you prepare your entire report using Word and answer all of the

III. Complete the Financial Report below to reflect your actual income and expenses. If expenses are less than twice the amount of the grant you will have to repay the difference. Contact the Grants Subcommittee chair in that event.

IV. Upload at least one high quality photo that depicts your project

When you have finished the Report click "Update" below to save the report.

After you have clicked on "Update," click on the "Submit" button above on the right to send an email advising the Grants Subcommittee that you have submitted the final report.

1. Describe the project. What was done, when, and where did the project activities take place?

Rotary created a much-needed dog park in Pioneer Park in Pioneer, CA. We collaborated with Amador County Supervisor Jeff Brown and the Amador County Recreation Association (ACRA). The project began in February 2020 and was completed

-Gaining approval from the Bureau of Land Management and Amador County (who leases/runs Pioneer Park)

-Developed plans, measurements, etc. to design the Park

-Acquired sizeable donations from the county and Jackson Rancheria Band of Miwuk Indians

-Secured a fence company to install the fences and gates.

-Utilized, free of charge, the Pine Grove Conservation Camp run by Cal Fire to clear heavy brush that covered the ground

-Secured a Rotary spouse to use a tractor for multiple days to clear the ground free of charge

-ACRA sprayed the ground to prepare for ground cover.

-Rotary ordered park amenities to include park benches, tables, Dog park signs, trash receptacles, dog waste stations, etc.

-Acquired cedar wood chips for ground cover

-Rented equipment and plumbing supplies for digging water line and installing a water spicket; installed by Rotary volunteer free of charge

-Rotary project manager, ACRA, and Supervisor Brown, with his personal tractor, prepared wood chip piles using rented trucks on multiple work days

-On Rotary at Work Day, April 24, a team of club Rotary volunteer members, ACRA, and Supervisor Brown installed all park amenities, spread wood chips, and completed plumbing for water access.

2. How many people benefited from this project? There are over 10,000 residents in Upcountry Amador County (Pioneer, Pine Grove, and Volcano) that can utilize this dog park, where none existed in the area.

This is what you complete after implementation of your project:  
The Final Report that includes your *actual* income and expenses

# RECAP – Poll #3

# ONE PAGE SUMMARY OF WHAT YOU NEED TO DO

- ✓ Be a club in good standing
- ✓ President and at least one other club member take GMT
- ✓ Complete the Club's Plan for District Grants Form by 5/31/25
- ✓ Sign MOU by 6/30/25
- ✓ Do not spend any money until your grant is approved
- ✓ Send design of any signage to Grants team as part of application
- ✓ Save and upload copies of all bids, signage design, invoices, checks, cc and/or bank statements, explanations, and photos (etc) to the Documents section of the Grants Module on Clubrunner
- ✓ Complete Final Report no later than 6/30/26
- ✓ **Transform Lives with your amazing projects!**





# CREATE DISTRICT PROJECTS WITH IMPACT



Responsive to Real Needs

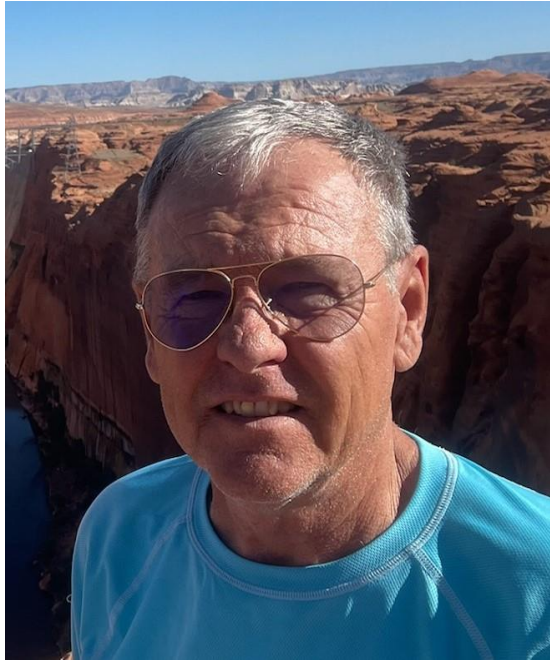
Are Sustainable

Have Measurable Outcomes

Partner to Leverage Resources

**Transform Lives!**

# Grants Management Team



Bob Withers – Grants Chair: E-Club D5190

Ramona Delmas: RC of Bishop Sunrise

Linda Hartman: RC of Nevada City 49er

Rich Perry: RC of Carson City

Stefanie Scoppettone: RC of Reno

David Zybert: RC of International Exchange





Thank you for attending today!  
Remember: We are here to support  
you as you go through the grant  
process. Just call.