

Rotary



District Grant

2018-19 Club Qualification Training



Topics

- General Overview
- Critical dates
- Login to DACdb
- Details tab
- Contacts tab
- Application tab
- Budget tab
- Documents tab
- Signatures
- Final Report tab

General Overview

DISTRICT GRANTS:

- Fund small scale, short term activities
- Address needs in your communities or communities abroad
- For International projects clubs are encouraged, but not required, to partner with a local/host club.

Clubs have a lot of freedom to customize their service projects. There aren't many restrictions, as long as your grant supports The Rotary Foundation (TRF) and meets the terms and conditions established by TRF for the use of grant funds and supports and complies with the District 6860 Policies and Procedures Supplement.

General Overview cont.

District Grants may be used to fund a variety of projects and activities including:

- **Humanitarian** projects-including service travel and disaster recovery efforts.
- **Scholarships**- any level, length of time, location, or area of study.
- **Vocational** training teams- groups of professionals who travel abroad to teach local professional about a particular field.

General Overview cont.

Prohibited Use of District Grant Funds, including:

- Purchase of land or buildings; EXCEPT grant funds can be use to renovate structures, and build low cost housing (e.g., Habitat Housing).
- Fund raising activities.
- Unrestricted cash donations to a beneficiary or cooperating organization.
- Activities for which the expense has already occurred.

General Overview cont.

Club Qualifications:

- District 6860 requires that clubs applying for grant funds be qualified.
- Clubs must be requalified each year due to leadership change over.
- Attend a District Club Qualification Training Seminar- primary audience for seminar training is the club president-elect, club Foundation chair, and club members who will be responsible for managing the Application process and coordinating the project and Final Report.
- Be current on all Rotary International (RI) and District 6860 dues.
- Clubs must be current on all Grant reporting requirements.

General Overview cont.

Club District Grant Applications for District Designated Funds (DDF) will be evaluated and recommended on the following:

- Project supports the mission of TRF.
- Adherence to the Terms and Conditions for TRF District Grants.
- Qualification of proposing clubs by District 6860.
- Impact of your project on the community.
- Per capita giving to the Annual Fund- Clubs must contribute to the Annual Fund of TRF as a requirement for applying and receiving district grant funds.
- Involvement of Rotarians, Rotaract and Interact members in the project.
- Proportion of Club funds that will be contributed to the project in relation to the amount of DDF requested.
- Promotion of Rotary locally.

General Overview cont.

Submitting the Application:

- District Grant Applications may be submitted by qualified clubs only.
- District Grant Applications are only made through the DACdb Grant module, no other form is accepted.
- Drop Dead District Grant submission deadline is 5:00 pm July 15, 2018.
- Maximum amount of (DDF) funding a club may request for 2018-19 is \$4,000.
- Clubs may submit multiple applications; total DDF requests for all applications not to exceed \$4,000 for 2018-19.
- Clubs may partner on the same project and apply up to their max DDF each to the project, \$4,000 + \$4,000. = \$8,000.

Critical Dates

- District Grant pre-planning: April 21 to June 30, 2018
- 2018-19 Applications due July 1- July 15, 2018, 5:00 pm
- No grant expenses may occur before TRF grant approval: between August – October 1, 2018
- 2018-19 Final Reports due 30 days after your Target Completion Date
- 2018-19 Project complete no later than May 15, 2019
- 2018-19 Final Report due no later than June 15, 2019

DACdb Now (Classic Interface)

ID | Logout
Welcome: St. Peter, Michael J. 6860-4

[Home](#) [CLUBS](#) [My CLUB](#) [My DATA](#) [Committees](#) [PMail](#) [Calendar](#) [NC](#) [Finance](#) [Reports](#) [Speakers](#) [Grants](#) [Club PAGES](#) [Files](#) [Forms](#) [ATTND](#) [Engage](#) [AREA](#) [Help](#)

[Usage and Privacy Policies](#) [View District NEWSLETTER](#) [View District COMMITTEES](#) [View District LEADERSHIP](#) [RI Theme](#)

District Conference, Beau Rivage, Let's Go!

Wednesday, May 2, 2018

By Carla Daily



If you haven't registered for District Conference (June 7th - 10th), then one must ask... Why not? *Do you even know how much fun it will be??* If you are waiting to register, then today is the day because after May 7th, the rates increase to \$349 plus a \$15 resort fee. Do it today (right now!) to guarantee the group weekend rate of \$199 plus a \$10 resort fee. If you still aren't sure, then look at this [Beautiful Beau Rivage Resort](#) (where we will be having fun without you). Find more information about this fun weekend when you [REGISTER NOW](#) (today!)

Alexander City's Imagination Library

Wednesday, May 2, 2018

By Carla Daily



DACdb on July 1 (New Interface)*


[Home](#)
[My DATA](#)
[My CLUB](#)
[DISTRICT](#)
[Help](#)
Rotary District 6860 - Madison 

MY CLUB NAVIGATION

- My Club Members <
- Find Member
- Member Cards
- Club Leadership History
- Admin Functions <
- Club Setup
- Help Functions <

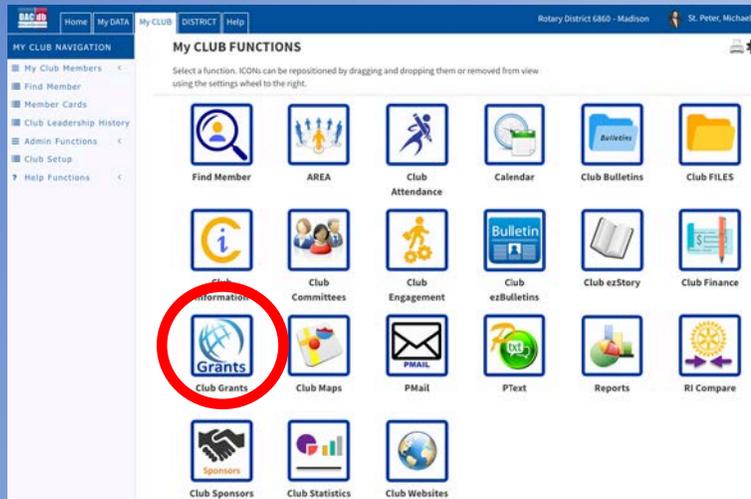
My CLUB FUNCTIONS 

Select a function. ICONS can be repositioned by dragging and dropping them or removed from view using the settings wheel to the right.

 Find Member	 AREA	 Club Attendance	 Calendar	 Club Bulletins	 Club FILES
 Club Information	 Club Committees	 Club Engagement	 Club ezBulletins	 Club ezStory	 Club Finance
 Club Grants	 Club Maps	 PMail	 PText	 Reports	 RI Compare
 Club Sponsors	 Club Statistics	 Club Websites			

*** June 1 for level 4
(club leadership)**

Login to DACdb and select the **Club Grants** icon or **Grants** tab.



Select **Admin** and then **Club Signatures** in the **Grant Navigation** bar.

GRANT NAVIGATION

- [Grant Overview](#)
- [Club Grants](#)
- [Grant Secure Files](#)
- Admin**
- Club Signatures**
- [Help](#)

District Grants Overview [2017-18]

[Change OrgYear](#)

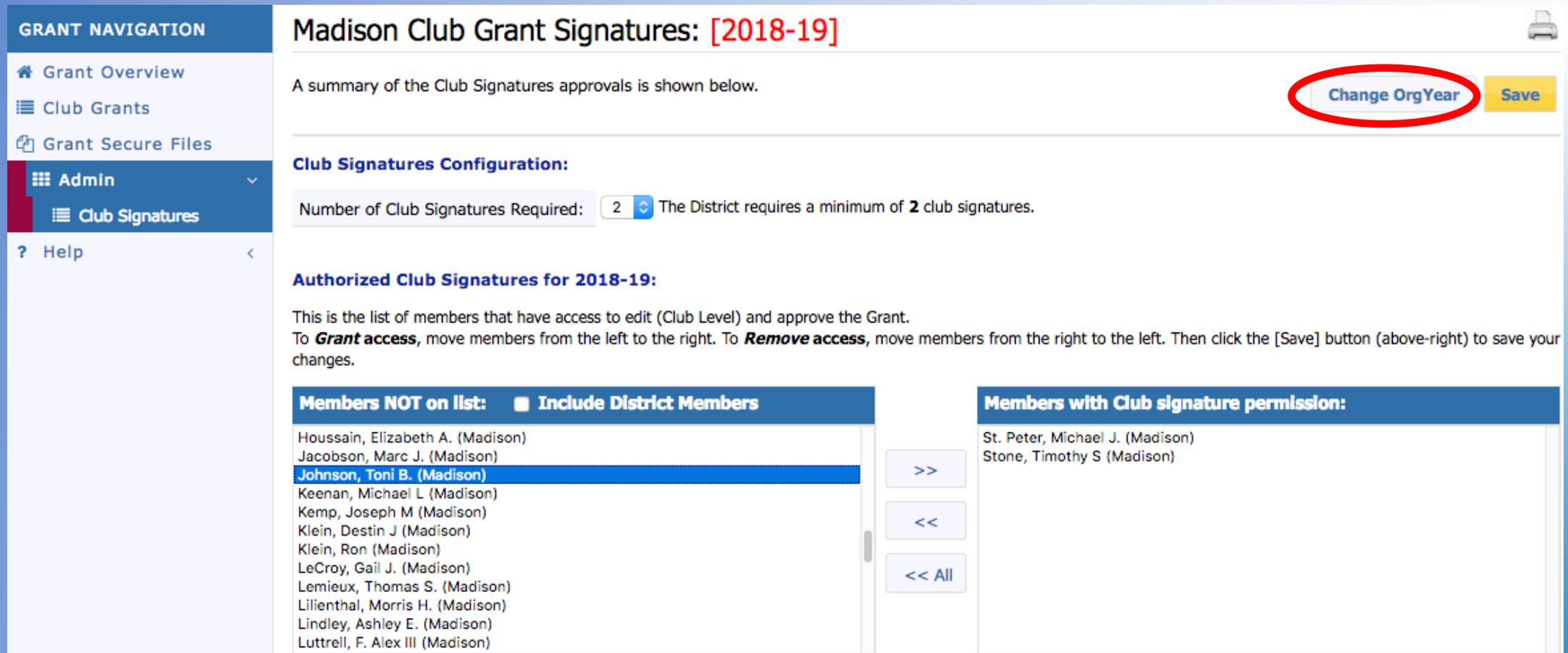
1/30/2018 Update: To support DDF tracking of multiple DDF requests coming from multiple clubs, the way DDF and other funding is entered as changed. The attached release note covers that changes. In addition, a new security level was added to Setup for viewing and editing of Grants. The release note can be found [here](#) or under the Help link on the left hand navigation.

District grants offer clubs and districts flexibility in carrying out activities supporting the Foundation Mission. Districts are encouraged to distribute these grant funds for relatively short-term activities, either local or international.

District grants fund smaller, short-term activities that address needs in both your local community and communities worldwide. Each district gets to choose which activities it will fund with these grants.

Districts can request up to 50 percent of their District Designated Fund (DDF) in one annual block grant. Districts are responsible for administering the activities undertaken with these funds. They may disperse these grant funds at their discretion for district- or club-sponsored activities. In addition:

Click **Change OrgYear** and set the year to **2018-19** to identify all club members with signature permission for the new Rotary year.



GRANT NAVIGATION

- Grant Overview
- Club Grants
- Grant Secure Files
- Admin**
 - Club Signatures**
- Help

Madison Club Grant Signatures: [2018-19]

A summary of the Club Signatures approvals is shown below.

Club Signatures Configuration:

Number of Club Signatures Required: The District requires a minimum of **2** club signatures.

Authorized Club Signatures for 2018-19:

This is the list of members that have access to edit (Club Level) and approve the Grant. To **Grant access**, move members from the left to the right. To **Remove access**, move members from the right to the left. Then click the [Save] button (above-right) to save your changes.

Members NOT on list: Include District Members

- Houssain, Elizabeth A. (Madison)
- Jacobson, Marc J. (Madison)
- Johnson, Toni B. (Madison)**
- Keenan, Michael L (Madison)
- Kemp, Joseph M (Madison)
- Klein, Destin J (Madison)
- Klein, Ron (Madison)
- LeCroy, Gail J. (Madison)
- Lemieux, Thomas S. (Madison)
- Lilienthal, Morris H. (Madison)
- Lindley, Ashley E. (Madison)
- Luttrell, F. Alex III (Madison)

Members with Club signature permission:

- St. Peter, Michael J. (Madison)
- Stone, Timothy S (Madison)

Buttons: >>, <<, << All

Buttons: Change OrgYear, Save

Use the right arrows (>>) to move names to the signature list, and then click **Save**.

GRANT NAVIGATION

- Grant Overview
- Club Grants
- Grant Secure Files
- Admin**
- Club Signatures
- Help

Madison Club Grant Signatures: [2018-19]

A summary of the Club Signatures approvals is shown below.

[Change OrgYear](#) [Save](#)

Save Successful:
The signature authority has been saved successfully.

Club Signatures Configuration:

Number of Club Signatures Required: The District requires a minimum of **2** club signatures.

Authorized Club Signatures for 2018-19:

This is the list of members that have access to edit (Club Level) and approve the Grant.
To **Grant access**, move members from the left to the right. To **Remove access**, move members from the right to the left. Then click the [Save] button (above-right) to save your changes.

Members NOT on list: <input checked="" type="checkbox"/> Include District Members		Members with Club signature permission:
Allen, John E. (Madison)	<input type="button" value=">>"/> <input type="button" value="<<"/> <input type="button" value="<< All"/>	Johnson, Toni B. (Madison)
Alvarez, Peter (Madison)		St. Peter, Michael J. (Madison)
Bedsole, Keith A. (Madison)		Stone, Timothy S (Madison)
Berger, Donna J. (Madison)		
Blackwell, Pamela P (Madison)		
Brennan, Craig R. (Madison)		
Brown, J. Scott (Madison)		
Brown, Michael Alan (Madison)		
Canale, Jason M. (Madison)		
Cedeno, Kevin L (Madison)		
Cepeda, Sandra L. (Madison)		
Coleman, Andre (Madison)		

Select CLUB GRANTS in the Grant Navigation bar.

GRANT NAVIGATION

- 🏠 Grant Overview
- 📁 Club Grants**
- 📁 Grant Secure Files
- ⚙️ Admin
- 🔍 Help

District Grants Overview [2017-18]

[Change OrgYear](#)

1/30/2018 Update: To support DDF tracking of multiple DDF requests coming from multiple clubs, the way DDF and other funding is entered as changed. The attached release note covers that changes. In addition, a new security level was added to Setup for viewing and editing of Grants. The release note can be found [here](#) or under the Help link on the left hand navigation.

District grants offer clubs and districts flexibility in carrying out activities supporting the Foundation Mission. Districts are encouraged to distribute these grant funds for relatively short-term activities, either local or international.

District grants fund smaller, short-term activities that address needs in both your local community and communities worldwide. Each district gets to choose which activities it will fund with these grants.

Districts can request up to 50 percent of their District Designated Fund (DDF) in one annual block grant. Districts are responsible for administering the activities undertaken with these funds. They may disperse these grant funds at their discretion for district- or club-sponsored activities. In addition:



Then click on **New Club Grant Request...**

GRANT NAVIGATION

- 🏠 Grant Overview
- 📁 Club Grants**
- 📁 Grant Secure Files
- ⚙️ Admin
- 🔍 Help

Club Madison Grants [2018-19]






A summary is shown below of all grants submitted to the District from this Club.
 When more than one club is working on together on a Grant, the sponsor club is designated (*) below.
 Click on **\$** below, to fund the Club grant. This will open a dialog where the *Amount* and *Check No* can be entered.

[Change OrgYear](#)
[New Club Grant Request - Click Here to Create Grant](#)

No Grants Found

↕	Action	Project Name	↕	Proj No	↕	Club	↕	Status	↕	Requested DDF	↕	Approved DDF	↕	Other Funding	↕	Total Project Budget
No Grants found in 2018-19 OrgYear																

Complete all sections in the **Details, Clubs Involved** and **Application** tabs.

Grant Details [2018-19] ID=0

Grant Status: **New Grant Request** Fill out the Grant information shown below. Click "Save" when you are ready. After saving the initial Grant, the system will assign the RI Project No (GrantID), and will enable the Budget and Document Tabs to allow more detailed Budget information and project file data to be entered or uploaded.

Save

- Details
- Clubs Involved
- Contacts
- Application

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

* Project Name:

Priority:

* Project Org Year: 0 **2018-19** OrgYear can be changed by District (if needed)

* Round: (e.g., 1 or 2)

* City:

* State:

* Country:

Target Completion Date:  Target completion date for this project.

Area of Focus:

- Promoting Peace
- Promoting Clean Water, Sanitation and Hygiene
- Saving Mothers and Children
- Growing Local Economies
- Fighting Disease
- Supporting Education
- Other:

* Project Description:

The Target Completion Date on the Details tab must match the Completion Date on the Application tab.

Grant Details [2018-19] ID=0

Grant Status: **New Grant Request** Fill out the Grant information shown below. Click "Save" when you are ready. After saving the initial Grant, the system will assign the RI Project No (GrantID), and will enable the Budget and Document Tabs to allow more detailed Budget information and project file data to be entered or uploaded. Save

Details Clubs Involved Contacts Application

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

* Project Name:

Priority:

* Project Org Year: 0 **2018-19** OrgYear can be changed by District (if needed)

* Round: (e.g., 1 or 2)

* City:

* State:

* Country:

Target Completion Date: Target completion date for this project.

Area of Focus:

Promoting Peace Fighting Disease

Promoting Clean Water, Sanitation and Hygiene

Saving Mothers and Children Supporting Education

Growing Local Economies Other:

Project's area of focus (optional) -- previous entries will appear after typing a couple of characters

* Project Description:

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Submitted Grant for District Approval** This Grant is **locked** and you are in its current state. However, you may continue to add expenses, upload files and file reports. submitted for **approval by the District**.

Details Clubs Involved Contacts **Application** Budget Documents

Fill out the detailed grant application form below.

Grant Timeframe

*Start Date:

*Completion Date:

Address To Mail Grant Payment

*Name:

*Address:

*City:

*State:

*Zipcode:

Project Definition

In the **Clubs Involved** tab identify other clubs, if any, that will partner on the project.

Grant Details [2018-19] ID=0

Grant Status: **New Grant Request** Fill out the Grant information shown below. Click "Save" when you are ready. After saving the initial Grant, the system will assign the RI Project No (GrantID), and will enable the Budget and Document Tabs to allow more detailed Budget information and project file data to be entered or uploaded.

Save

Details **Clubs Involved** Contacts Application

Enter the **other** clubs involved with this project below. The primary club must remain on this list.

The DDF from the other clubs participating can be aggregated into the total requested for this project on the DETAIL tab. After the initial project is created, the DDF funding can be adjust up to the maximum allocated to each club.

* Clubs Involved:

District Club List

Alabaster-Pelham (4018)
Albertville (4019)
Alexander City (29375)
Aliceville (4020)
Anniston (4021)
Anniston Morning (27826)
Arab (4022)
Athens (4024)
Bessemer (4025)
Birmingham (4026)

>>

<<

Clubs Involved

Madison (51965)

Once you click **SAVE**, the **Budget** and **Documents** tab appear.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Draft** Enter the required information for this Grant, and submit the Grant for Club Signatures (Click the [Collect Club Signatures] button).
 This will start the process to collect the required number of club signatures prior to submitting the Grant to the District for approval.

Club: Collect Grant Signatures
Save

Details
Clubs Involved
Contacts
Application
Budget
Documents

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

*** Project Name:**

Priority:

*** Project Org Year: 1**

OrgYear can be changed by District (if needed)

*** Round:**

(e.g., 1 or 2)

*** City:**

*** State:**

*** Country:**

Target Completion Date:

Target completion date for this project.

Area of Focus:

Promoting Peace
 Fighting Disease
 Promoting Clean Water, Sanitation and Hygiene
 Saving Mothers and Children
 Supporting Education
 Growing Local Economies
 Other:

Project's area of focus (optional) -- previous entires will appear after typing a couple of characters

The Madison City Recreation Department said they needed to replace trees that had to be cut down at the city's main community recreation park (Dublin Park) and playground (Kid's Kingdom). Also, there is a children's garden area at the local public library where we would like to place some trees. We would purchase the trees from a local nursery which helps the city's economical growth and plant the trees as a community service project. We plan on purchasing some large, mature shade trees so that the areas will have immediate benefits and some smaller trees for future benefits.

*** Project Description:**

List only the club members involved in compiling the grant application on the **Contacts** tab.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Draft** Enter the required information for this Grant, and submit the Grant for Club Signatures (Click the [Collect Club Signatures] button).

Club: Collect Grant Signatures

Save

This will start the process to collect the required number of club signatures prior to submitting the Grant to the District for approval.

Details Clubs Involved **Contacts** Application Budget Documents

Select the members to be included in automatic email updates about this Grant. If you changed or added clubs involved with this Grant, save the Grant first before picking from the list.

*Contacts:

Members NOT on list: Include District Members

Jacobson, Marc J. (Madison)

Johnson, Toni B. (Madison)

Keenan, Michael L (Madison)

Kemp, Joseph M (Madison)

Klein, Destin J (Madison)

Klein, Ron (Madison)

LeCroy, Gail J. (Madison)

Lemieux, Thomas S. (Madison)

Lilienthal, Morris H. (Madison)

Lindley, Ashley E. (Madison)

>>

<<

<< All

Members on Contact List:

St. Peter, Michael J. (Madison)

Automated emails will be sent to this list, so make sure to include only interested parties. Click **SAVE.**

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Draft** Enter the required information for this Grant, and submit the Grant for Club Signatures (Click the [Collect Club Signatures] button).
This will start the process to collect the required number of club signatures prior to submitting the Grant to the District for approval.

[Club: Collect Grant Signatures](#) [Save](#)

- Details
- Clubs Involved
- Contacts
- Application
- Budget
- Documents

Select the members to be included in automatic email updates about this Grant. If you changed or added clubs involved with this Grant, save the Grant first before picking from the list.

*Contacts:

Members NOT on list: **Include District Members**

- Allen, John E. (Madison)
- Alvarez, Peter (Madison)
- Bedsole, Keith A. (Madison)
- Berger, Donna J. (Madison)
- Blackwell, Pamela P (Madison)
- Brennan, Craig R. (Madison)
- Brown, J. Scott (Madison)
- Brown, Michael Alan (Madison)
- Canale, Jason M. (Madison)
- Cedeno, Kevin L (Madison)

Members on Contact List:

- Johnson, Toni B. (Madison)
- St. Peter, Michael J. (Madison)

>> << << All

Next, complete the **Application tab**. Make sure all sections with a **red *** are filled. Click **SAVE** often.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Draft** Enter the required information for this Grant, and submit the Grant for Club Signatures (Click the [Collect Club Signatures] button).
This will start the process to collect the required number of club signatures prior to submitting the Grant to the District for approval.

[Club: Collect Grant Signatures](#) [Save](#)

Details **Clubs Involved** **Contact** **Application** **Budget** **Documents**

Fill out the detailed grant application form below.

Grant Timeframe

*Start Date: 10/01/2018

*Completion Date: 05/15/2019

Address To Mail Grant Payment

*Name: Rotary Club of Madison

*Address: P. O. Box 856

*City: Madison

*State: Alabama

*Zipcode: 35758

Project Definition

*Describe the project objectives.

Provide local community service that enhances the beauty of our community while providing economic and environmental benefits to our community.

Grant Checks will be Sent to this address

Application tab continued Make sure all sections with a red * are filled. Click **SAVE** often.

*Humanitarian Efforts: Describe how the project will benefit the community and/or improve the lives of the less fortunate.

Planting trees in the city park, children's playground area, and library garden will provide shade, help prevent erosion, reduces stress, and encourages pride of place. The trees will be a symbol of hope and belief in the future of our community. The positive environment created by aesthetically-pleasing landscaping not only welcomes the community to visit the park, playground, and library garden but also enhances their perception of the level of pride in the community.

*Active Rotarian Involvement: Describe the nonfinancial participation by Rotarians in the project.

Madison Club members will obtain the trees, coordinate with the Recreation Department and Public Library, obtain and plant the trees as a community service project.

*Publicity Plan: How will the general public know this is a rotary sponsored project?

We will post it on our public website, get articles in the Madison weekly paper and monthly Madison Living Magazine, and the city and library will have flyers posted on their bulletin boards. We will also be wearing our Rotarians at work t-shirts during the planting.

If the project involves a cooperating organization, please provide the name of the organization and attach a letter of participation in the documents section.

Pay special attention to the **Agreement** and **TRF Policies** and check boxes to affirm your understanding. Remember to click **SAVE**.

Club Statement of Agreement

* This document is the ELECTRONIC APPLICATION to request The Rotary Foundation District Grant Funds. It is an agreement between the Club and District 6860 acknowledging 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 it will comply with all Foundation requirements for use, management and reporting of district grant funds including, but not limited to items listed below.

Club must maintain a standard set of accounts, which includes a complete record of all receipts and disbursements of grant funds. The Club will disburse grant funds as allowed under the Terms and Conditions for Rotary Foundation District Grants and Global Grants. The Club will keep grant funds separate from club operating funds. The Club will establish an inventory system for equipment and other assets purchased with grant funds and maintain records for items that are purchased, produced or distributed through grant activities. The Club will ensure that all grant activities, including the conversion of funds, comply with local law.

The Club bank account must be a low or noninterest-bearing account and must have a minimum of two Rotarian signatories from the club for disbursement. Grant funds may not be deposited in investment accounts including, but not limited to mutual funds, certificates of deposit, bonds and stocks. Bank statements must be available to support receipt and use of TRF grant funds. The Club must maintain a written plan for transferring custody of the bank accounts in the event of a change of signatories.

The Club will submit a final report on the use of grant funds within 60 days of project completion. All projects must be completed and reported on by June 15 of the program year in which the funds are awarded. All grant funds must be spent and reported on in the year they are awarded. Grant funds must be used only for the approved request and must be returned if used inappropriately or if the project cannot be completed in the program year.

Yes, I Understand and accept the terms of the Club Statement Agreement.

TRF Policies

* I confirm that our Rotary Club is requesting a District Grant in the amount above and that funds will be spent in accordance with all applicable TRF policies. All of the information contained herein is true and accurate.

Yes, I Understand and accept the terms and conditions.

Next, complete the **Budget tab**. Click **Add Income Source** to enter income items.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Draft** Enter the required information for this Grant, and submit the Grant for Club Signatures (Click the [Collect Club Signatures] button).
This will start the process to collect the required number of club signatures prior to submitting the Grant to the District for approval.

[Club: Collect Grant Signatures](#) [Save](#)

Details | **Clubs Involved** | **Contacts** | **Application** | **Budget** | **Documents**

Income Items [Add Income Source](#)

Action	Item Name	Club	DDF	Amount	Created	Modified
There is NO income source defined. Add the DDF amount being requested and other funding Income sources above.						
Income Total: 0 out of 1 club(s) contributed				\$0.00	(DDF Request: \$0.00 , Other Funding: \$0.00)	

Expense Items [Add Expense](#)

Action	Item Name	Club	Amount	Created	Modified
Expense Total:			\$0.00		

Budget Summary

Description	Amount
Total Income (DDF+Club Funding):	\$0.00
Expenses Items:	\$0.00
Cash Flow (Income - Expense):	\$0.00

Identify the DDF Requested and other sources of income. Click **Add** for each item.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Draft** Enter the required information for this Grant, and submit the Grant for Club Signatures (Click the [Collect Club Signatures] button).
This will start the process to collect the required number of club signatures prior to submitting the Grant to the District for approval.

Club: Collect Grant Signatures Save

Budget Item Entry

Enter the Grant funding information below. Specify if the funding source is coming from requested DDF funds or part of the club contribution.

Description: DDF Requested

Club: Madison (51965)

Amount: 1000.00

Funding Source: DDF Requested Other Club Funding

Cancel Add

Income Items

Action	Item Name	Created	Modified
	Club Project Fund	Michael J. 02/16/2018 12:11 AM	
		(DDF Request: \$0.00 , Other Funding: \$200.00)	

Expense Items

Action	Item Name	Club	Amount	Created	Modified
	Trees				
	Supplies such as top soil	Madison	\$200.00	St. Peter, Michael J. 02/15/2018 11:55 PM	St. Peter, Michael J. 02/15/2018 11:55 PM
	Signage	Madison	\$200.00	St. Peter, Michael J. 02/16/2018 12:14 AM	
Expense Total:			\$1,200.00		

Click **Add Expense** to identify each estimated expense item. Click **Add** for each item.

The screenshot displays a web application interface for budget management. At the top, there are navigation tabs: Details, Clubs Involved, Contacts, Application, Budget, and Documents. The main content area is divided into sections: Income Items, Expense Items, and Budget Summary. A modal dialog box titled "Add Expense Item" is open in the center, prompting the user to enter grant funding information. The dialog contains the following fields:

- Description: Trees
- Club: Madison (51965)
- Amount: 800.00

Buttons for "Cancel" and "Add" are located at the bottom of the dialog. The background shows a table for "Income Items" with a message "There is NO income source" and a table for "Expense Items" with a message "There is NO expense item". The "Budget Summary" table shows the following values:

Description	
Total Income (DDF+Club Funding):	\$0.00
Expenses Items:	\$0.00
Cash Flow (Income - Expense):	\$0.00

After all **Income** and **Expenses** are entered, the **Budget Summary** must total \$0.00 . Click **SAVE.**

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Draft** Enter the required information for this Grant, and submit the Grant for Club Signatures (Click the [Collect Club Signatures] button). Club: Collect Grant Signatures Save

This will start the process to collect the required number of club signatures prior to submitting the Grant to the District for approval.

Details **Clubs Involved** **Contacts** **Application** **Budget** **Documents**

Income Items Add Income Source

Action	Item Name	Club	DDF	Amount	Created	Modified
 	Club Project Funds	Madison		\$200.00	St. Peter, Michael J. 02/16/2018 12:11 AM	
 	DDF Requested	Madison	✓	\$1,000.00	St. Peter, Michael J. 02/17/2018 01:39 PM	
Income Total:		1 out of 1 club(s) contributed		\$1,200.00	(DDF Request: \$1,000.00 , Other Funding: \$200.00)	

Expense Items Add Expense

Action	Item Name	Club	Amount	Created	Modified
 	Trees	Madison	\$800.00	St. Peter, Michael J. 02/15/2018 11:54 PM	
 	Supplies such as top soil	Madison	\$200.00	St. Peter, Michael J. 02/15/2018 11:55 PM	St. Peter, Michael J. 02/15/2018 11:55 PM
 	Signage	Madison	\$200.00	St. Peter, Michael J. 02/16/2018 12:14 AM	
Expense Total:			\$1,200.00		

Budget Summary

Description	Amount
Total Income (DDF+Club Funding):	\$1,200.00
Expenses Items:	(\$1,200.00)
Cash Flow (Income - Expense):	\$0.00

Next, complete the **Documents tab**. Upload any letters of commitment, quotes and other relevant documents.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Draft** Enter the required information for this Grant, and submit the Grant for Club Signatures (Click the [Collect Club Signatures] button).

Club: Collect Grant Signatures

Save

This will start the process to collect the required number of club signatures prior to submitting the Grant to the District for approval.

Details Clubs Involved Contacts Application Budget **Documents**

The documents tab allows for management of all documents related to this grant.

NEW To VIEW a file, click on the file name. The "View" link under the Action column has been removed for consistency in the User Interface.

DO NOT upload files with file names containing special characters (e.g., ";:*%\$@!). Rename your file locally and then upload it.

Upload File

Add Folder

Navigation: [Home](#)

Action	Type	File Name	Modified	Size	Attributes
		Backup	2018-02-16 00:01:47	4 KB	
		Documents	2018-02-15 23:22:03	0 KB	
		Images	2018-02-15 23:22:03	0 KB	
		GrantApplication.html	2018-02-16 00:01:47	12 KB	
3 Directories 1 File			Directory Space Used:	16 KB	

Once all six tabs are completed and verified, click on **Club: Collect Grant Signatures** to begin the signoff process. Remember that the **Club President for 2018-19** must be one of the two signers.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Draft** Enter the required information for this Grant, and submit the Grant for Club Signatures (Click the [Collect Club Signatures] button). This will start the process to collect the required number of club signatures prior to submitting the Grant to the District for approval.

Club: Collect Grant Signatures Save

Details Clubs Involved Contacts Application Budget Documents

The documents tab allows for management of all documents related to this grant.
NEW To VIEW a file, click on the file name. The "View" link under the Action column has been removed for consistency in the User Interface.
 DO NOT upload files with file names containing special characters (e.g., " ; : * % \$ @ !). Rename your file locally and then upload it.

Upload File Add Folder

Navigation: **Home**

Action	Type	File Name	Modified	Size	Attributes
		Backup	2018-02-16 00:01:47	4 KB	
		Documents	2018-02-15 23:22:03	0 KB	
		Images	2018-02-15 23:22:03	0 KB	
		GrantApplication.html	2018-02-16 00:01:47	12 KB	
3 Directories 1 File			Directory Space Used:	16 KB	

Click **OK** to confirm the initiation of signoff.

Note: When you click OK to confirm, the Grant application will be locked.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Draft** Enter the required information for this Grant, and submit the Grant for Club Signatures (Click the [Collect Club Signatures] button).
This will start the process to collect the required number of club signatures prior to submitting the Grant to the District for approval.

Save

Please confirm - you are about to start the process to collect the club signatures on this Grant application. If you continue, the next step is for the Club to get the required number of signatures so the Grant can be submitted to the District for Approval. OK, to Continue?

Cancel **OK**

Upload File **Add Folder**

Navigation: [Home](#)

Action	Type	File Name	Modified	Size	Attributes
	Folder	Backup	2018-02-17 20:18:59	4 KB	
 	Folder	Documents	2018-02-15 23:22:03	0 KB	
 	Folder	Images	2018-02-15 23:22:03	0 KB	
	File	GrantApplication.html	2018-02-17 20:18:59	12 KB	
3 Directories 1 File				Directory Space Used:	16 KB

The **Club: Sign Grant Application** box will appear. Each signer will click on this box to sign. Note also that the **Activity Log** and **Signatures** tabs will appear.

Note that the **Signatures** tab is only for review of signature history.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Submitted Grant for Club Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. Signature are required from **1** Club:

- Only **0** of 2 lead club signatures made
- Only **0** of 2 total signatures made.

Club: Sign Grant Application **Revert To Draft**

Details **Clubs Involved** **Contacts** **Application** **Budget** **Documents** **Activity Log** **Signatures**

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

* Project Name:	<input type="text" value="Trees For Madison"/>
Priority:	<input type="text" value="Medium"/>
* Project Org Year: 2	2018-19 <small>OrgYear can be changed by District (if needed)</small>
* Round:	<input type="text" value="1"/> <small>(e.g., 1 or 2)</small>
* City:	<input type="text" value="Madison"/>
* State:	<input type="text" value="Alabama"/>
* Country:	<input type="text" value="USA"/>
Target Completion Date:	<input type="text" value="05/15/2018"/> <small>Target completion date for this project.</small>

The **Grant Signatures** box will pop up. Click **Sign Grant**.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Submitted Grant for Club Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. Signature are required from **1** Club:

- Only **0** of 2 lead club signatures made
- Only **0** of 2 total signatures made.

[Club: Sign Grant Application](#) [Revert To Draft](#)

Details | Clubs Involved | Contacts | Application | Budget | Documents | Activity Log | Signatures

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

Grant Signatures

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

Signed By	Club	Date
-----------	------	------

[Sign Grant](#) [Cancel](#)

Target Completion Date:  Target completion date for this project.

Check the **Signatures** tab to confirm that the first signature was recorded.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Submitted Grant for Club Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. Signature are required from **1** Club:

- Only **1** of 2 lead club signatures made
- Only **1** of 2 total signatures made.

[Club: Sign Grant Application](#) [Revert To Draft](#)

Details **Clubs Involved** **Contacts** **Application** **Budget** **Documents** **Activity Log** **Signatures**

Submitted Grant for Club Approval

Club Madison Signature St. Peter, Michael J. e/Signature	Member Position	02/17/2018 09:32 PM Date
--	---------------------------	------------------------------------

Grant Application Club Signatures

Club Madison Signatures (1 of 2 Received) St. Peter, Michael J. e/Signature	Member Position	02/17/2018 09:34 PM Date
---	---------------------------	------------------------------------

The second signer logs in to DACdb, select the **GRANTS** tab, and clicks on the **edit pencil**.

Home CLUBS My CLUB My DATA Committees PMail Calendar NC Finance Reports Speakers **Grants** Club PAGES Files Forms ATTND Engage AREA Help

GRANT NAVIGATION

- Grant Overview
- Club Grants
- Grant Secure Files
- Admin
- Help

Club Madison Grants [2018-19]

A summary is shown below of all grants submitted to the District from this Club.
 When more than one club is working on together on a Grant, the sponsor club is designated (*) below.
 Click on \$ below, to fund the Club grant. This will open a dialog where the *Amount* and *Check No* can be entered.

[New Club Grant Request - Click Here to Create Grant](#)

[Change OrgYear](#)

Club Process										
Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget		
	Trees For Madison	5080	Madison	Submitted Grant for Club Approval	0.00	1,000.00	200.00	1,200.00		
No Grants: 1					0.00	1,000.00	200.00	1,200.00		

The second signer clicks on **Club: Sign Grant Application.**

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Submitted Grant for Club Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. Signature are required from **1** Club:

- Only **1** of 2 lead club signatures made
- Only **1** of 2 total signatures made.

Club: Sign Grant Application [Revert To Draft](#)

Details **Clubs Involved** **Contacts** **Application** **Budget** **Documents** **Activity Log** **Signatures**

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

* Project Name:	<input type="text" value="Trees For Madison"/>
Priority:	<input type="text" value="Medium"/>
* Project Org Year: 2	2018-19 <small>OrgYear can be changed by District (if needed)</small>
* Round:	<input type="text" value="1"/> <small>(e.g., 1 or 2)</small>
* City:	<input type="text" value="Madison"/>
* State:	<input type="text" value="Alabama"/>
* Country:	<input type="text" value="USA"/>
Target Completion Date:	<input type="text" value="05/15/2018"/> <small>Target completion date for this project.</small>

The **Grant Signatures** box will pop up. Click **Sign Grant**.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Submitted Grant for Club Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. Signature are required from **1** Club:

- Only **1** of 2 lead club signatures made
- Only **1** of 2 total signatures made.

Club: Sign Grant Application **Revert To Draft**

Details Clubs Involved Contacts Application Budget Documents Activity Log Signatures

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

Grant Signatures

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

Signed By	Club	Date
St. Peter, Michael J.	Madison	02/17/2018 09:34 PM

Sign Grant **Cancel**

Target Completion Date: 05/15/2018 Target completion date for this project.

Check the **Signatures** tab to confirm that the second signature was recorded. The **Submit Grant for District Approval** box appears. Click this box.

Edit Grant: Trees For Madison [2018-19] ID=5080

Grant Status: **Submitted Grant for Club Approval** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. **The Grant can now be submitted to the District for approval!**

Revert To Draft **Submit Grant for District Approval**

Club: S Submit this Grant for District

Details Clubs Involved Contacts Application Budget Documents Activity Log **Signatures**

Submitted Grant for Club Approval

Club Madison Signature	Member	02/17/2018 09:32 PM
St. Peter, Michael J.	Member	02/17/2018 09:32 PM
e/Signature	Position	Date

Grant Application Club Signatures

Club Madison Signatures (2 of 2 Received)

Club Madison Signatures	President	07/01/2018 09:43 PM
Stone, Timothy S	President	07/01/2018 09:43 PM
e/Signature	Position	Date
St. Peter, Michael J.	Member	02/17/2018 09:34 PM
e/Signature	Position	Date

The Grant Application has been sent to the District for review.

The **Grant Status** now shows **Submitted Grant for District Approval**. Once the application has been approved, the status will change to **Approved Grant**.

Club Madison Grants [2018-19]



A summary is shown below of all grants submitted to the District from this Club.

When more than one club is working on together on a Grant, the sponsor club is designated (*) below.

Click on **\$** below, to fund the Club grant. This will open a dialog where the *Amount* and *Check No* can be entered.

[New Club Grant Request - Click Here to Create Grant](#)

[Change OrgYear](#)

District Review and Approval										
<input type="checkbox"/>	Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget	
<input type="checkbox"/>		Trees For Madison	5080	Madison	Submitted Grant for District Approval	0.00	1,000.00	200.00	1,200.00	
No Grants: 1						0.00	1,000.00	200.00	1,200.00	

What Happens Next?

- After the Application is submitted to the district, the District Grants Subcommittee Team will review the report and associated documents for any issues or concerns.
- The Project Lead interacts with the District Grant Subcommittee Team to achieve approval of the Application. This interaction may require modifying the Application and/or other supporting information and resubmitting the Application.
- If a grant has to be unlocked for modification, **Signatures** must be collected again in order to resubmit.
- During the review process, PEmails are sent to everyone listed in the **CONTACTS** tab. Clean up this list! Make sure all of these people want to see every message during the review.

What Happens Next?

- Clubs will be notified by PMail when their Application is approved, (but not yet funded).
- Grant Application continues with several District 6860 approvals before being forwarded to TRF as a block grant for final approval and funding.
- TRF approves and funds block grant (note: clubs may not incur expenses dated before the TRF approval date), to District 6860.
- District dispenses grant funding to clubs.
- Clubs execute their projects.
- Clubs complete their project, submit Final Report.
 - **Note that a currency conversion spreadsheet is required for international projects.**
- Approved Final Report closes grant.

In Review...

- General Overview
- Critical dates
- Login to DACdb
- Details tab
- Contacts tab
- Application tab
- Budget tab
- Documents tab
- Signatures
- Final Report tab

Questions?

Resources

- All District Grant related documents are on the District 6860 website at <http://rotary6860.org/foundation.php>.
- This slide show, “District Grant 2018-19 Club Qualification Training”, is also on the District 6860 website at the same location.
- The slide show “District Grant 2017-18 Final Report Submission and Approval Process” is also on the District 6860 website at the same location.