



DACDB GRANTS MODULE

Applying for District 5080 Local & International Grants



DISTRICT GRANTS

First Steps

- Obtain Club Permission.
- Assign Club Stewardship Chair
- Recruit contacts for Grant Committee
- Completion of District Grants Qualification Training
- Download pertinent documents.

DISTRICT GRANTS FIRST STEPS

Obtain Club Permission

- Agreement between Board of Directors and Grant Sponsor as to purpose and scope.
- Agreement by Board of Directors to contribute financially to the Grant.

DISTRICT GRANTS FIRST STEPS

Assign Club Stewardship Chair

- One Club member designated as the Club Steward for this or all District Grants.

DISTRICT GRANTS FIRST STEPS

Recruit contacts for Grant Committee

- Identify primary and committee contacts to manage the grant.
- List three individuals as signers for the District Grant

DISTRICT GRANTS FIRST STEPS

Completion of District Grants Qualification Training

- Club Steward must be trained for the current year (year of the grant).
- Primary contact and one other contact must be trained for the current year (year of the grant)

DISTRICT GRANTS FIRST STEPS

Download pertinent documents

- Checklist for Local Grants, or
- Checklist for International Grants
- Memorandum of Understanding – Between Club and District
Signed by Current Club President*, Project Year Club President & Club Steward
- Memorandum of Understanding – Cooperating Organizations
If applicable to the grant
- Complete and save the documents for later upload to the DACdb Grants Module

If the current Club President and the Project Year Club President are the same person another officer (Treasurer, Secretary) may be substituted for the Current Club President signature.

DISTRICT GRANTS

Next Steps

- Access DACdb
- Setup Club Parameters in DACdb
- Access DACdb Grants Module
- Setup DACdb Grants Module
- Complete Initial Application
- Continue Completing Application
- Upload preliminary documents
- Submit application for Club signatures.

DISTRICT GRANTS NEXT STEPS


Access DACdb

- Go to www.dacdb.com
- Enter your email address or click on Forgot Username?
- Enter your password or click on Forgot/Reset Password?
- If this is still not working contact the District 5080 DCO, Kees van der Pol at cjvdpol@gmail.com

DISTRICT GRANTS NEXT STEPS

Setup Club Parameters in DACdb

This must be completed by a Club member with a security level of 4+ (President, President-Elect, Secretary, Treasurer)

- Click on the My Club tab at the top of the screen.
- Click on Admin Functions
- Click on Edit Club Positions
- For the individual selected as Club Steward, click on the pencil edit  to the left of the name.
- Click the Add button
- When the new selection opens, click on the Add button.
- Be sure the date range reflects the beginning and end of the grant year.
- Choose the Club Grant Steward checkbox, then click on the Save button at the bottom of the window.

DISTRICT GRANTS NEXT STEPS

Access DACdb Grants Module

- If the Club Grants icon is viewable in the My Club screen, click on the Club Grants icon.
- If the Club Grant icon is not viewable, click on the configure wheel ⚙ in the upper right corner.
- Find the Grants button in the lower (Available Icons) area and drag it to the top (Icons Displayed) area.
- Click on Set My Configuration
- Click on the Club Grants icon.
- Setup Grant Writer Parameters in DACdb Grants Module (who is eligible to write the grant?)
- Setup Club Signatures Parameters in DACdb Grants Module (who is eligible to sign the grant?)

DISTRICT GRANTS NEXT STEPS

Setup DACdb Grants Module

- Click on the Admin dropdown
- Setup Club Signatures Parameters
Choose who in your Club will be eligible to sign for this grant. (Current year District Grant Training is required for at least two of the signers)

DISTRICT GRANTS NEXT STEPS

Complete Initial Application

- On the Details tab enter the Project Name
- Ensure that project year reflects the year in which the project will be completed.
- Skip Round
- Enter City, State, Country information
- Enter Target Completion Date
This should be no later than April 30th of the project year.
- Area of Focus is not required but it is helpful.
- Enter a description of the project.
No more than 400 words.
- Click the Save button.

DISTRICT GRANTS NEXT STEPS

Continue Completing Application

1. On the Club Involved tab
 - Your club will automatically be entered.
 - Add other clubs as appropriate
 - Click the Save button
2. On the Contacts tab
 - Enter all members who should receive automate progress notifications for this Grant
 - Click the Save button

DISTRICT GRANTS NEXT STEPS

Continue Completing Application

3. On the Application tab
 - Enter information into all the starred fields and click on the Agreement Statements
 - Click the Save button
4. On the Budget tab
 - Enter all funding sources, including Club contributions, other contributions & requested DDF.
 - Enter all budget expenses (be specific and thorough)
 - All funds should be entered in local funds. (non-USD funds will be converted for DDF requests to TRF)
 - Click the Save button

DISTRICT GRANTS NEXT STEPS

Upload preliminary documents

On the Documents Tab

- Upload the Grant Financial Management Plan
- Upload the applicable Checklist (Local or International)
- Upload the Memorandum of Understanding – Between Club and District
- Upload the Memorandum of Understanding – Cooperating Organizations (if applicable)
- Upload the Exchange Rate Calculator document (for projects in currency other than \$ USD)
- Click the Save button

Click on the Club: Collect Grant Signatures button.

DISTRICT GRANTS

Implementation

- Open Checking Account
- Receive DDF Funds from District
- Implement the Project
- Save and Store all Financial Documents
- Advertise Project
- Collect Pictures on the Work Done

DISTRICT GRANTS IMPLEMENTATION

Open Checking Account

- A Separate Checking Account for the project must be opened.
- Identify a check signer who is not part of the project implementation.
- Do not co-mingle funds from other Rotary activities with these funds.

DISTRICT GRANTS IMPLEMENTATION

Receive DDF Funds from District

- The District Grants Committee will submit a Block Grant Application around May 15th.
- DDF Funds will be requested in \$ USD.
- Block Grant Funds are received from TRF between Jul 15th and Aug 30th.
- District Grant Funds are distributed in \$ USD to the Clubs upon receipt of the funds from TRF.

DISTRICT GRANTS IMPLEMENTATION

Implement the Project

- DO NOT begin the project until Grant Funds are received.

DISTRICT GRANTS IMPLEMENTATION

Save and Store all Financial Documents

- Save electronic copies of all Bank Statements for the Checking Account.
- Save electronic copies of all purchase receipts for budgeted expenses.

DISTRICT GRANTS IMPLEMENTATION

Advertise Project

- Post a project sign (not more than \$1,000) at the project location.
- Contact and coordinate information with local media.
- Post information on the project to social media and websites.

DISTRICT GRANTS IMPLEMENTATION

Document the Record of the Work Done

- Take photographs of the work in progress and the completed project.

DISTRICT GRANTS

Final Steps

- Access the DACdb Grants Module
- Select your Grant form the Club Grants View
- Upload Final Report Documents
- Document Expenses
- Complete your Final Report
- Submit Final Report for Club signatures.

DISTRICT GRANTS IMPLEMENTATION

Access the DACdb Grants Module

- Access DACdb
- Click on the My Clubs tab.
- Click on the Club Grants icon.

DISTRICT GRANTS IMPLEMENTATION

Select your Grant form from the Club Grants View

- Click on Club Grants View
- Click on the pencil edit

DISTRICT GRANTS IMPLEMENTATION

Upload Final Report Documents

- Expenses
- Images

DISTRICT GRANTS IMPLEMENTATION

Complete Final Report Expenses

1. Click on the Expenses tab
2. Enter a description for each expense receipt
 - Pencil edit the receipt description
 - Select the receipt image and click save
3. Add check payments made
 - Pencil edit the payment description
 - Upload supporting documents (expense receipt, payment document)

DISTRICT GRANTS IMPLEMENTATION

Complete your Final Report

- Most of the fields are auto-populated.
- Supporting Photos and Documents are uploaded from the Documents tab
- Financial Report is uploaded from the Budget and Expenses tabs.
- Complete Project Description items
 - #2 How Many People Benefited?
 - #4 How Many Rotarians Participated?
 - #5 What did you do?
 - #6 If a cooperating organization was involved, what was its role?

DISTRICT GRANTS IMPLEMENTATION

Submit Final Report for Application of Club signatures.

- Click Save Final Report
- Final Report is reviewed by District Grants Committee

