

# Grant Management Seminar 2025-26



**D5500 Training Assembly in Sierra Vista**

**May 17, 2025**

**DRFC Kristi Halvorson PDG, Saddlebrooke Club**

**AG Joe Puett, Sierra Vista Club**



# WELCOME

How to qualify clubs to receive Rotary Foundation grant funds.

Learn stewardship expectations.

Prepare clubs to implement a “Memorandum of Understanding” and apply for a district grant.

Understand how to successfully manage a global grant.



# Stewardship

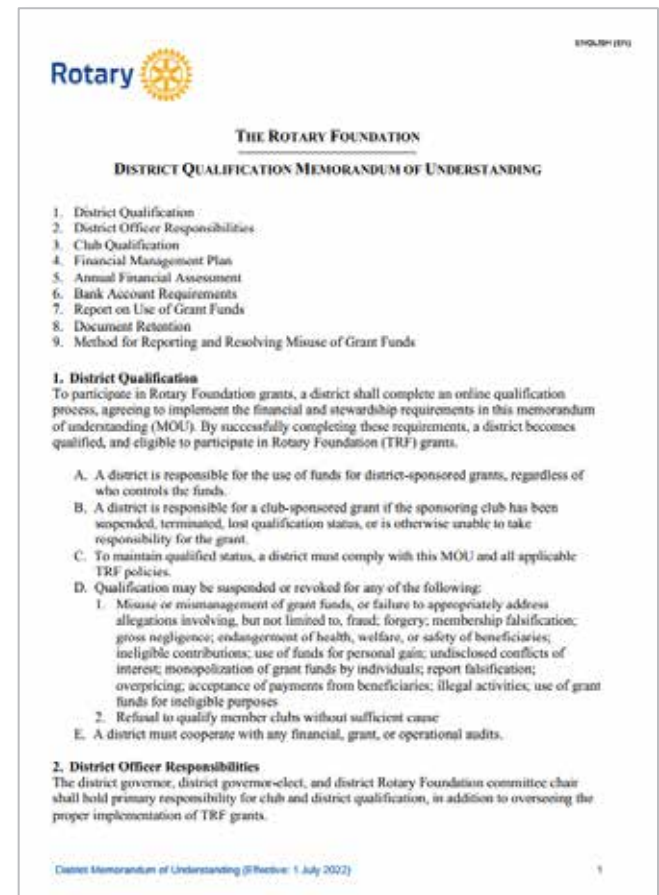


**DRFC Kristi Halvorson filling in for  
2025-26 Stewardship Chair: Teree Bergman**

# DISTRICT QUALIFICATION

4

- District leaders complete the qualification process online each year.
- They agree to implement the Memorandum of Understanding.
- They conduct Grant Management Seminars for clubs.



# CLUB QUALIFICATION

5

## To Use DDF (District Designated Funds):

Clubs must qualify annually:

- **Two members attend** Grant Management Webinar
- Club agrees and president & president-elect submits an acknowledged MOU
- Club is current on RI and District Dues
- Club president attended PETS
- Must have a club TRF Chair

# MOU (Memorandum of Understanding)

**District Grants: MOU is Part of the Grant Application**

**Global Grants: MOU is on the Global Grant Webpage**

## DISTRICT GRANT MEMORANDUM OF UNDERSTANDING



AS PRESIDENT AND PRESIDENT ELECT OF MY ROTARY CLUB,  
WE AGREE TO THE FOLLOWING:

### Club Qualification: To participate in Rotary Foundation District Grants, the club must:

1. Agree to adhere to fund management and stewardship guidelines that insures the use and management of the grant funds meet audit and fiduciary requirements as set out in the *Terms and Conditions for Rotary Foundation District Grants and Global Grants* and as outlined in the *District 5500 Grant Policy*.
2. Assume responsibility for the use of funds for club-sponsored grants, regardless of who controls the funds.
3. Cooperate with any financial, grant, or operational audits.
4. Be current on all financial obligations with District 5500 and with Rotary International (RI), any grant reporting requirements with the District and RI, and tax reporting requirements with the IRS.

### To maintain qualification the club must:

1. Complete the qualifications requirements annually (GMS training, MOU and Addendum).
2. Comply with this MOU, any additional district requirements, and all applicable TRF policies.

Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud, forgery, membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; and use of grant funds for ineligible purposes.

### Club Officer Responsibilities: The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants. Those responsibilities include:

1. Appointing at least one club member to implement, manage, and maintain club qualification
2. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices
3. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest
4. Reporting any actual or perceived conflict of interest to the District

### Report on Use of Grant Funds and Document Retention: The club must adhere to all RI reporting requirements to include:

1. Completion of Final Report
2. Submission of proof of expenditure of funds to include actual receipts, copy of cancelled check, or recipient acknowledgment letter with details of contribution
3. Retention of grant documents for a minimum of five years, or longer as required by local law.

**Reporting Misuse of Grant Funds: The club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the club that does not tolerate the misuse of grant funds.**

### 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 The Rotary Foundation grant funds. By authorizing this document in the DACdb grant module, the club agrees to comply with all of the conditions and requirements of the MOU.*

*On behalf of our Rotary Club in District 5500, Southern Arizona, the 2024-25 President and President Elect agree to comply with all of the conditions and requirements of the MOU for this Rotary year and will notify District 5500 of any changes or revisions to club policies and procedures related to these requirements.*

## District 5500 Addendum to the MOU

### DISTRICT 5500 GRANT CLUB PRESIDENT CERTIFICATION FORM

**2024-2025**

Rotary club:

Club President  
Initials

Our club agrees to all the terms of The Rotary Foundation *Club Qualification Memorandum of Understanding (MOU)*

Two members of our Club have viewed the Grant Management Seminar in its entirety. Those members are:

1.

2.

Name of our club's designated Rotary Foundation Chair is:

The undersigned President confirms that all information contained in the District Grant Application:

Is true and accurate to the best of their knowledge;

That the club has agreed to undertake this project as an activity of the Rotary club;

That the club will comply with the required reporting and financial responsibilities outlined in this Application and The Rotary Foundation's *Terms and Conditions for Rotary Foundation District Grants*;

That a complete Final Report will be provided within 60 days of project completion and not later than May 1st. In the event the project is not completed by May 1st, a Progress Report will be filed along with a written request for an extension to a date certain.

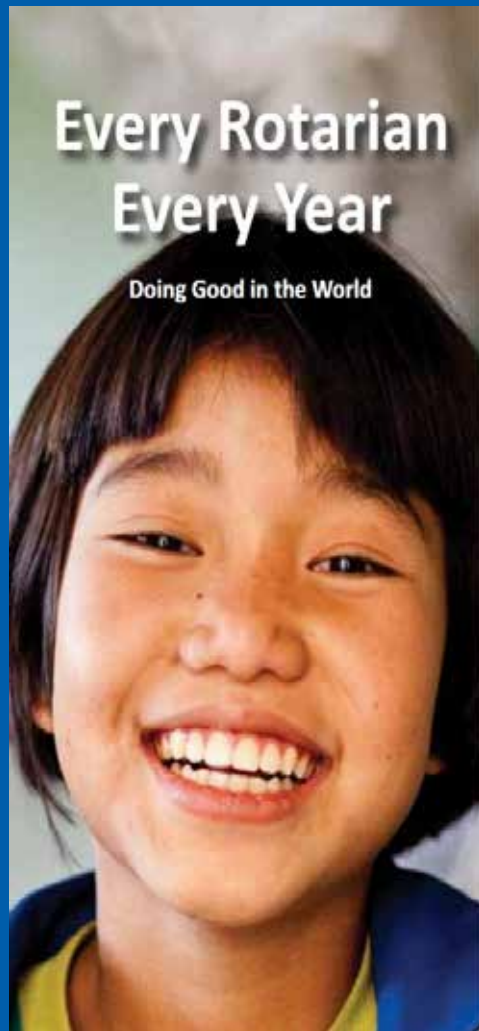


# Memorandum of Understanding Contents

- **Taking responsibility for the proper use of grant funds;**
- **Cooperating with all audits;**
- **Disclosing all potential Conflicts of Interest;**
- **And Agreeing to Timely Grant Reporting.**



# The Rotary Foundation Funds



**Annual  
Fund/SHARE**



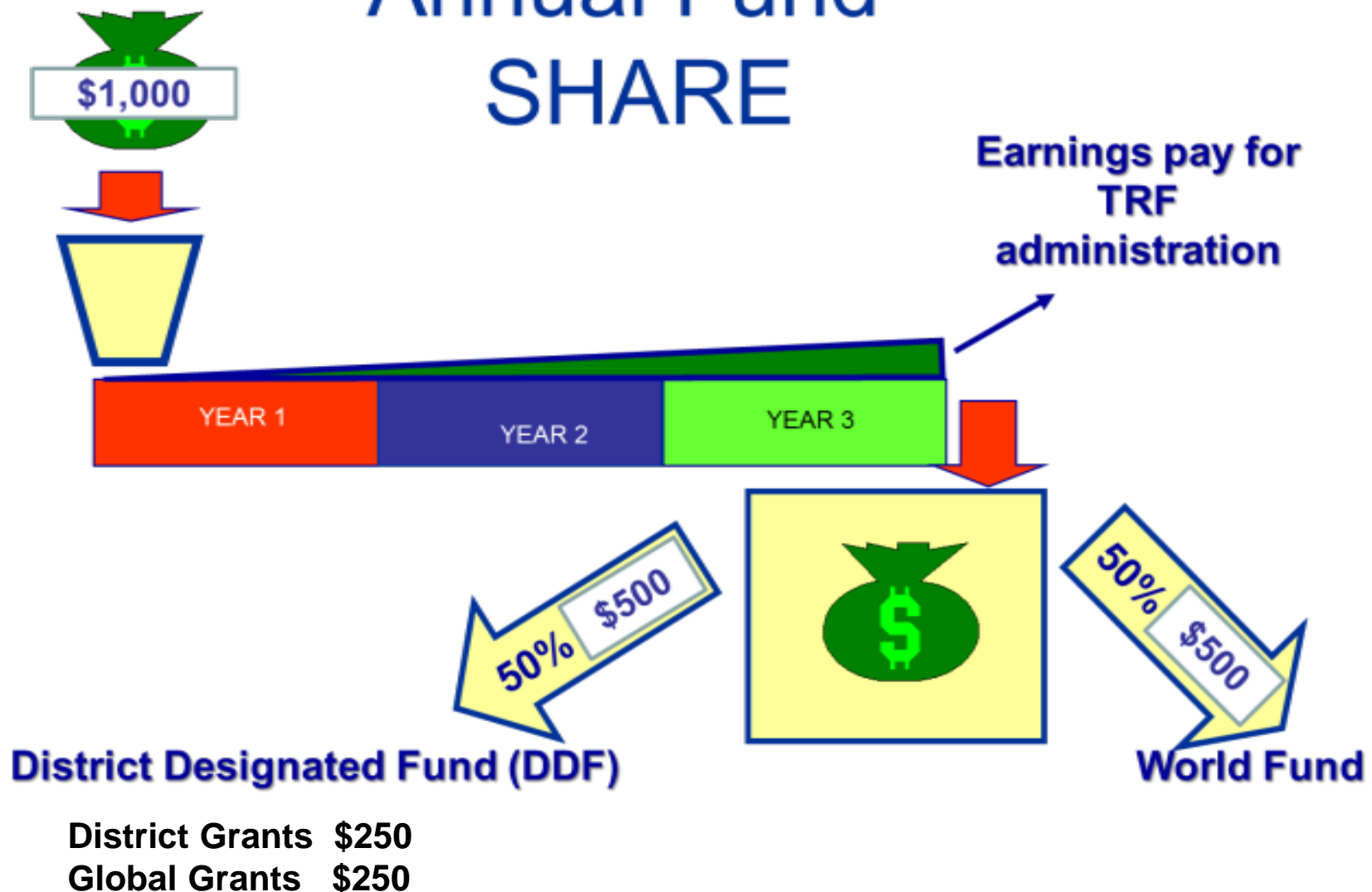
**PolioPlus Fund**



**Endowment Fund**



# Annual Fund-SHARE





# District Designated Funds (DDF)

2025-26

Annual Fund/SHARE Contributions 2022-23

**\$271,148**

50%



**SHARE**



50%

**District Designated Funds**

**TRF World Fund**

**\$ 135,574**

**\$ 135,574**

50 %

50 %

80 % match

**\$ 67,787**

**\$ 67,787**

**District Grants**

**Global Grants**



**Global Grants**





# Stewardship Elements

## **Responsible Management & Oversight of Funds**

- Your club is qualified to use grant funds;
- All activities are documented;
- Financial records are retained;
- Any misuse of funds are reported to the District;
- Projects are implemented as approved; and
- Your club adheres to all RI reporting requirements.



# Record Keeping and Retention

Records must be retained for 5 years

- Ø MOU
- Ø Project Needs Assessment (global grants)
- Ø Beneficiary Information
- Ø Letters of Agreement
- Ø Income and Expense Ledgers
- Ø Bank Statements (global grants)
- Ø Record of Funds Transfers (global and international grants)

NOTE: District Grants will be retained in DACdb

# For Information or Help

## rotaryd5500.org: CLUB QUALIFICATION



District 5500 has adopted policies for club qualification to apply for Foundation grants. These policies apply to both District Grants and Global Grants.

### Club Qualification Requirements

A summary of these requirements includes:

**Grant Management Seminar.** At least two club members must complete the D5500 Grants Management Webinar (GMW) and report completion to their Club President. The contact person on a District Grant must take the Grant Management Webinar, and may be considered one of the two required members.

**Good Standing.** Your Rotary club must be in "good standing." That is, the Club has no outstanding indebtedness to Rotary International or to District 5500, AND, in the preceding Rotary year, the Club President-Elect attended an approved President-Elect Training Seminar (PETS).

**Memorandum of Understanding (MOU) and District 5500 Addendum to the MOU.** The Club President and the President-Elect serving in the year of the district grant fund request must agree to the terms of the Memorandum of Understanding between RI and a D5500 Rotary Club (MOU) when a district grant is awarded from the DACB but not outside. The MOU is published on the DACB.



To watch the Video of the 2024-2025 District Grant Management Seminar click above.



# District Grants



**DRFC Kristi Halvorson filling in for  
2025-26 District Grant Chair: Audrey Tolouian**



# District Grants

- Small-scale, short-term club projects;
- Club must be certified to participate (MOU and Grant Management training);
- Any District Grant from the prior year must have the Final Report approved;
- Clubs are limited to one District Grant at a time.
- Must have active Club and Rotarian involvement in planning and execution of a project;





# District Grants

- Grants may be used for a recurring club project, if the beneficiaries are new.
- Requires Rotary promotion of some sort on the project.
- May not be used to fund vocational training teams, microcredit, or scholarships.
- Can be used for local or international projects. Extra documentation is required for an international project (form in grant module & District Grant Webpage).
- May not simply write a club check to another organization.



# 2024-25 DISTRICT GRANT EXAMPLES

1  
7

Rio Rico	Rio Rico Rotary Walking Trail Benches	1,000.00
SaddleBrooke	Low Income Senior Christmas Party	2,500.00
Sahuarita	Books for Kinders in English & Spanish	2,500.00
Sierra Vista	Research Books for Students	2,177.51
Sierra Vista Sunrise	Sierra Vista Heartland Trial Project	4,000.00



# Data and Club Data Base



Data and Club Data Base

# Grant Application

Club leadership: Click on My Club tab, Click on CLUB GRANTS Icon

The screenshot shows the Rotary District 5500 - SaddleBrooke website. The top navigation bar includes links for Home, Find, My DATA, My CLUB, DISTRICT, Support / Learning, and Admin. The My CLUB tab is selected. On the left, the MY CLUB NAVIGATION menu is expanded, showing options like My Club Members, Member Cards, Member DIRectory, Club Leadership History, New Member Form, Admin Functions, Club Setup, and Help Functions. The main content area displays the SADDLEBROOKE CLUB FUNCTIONS (#50605) grid. A tooltip indicates that the top 6 functions will appear on the CLUB Shortcuts menu. The grid contains icons for Find Member, Members, AREA, Calendar, Club Bulletins, Club Finance, Club FILES, Information, Club Committees, Engagement (w/ Attendance), Club ezStory, and Club Grants.

Club leadership: Click on Club Signatures under Admin

For help, click on Getting Started Videos for Grant Application or Final Report.

The screenshot shows the GRANT NAVIGATION menu. It includes links for Grant Overview, Budget Overview, Grant Dashboard, District Grant View, AREA Grant View, Club Grants View, Grant Secure Files, Admin, Club Signatures, Help, Getting Started Videos, Grant Application and Final Report.

# Club Signatures

Move your signatures from the left to the right – remember signatures must be added before you can enter an application

The screenshot shows a web browser window with the DACdb.com website. The page title is "SaddleBrooke Club Grant Signatures: [2023-24]". The user is logged in as "Halvorson, Kristi Ann". The page displays the "Authorized Club Signatures for: 2023-24" section. A summary states: "A summary of the Club Signatures approvals is shown below." Below this, there is a dropdown menu for "Number of Club Signatures Required:" set to "1", with a note: "The District requires a minimum of 1 club signatures." The page also includes a "Change OrgYear" button and a "Save" button. A section titled "Club Signatures Configuration:" contains two checkboxes: "Include District Members" (unchecked) and "Add by Leadership Role (ex. P,T,S)" (unchecked). The main content area is divided into two columns: "Members NOT on list:" and "Members with Club signature permission:". The "Members NOT on list:" column contains a list of names, with "Guyton, Wendy Kaye (SaddleBrooke)" highlighted. The "Members with Club signature permission:" column contains a list of names, with "Halvorson, Kristi Ann (SaddleBrooke)" listed. Navigation buttons (">>>>", "<<<", and "<<< All") are located between the two columns. The left sidebar shows the "GRANT NAVIGATION" menu with options like "Grant Overview", "Budget Overview", "Grant Dashboard", "District Grant View", "AREA Grant View", "Club Grants View", "Grant Secure Files", "Admin", "Club Signatures", "Help", "Getting Started Videos", "Grant Application and Final Report", "My CLUB Shortcuts", and "DISTRICT Shortcuts". The bottom of the screen shows the Windows taskbar with various application icons and the system clock displaying "1:40 PM 5/12/2024".

Rotary District 5500 - SaddleBrooke

Halvorson, Kristi Ann

**GRANT NAVIGATION**

- Grant Overview
- Budget Overview
- Grant Dashboard
- District Grant View
- AREA Grant View
- Club Grants View
- Grant Secure Files
- Admin
  - Club Signatures
- Help
- Getting Started Videos
- Grant Application and Final Report
- My CLUB Shortcuts
- DISTRICT Shortcuts

**SaddleBrooke Club Grant Signatures: [2023-24]**

Authorized Club Signatures for: 2023-24:

A summary of the Club Signatures approvals is shown below.

Number of Club Signatures Required: 1 The District requires a minimum of 1 club signatures.

Change OrgYear Save

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.

Club Signatures Configuration: ☐ Include District Members ☐ Add by Leadership Role (ex. P,T,S)

**Members NOT on list:**

- Drake, Linda (SaddleBrooke)
- Faller, Rudi (SaddleBrooke)
- Fraioli, Gail (SaddleBrooke)
- Fraioli, Thomas (SaddleBrooke)
- Gallipeo, Michael L (SaddleBrooke)
- Gallipeo, Sloan (SaddleBrooke)
- Gordon, Keith (SaddleBrooke)
- Guyton, Joseph Jr. (SaddleBrooke)
- Guyton, Wendy Kaye (SaddleBrooke)**
- Harn, Wendy W. (SaddleBrooke)
- Hawkins, Leslie (SaddleBrooke)
- Herr, Paul C. (SaddleBrooke)

>>>

<<<

<<< All

**Members with Club signature permission:**

- Halvorson, Kristi Ann (SaddleBrooke)

# CLUB GRANTS VIEW: New Grant Request

#1 Click on New Club Grant Request – Click Here to Create Grant

#2 Make sure you are in correct year. If not, click on Change Org Year

The screenshot shows the Rotary District 5500 - SaddleBrooke Club Grants page for the 2023-24 OrgYear. The page has a blue header with navigation links: Home, Find, My DATA, My CLUB, DISTRICT, Support / Learning, and Admin. The user is logged in as Halvorson, Kristi Ann. The main content area is titled "Club SaddleBrooke Grants [2023-24]" and includes a search bar and a summary of grants. A table lists grants with columns: Action, Project Name, Proj No, Club, Status, Requested DDF, Approved DDF, Other Funding, and Total Project Budget. The table shows "No Grants found in 2023-24 OrgYear".

Rotary District 5500 - SaddleBrooke

Halvorson, Kristi Ann

GRANT NAVIGATION

- Grant Overview
- Budget Overview
- Grant Dashboard
- District Grant View
- AREA Grant View
- Club Grants View
- Grant Secure Files
- Admin
- Help

Getting Started Videos

- Grant Application and Final Report

My CLUB Shortcuts

DISTRICT Shortcuts

Club SaddleBrooke Grants [2023-24]

search..

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.

#1 New Club Grant Request - Click Here to Create Grant

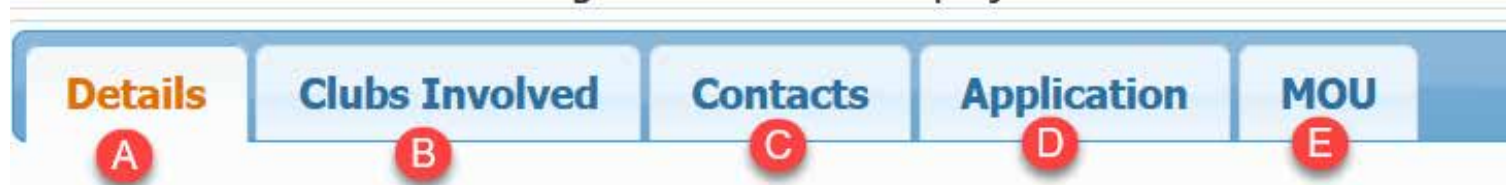
# Change OrgYear

Action	Project Name	Proj No	Club	Status	Requested DDF	Approved DDF	Other Funding	Total Project Budget
No Grants found in 2023-24 OrgYear								

# Grant Application

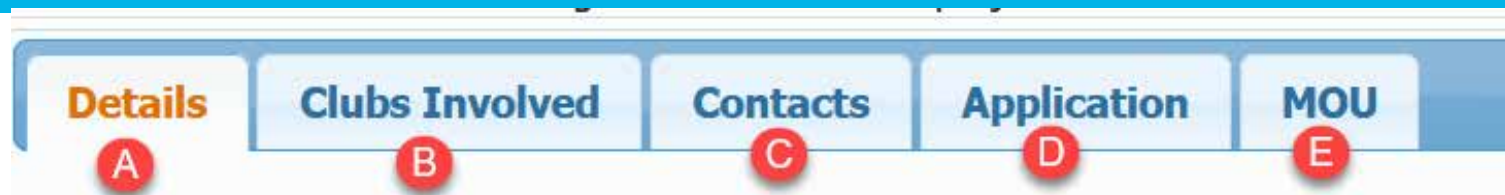
You now see several tabs

- A. Details
- B. Clubs Involved
- C. Contacts
- D. Application
- E. MOU





# A. Details



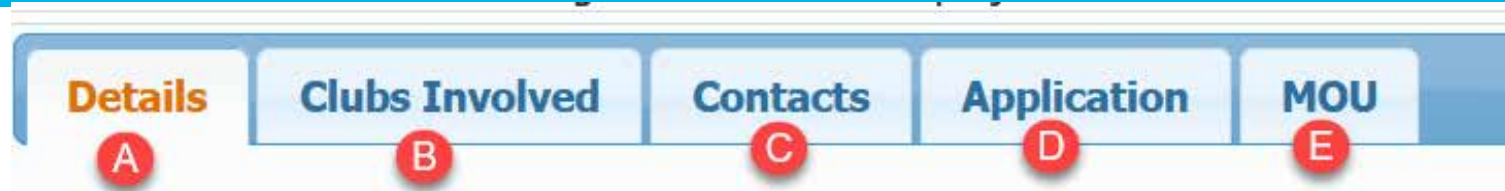
Complete the basic Grant information form below. All the fields on this page must be entered. Once the Grant is saved, the Budget and Document tabs will appear.

* Project Name:	<b>Backpack for Weekends</b>
Priority:	Medium <input type="button" value="v"/>
* Project Org Year: 0	<b>2023-24</b> <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="Hollywood"/>
* State:	<input type="text" value="CA"/>
* Country:	<input type="text" value="US"/>

- Area of Focus:
- ☐ Promoting Peace
  - ☐ Fighting Disease
  - ☐ Promoting Clean Water, Sanitation and Hygiene
  - ☐ Saving Mothers and Children
  - ☒ Supporting Education
  - ☐ Growing Local Economies
  - ☐ Supporting Environment
  - ☐ COVID-19
  - ☐ Disaster Relief
  - ☐ Other:

\* Project Description: Backpack for middle school weekend supplies

## B. Clubs Involved



B. Clubs Involved Tab – If more than one club is involved move them from left to right. You will be lead club – remember to save

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.

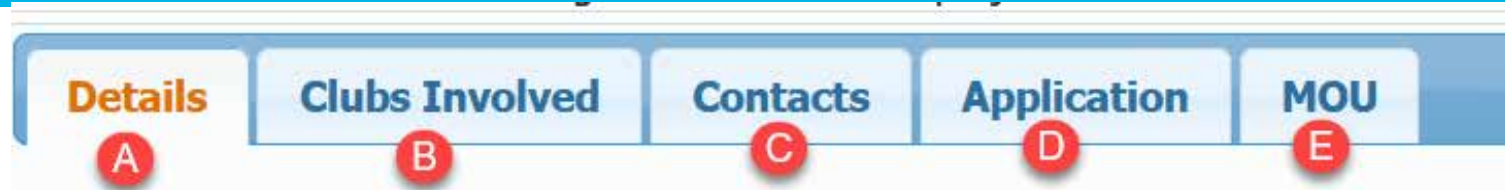
\* Primary Club: Hollywood ▾

\*Clubs Involved:

Club List	Clubs Involved
Bank Masters - Test (9999)	Hollywood (99969889)
Butter Ball - Test (99012205)	Cambio - Test (99012207)
Cant Delete these people (999703501)	
d6710 Jefferson copy for holding dup dues (999703472)	
DaCdb Development Test (99012208)	
DaCdb Support (999800132)	

>>

# C. Contacts



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:	<input type="checkbox"/> Include District Members
Aniston, Jennifer L (Hollywood)	
Baba, Ali (Hollywood)	
Barrymore, Drew (Hollywood)	
Brosnan, Pierce (Hollywood)	
Brous, Steve (Hollywood)	
Cage, Nicolas (Hollywood)	
Chastain, Jessica (Hollywood)	
Craig, Daniel (Hollywood)	
Cruise, Tom (Hollywood)	
Damon, Matt (Hollywood)	

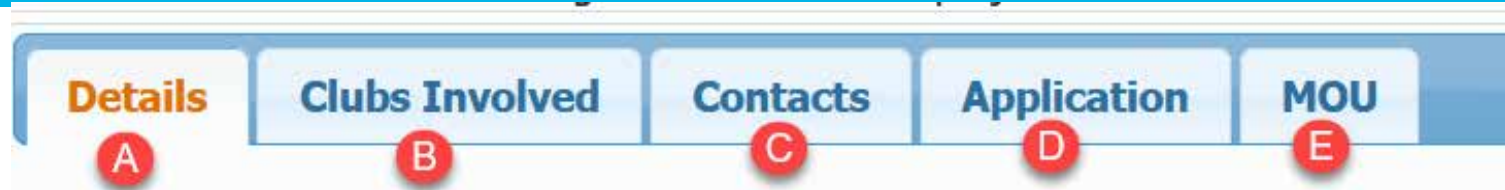
>>

<<

<< All

Members on Contact List:
Flay, Bobby

# D. Application



## Project Definition

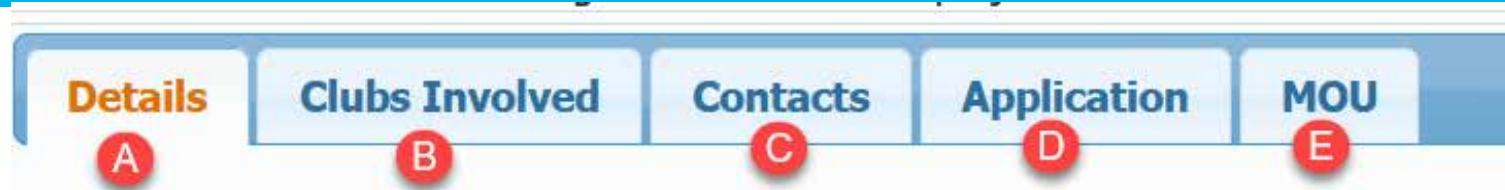
\*Describe the project objectives.

Backpack weekend project. We will fill backpacks on Thursdays to be delivered to the middle school children who may not have meals on the weekends. Include things like macaroni and cheese, peanut butter, cereal and other drink mixes.

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

Lower income children are often left on weekends to tend to themselves and many times do not have meals over the weekend.

# E. MOU



President and President Elect sign the MOU.

**MOU Status:** The District Memorandum of Understanding (MOU) has been uploaded for this Org Year.

**MOU Signatures:**

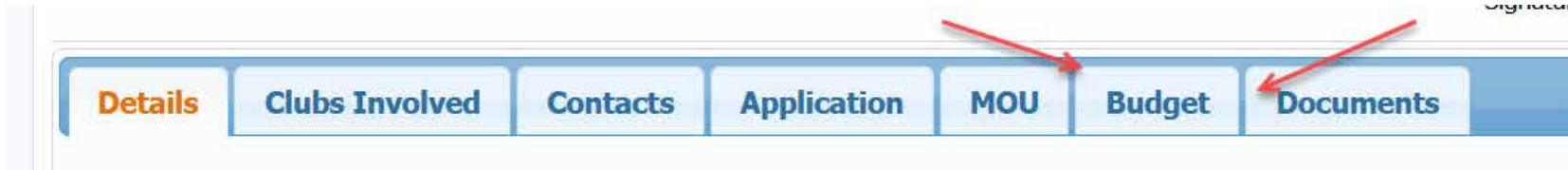
✓	Club	Member	Position	Signature
✓	Hollywood	Bobby Flay	President	**Not Signed**
✓	Hollywood	Audrey Hepburn	President-Elect	**Not Signed**

A red arrow points to a blue button with an envelope icon located to the right of the signature table.



# SAVE APPLICATION: 2 NEW TABS

1. Now **SAVE** your grant application
2. Once you save, there will be two new tabs
  - a. Budget
  - b. Documents



# BUDGET - INCOME

Income – Add your DDF amount , your club's amount and any other income sources

### Add Income Item

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 Request
Club:	Hollywood (99969889) ▾
Amount:	1500.00
Funding Source:	<input checked="" type="radio"/> DDF Requested <input type="radio"/> Other Club Funding

The available DDF funding is shown below:

Club	DDF Alloc	DDF Used*	DDF Avail
Hollywood	0.00	0.00	0.00

[Cancel](#) [Add](#)

### Add Income Source

Modified
ve,
0, Other Funding: \$0.00)



# BUDGET - EXPENSES

## Complete the Budget Expense Tab

**Add Income Item**

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 Request

Club:

Hollywood (99969889) ▾

Amount:

1500.00

Funding Source:

☒ DDF Requested

☐ Other Club Funding

The available DDF funding is shown below:

Club	DDF Alloc	DDF Used*	DDF Avail
Hollywood	n.n0	n.n0	n.n0

Cancel

Add

**Add Income Source**

Modified

VE:

0, Other Funding: \$0.00

Expenses must equal income. When your project is complete, you will enter the actual expenses prior to submitting your final report to the district

### Budget Summary

Description	Amount
Total Income (DDF+Club Funding):	\$2,000.00
Expenses Items:	(\$2,000.00)
<b>Cash Flow (Income - Expense):</b>	<b>\$0.00</b>

# DOCUMENTS

If you have preliminary documents i.e. Cooperating agent letters, budgets, estimated invoices you can upload these to Documents

When project is complete you can add your photos of Rotarian participation under documents

The documents will track your application form and your final report as they are submitted

[Details](#) [Clubs Involved](#) [Contacts](#) [Application](#) [MOU](#) [Budget](#) [Documents](#)

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

 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
		<b>Backup</b>	2023-12-10 15:01:45	0 KB	
 		<b>Documents</b>	2023-12-10 14:44:33	0 KB	
 		<b>Images</b>	2023-12-10 14:44:33	0 KB	
		GrantApplication.html	2023-12-10 15:01:45	9 KB	
 		MOU.pdf	2023-12-10 14:39:33	252 KB	
3 Directories   2 Files			Directory Space Used:	262 KB	

# SIGN GRANT APPLICATION

**Submitted Grant for Club Approval** This Grant is **locked** and you are unable to change the clubs, contact and application in its current state. However, you may continue to add expenses, and elements. Expenses are added from the Club.

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

### 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](#)

Step 9: Final Report Approved

Step 10: Project Complete



# SUBMIT FOR DISTRICT APPROVAL

## Grant Signatures Complete

**ATTENTION:** All required signatures have been applied. If you are ready to submit this Grant for district approval click "Yes" below. Please be sure that:

- 1) The Grant Budget is complete.
- 2) The Grant Application has been completely filled out.

---



**Yes, Submit Grant for District Approval**

**No, Continue to Add Grant Details**

# TWO NEW TABS: SIGNATURE & ACTIVITY LOGS

Details	Clubs Involved	Contacts	Application	MOU	Budget	Expenses	Documents	Activity Log	Signature Log
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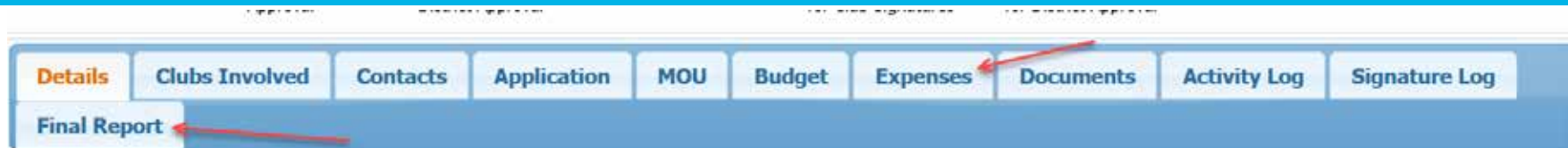
## Activity Log:

Date / Time	User Name	Activity
2023-12-10 15:25:28 PM	Flay, Bobby	Grant was signed by Flay, Bobby, StatusID=3
2023-12-10 15:25:28 PM	Flay, Bobby	Emails were sent to Farrah Fawcett, Pierce Brosnan, Tom Cruise, Matt Damon, Nicolas Cage, John Depp, Drew Barrymore regarding state change to Submitted Grant for District Approval (3)
2023-12-10 15:25:27 PM	Flay, Bobby	Grant status was changed to Submitted Grant for District Approval
2023-12-10 15:23:18 PM	Flay, Bobby	Grant was signed by Flay, Bobby, StatusID=2
2023-12-10 15:15:50 PM	Flay, Bobby	Emails were sent to Farrah Fawcett, Pierce Brosnan, Matt Damon, John Depp, Drew Barrymore regarding state change to Submitted Grant for Club Approval (3)

## Signature Log:

Details	Clubs Involved	Contacts	Application	MOU	Budget	Expenses	Documents	Activity Log	Signature Log
Created Draft Grant									
Club Hollywood Signature									
Flay, Bobby			Administrative			12/10/2023 02:44 PM			
e/Signature			Position			Date			
Submitted Grant for Club Approval									
Submitted By									
Flay, Bobby			President			12/10/2023 03:15 PM			
			Position			Date			
Grant Application Club Signatures									
Club Hollywood Signatures (1 of 1 Received)									
Flay, Bobby			President			12/10/2023 03:23 PM			
e/Signature			Position			Date			
Submitted Grant for District Approval									
Submitted By									
Flay, Bobby			President			12/10/2023 03:25 PM			
			Position			Date			

# AFTER APPROVAL: EXPENSES & FINAL REPORT



## EXPENSE TAB: 1. List Expense Items

The screenshot shows the 'Expenses' tab interface. A modal titled 'Add Expense Item' is open, allowing users to enter expense details. The modal includes fields for Vendor, Ref Num, Amount, and Comments. A red arrow points to the 'Ref Num' field. Below the modal, there is a section for 'Receipt/Payment Supporting Files' with instructions on how to upload documents. Red arrows point to the 'Add' button and the 'Expense Receipt and Payment Upload' section.

**Add Expense Item**

Enter your **Expense Receipts** below. Use the file drag and drop or file upload to save a scanned image of your receipt.

The Refnum is now sequenced automatically with the next number. However, you can overwrite the number with your own reference number.

**Receipt Information:**

\* Vendor:

\* Ref Num:  Receipt No or date mm/dd ( 12 characters max )

\* Amount:  Total Receipt Amount

Comments:

**Receipt/Payment Supporting Files:**

Expense Receipt and Payment Upload: *You will be able to upload a **receipt** document after you save this record. Then pencil edit the record and upload or drag and drop an **receipt** document here. Valid documents are PNG, JPG, GIF, or PDF documents.*

Cancel Add

# EXPENSES TAB: UPLOAD COPIES OF RECEIPTS



2. Now that you saved the expense, click the pencil in front of the expense and upload a copy of the receipt.

The screenshot shows the 'Edit Expense Item: kl = 10737' form. It is divided into two main sections. The left section shows the 'Expense Receipts' table with one entry: Ref # 54322, Vendor Lands End, Amount \$500.00. A red arrow points to a pencil icon in the 'Action' column. Below this is the 'Expense Payments' section, which is empty. The right section is for editing the receipt details. It includes fields for 'Vendor' (Lands End), 'Ref Num' (54322), 'Amount' (500.00), and 'Comments' (Backpack purchase). A red arrow points to the 'Ref Num' field. Below these fields is the 'Receipt/Payment Supporting Files' section. It has a 'Browse' button next to the filename '25059\_Receipt.pdf'. A red arrow points to the 'Browse' button. Below this is a 'Drag and Drop Files Here' area. At the bottom, there is a file preview for '25059\_Receipt.pdf' (Size: 3554 kb, Type: application/pdf) with a green progress bar and a PDF icon. A red arrow points to the 'Save' button at the bottom right.

Step 1: Draft | Step 2: Submitted Grant for Club Approval | Step 3: Submitted Grant for District Approval

Details | Clubs Involved | Contacts | Application | MOU | Budget | Expenses | Documents | Activity Log | Signature Log

Final Report

**Edit Expense Item: kl = 10737**

Enter your **Expense Receipts** below. Use the file drag and drop or file upload to save a scanned image of your receipt.

The Refnum is now sequenced automatically with the next number. However, you can overwrite the number with your own reference number.

**Receipt Information:**

- \* Vendor: Lands End
- \* Ref Num: 54322 Receipt No or date mm/dd ( 12 characters max )
- \* Amount: 500.00 Total Receipt Amount
- Comments: Backpack purchase

**Receipt/Payment Supporting Files:**

Expense Receipt and Payment Uploaded: Browse 25059\_Receipt.pdf

Drag and Drop Files Here

File Name: 25059\_Receipt.pdf  
Size: 3554 kb  
Type: application/pdf  
Uploaded: [Progress Bar]

PDF [Adobe Icon]

Cancel Save



# EXPENSES TAB: ADD COPY OF PAYMENT



3. You can select the receipts you already added from the drop down and upload a copy of the payment/check.

A screenshot of the 'Add Expense Item' form. The form has a sidebar on the left with 'Expense' and 'Action' buttons. The main area contains the following fields and instructions:

- Add Expense Item**
- Enter your **Payment / Reimbursement** for an Expense item below. Select the specific expense receipt you are making this payment for. Use to the file drag and drop or file upload to save a scanned image of your receipt.
- The Refnum is now sequenced automatically with the next number. However, you can overwrite the number with your own reference number.
- Payment Information:**
  - \* Pay To:  (Red arrow points to this field)
  - \* CK/CC No:  Chk# or Last-4 of CC# (DO NOT FILL IN THE FULL CREDIT CARD)
  - \* Amount:
  - \* Receipt Nos:  (Red arrow points to this field)
  - Comments:  (Red arrow points to this field)
- Receipt/Payment Supporting Files:**





Your will be able to upload a **expense** document after you save this record. Then pencil edit the record and upload or drag and drop an **expense** document here. Valid documents are PNG, JPG, GIF, or PDF documents.
- Buttons:   (Red arrow points to the 'Add' button)

# RECEIPTS ARE REFERENCED WITH PAYMENT





Notice how the payments reference the receipts if you select them from the drop down

Details	Clubs Involved	Contacts	Application	MOU	Budget	Expenses	Documents	Activity Log	Signature Log	Final Report
---------	----------------	----------	-------------	-----	--------	----------	-----------	--------------	---------------	--------------

Expense Receipts										+ Add Receipt
Action	Ref	Vendor	Amount	Pay To Ref	Docs	Comments	Created	Modified		
 	54322	Lands End	\$500.00	Lands End \$500.00 (Ref #354)	25059_Receipt.pdf	Backpack purchase	Flay, Bobby 12/11/23 07:48 PM	Flay, Bobby 12/11/23 07:52 PM		
 	54324	Costco	\$500.00	Costco \$500.00 (Ref #5342)		Miscellaneous non-pershables	Flay, Bobby 12/11/23 07:55 PM			
<b>Receipt Total:</b>			<b>\$1,000.00</b>							

Expense Payments										+ Add Payment
Action	CK/CC Number	Paid To	Amount	Receipt Nos	Docs	Comments	Created	Modified		
 	354	Lands End	\$500.00	Lands End \$500.00 (Ref #54322)			Flay, Bobby 12/11/23 07:54 PM	Flay, Bobby 12/11/23 07:57 PM		
 	5342	Costco	\$500.00	Costco \$500.00 (Ref #54324)			Flay, Bobby 12/11/23 07:55 PM			
<b>Payment Total:</b>			<b>\$1,000.00</b>							

Expense Summary	
Description	Amount
Total Receipts:	\$1,000.00
Total Payments:	\$1,000.00
<b>Difference:</b>	<b>\$0.00</b>



# DOCUMENTS TAB: WILL ADD RECEIPTS & PAYMENTS

Your copies of receipts and checks that you entered under Expenses are automatically entered in a folder in Documents under Expenses

DetailsClubs InvolvedContactsApplicationMOUBudgetExpensesDocumentsActivity LogSignature LogFinal Report

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

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 FileAdd Folder

Navigation: Home → Expenses

Action	Type	File Name	Modified	Size	Attributes
		..			
		10737	2023-12-11 19:50:04	0 KB	
		10738	2023-12-11 19:56:25	0 KB	
2 Directories   0 Files			Directory Space Used:	0 KB	

Last updated on: 12/10/23 At: 16:35 By: Cagé, Nicolas Created: 12/10/23 By: Flay, Bobby

# FINAL REPORT

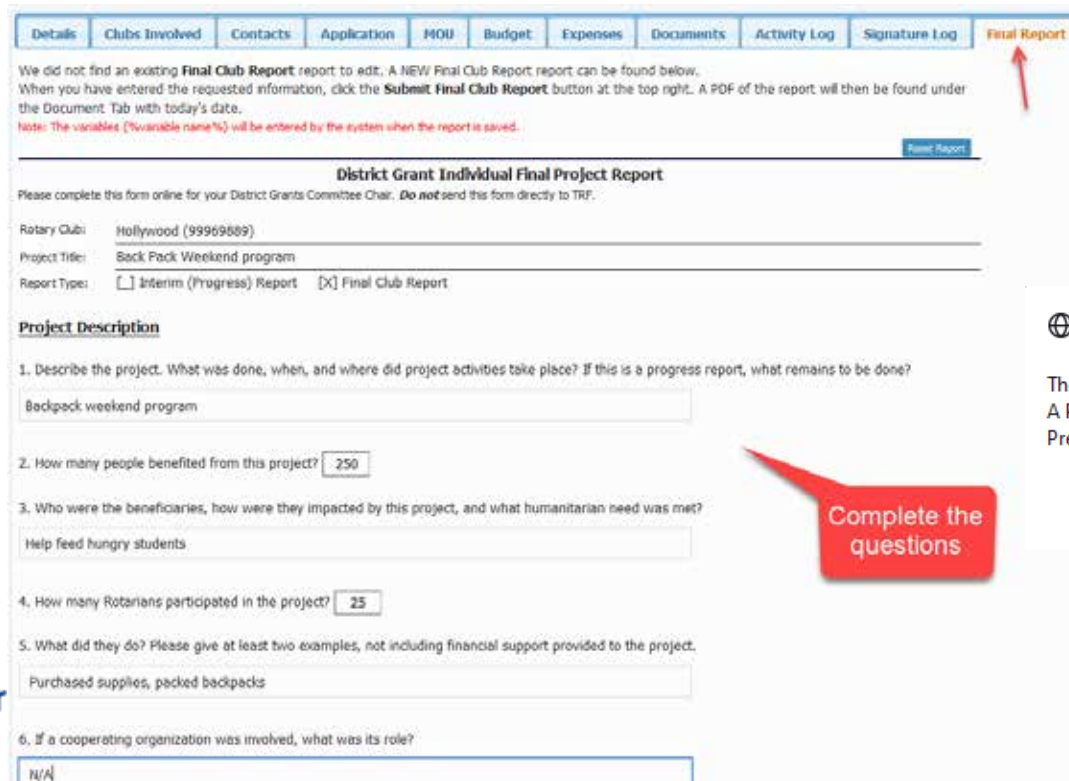


Details Clubs Involved Contacts Application MOU Budget Expenses Documents Activity Log Signature Log

Final Report

Some items will automatically be populated (do not remove the tags)  
**CLICK SAVE**

A message comes up to let you know a copy was saved under the documents tab,  
**CLICK OK**



Details Clubs Involved Contacts Application MOU Budget Expenses Documents Activity Log Signature Log Final Report

We did not find an existing **Final Club Report** report to edit. A NEW Final Club Report report can be found below.  
When you have entered the requested information, click the **Submit Final Club Report** button at the top right. A PDF of the report will then be found under the Document Tab with today's date.  
Note: The variables (%variable name%) will be entered by the system when the report is saved.

**District Grant Individual Final Project Report**

Please complete this form online for your District Grants Committee Chair. **Do not** send this form directly to TRF.

Rotary Club: Hollywood (99969889)  
Project Title: Back Pack Weekend program  
Report Type: ☐ Interim (Progress) Report ☒ Final Club Report

**Project Description**

1. Describe the project. What was done, when, and where did project activities take place? If this is a progress report, what remains to be done?  
Backpack weekend program

2. How many people benefited from this project? 250

3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?  
Help feed hungry students

4. How many Rotarians participated in the project? 25

5. What did they do? Please give at least two examples, not including financial support provided to the project.  
Purchased supplies, packed backpacks

6. If a cooperating organization was involved, what was its role?  
N/A

Save FINAL Report

 www.dacdb.com

The Final Report was saved.  
A PDF of the report can be found under the Document tab.  
Previous versions (if any) can be found in the /backup directory.

Complete the questions

OK

# FINAL REPORT SIGNATURES

Club: Collect FINAL Signatures

Like the application when you first submit, you now must collect Final Signature. Our District will only require one signature.

is **locked** and you are unable to change the information, clubs, contact and application in its current state. However, you is waiting on Club signatures. 0 of 1 Club signatures have now been received. **Additional signatures are required.**

Step 3 Step 4 Step 5 Step 6 Step 7 Step 8

Submitted Grant for District Approval Approved Grant Submitted Final Report for Club Signatures Submitted Final Report for District Approval Final Report Approved Project Complete

Budget Expenses Documents Activity Log Signature Log Final Report

be entered to save the initial Grant application.

### 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
Cage, Nicolas	Hollywood	12/10/2023 03:35 PM
Flay, Bobby	Hollywood	12/10/2023 03:23 PM

Sign Grant Cancel

Club: Sign Final Report

# FINAL REPORT APPROVAL

The District Grant Chair always knows the status of each grant and the stage the grant is in.

All documents, photos, receipts are stored in one place.

DACdb has an excellent automated email system to update the club on the status of their grant.

Club Reporting Process										
	Action	Project Name	Check No	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
<input type="checkbox"/>	    	DACdb University Test Grant Application		16138	Hollywood	Submitted Final Report for Club Signatures	0.00	500.00	500.00	1,000.00
<input type="checkbox"/>	    	Dictionary Project		16202	Hollywood	Submitted Final Report for Club Signatures	0.00	1,000.00	1,000.00	2,000.00
<input type="checkbox"/>	    	Test		16402	Hollywood	Submitted Final Report for Club Signatures	0.00	10.00	10.00	20.00
No Grants: 3							0.00	1,510.00	1,510.00	3,020.00

Completed										
	Action	Project Name	Check No	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other funding	Project Budget
<input type="checkbox"/>	    	Back Pack Weekend program		18041	Hollywood	Final Report Approved	0.00	1,000.00	1,000.00	2,000.00
No Grants: 1							0.00	1,000.00	1,000.00	2,000.00

District Review and Approval										
	Action	Project Name	Check No	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
<input type="checkbox"/>	    	test final report pop up		17948	Hollywood	Submitted Grant for District Approval	0.00	0.00	0.00	0.00
No Grants: 1							0.00	0.00	0.00	0.00



# Applications - How are they Approved?

- First, each Grant Request is reviewed to ensure it meets District Policy;
- District Grant Committee will evaluate each Application;
- If District Grants funds are sufficient, then all applications will be approved.
- If funds are insufficient, projects will be fully or partially funded depending on:
  - contributions the 2 prior years to the Annual Fund
  - compliance of District Grant policies in prior years
- Spending Plan is approved and submitted to RI by August 15.
- District Grant checks should be sent out to clubs before September 1st.

# Global Grants



**AG Joe Puett filling in for  
Barbara Kiernan**

**Grant Subcommittee and Global Grant Chair**



# Global Grants

- Global grants support:
  - a. large international activities with
  - b. sustainable & measurable outcomes
  - c. in one of Rotary's 7 Areas of Focus.
- They also allow clubs & districts in different countries to work together to:
  - a. respond to real community needs
  - b. strengthen our global partnerships

# Types of Global Grants

- **Humanitarian projects**
  - Improving health, sanitation, education etc.  
However, these build capacity – NOT buildings, buying land, or funding another organization's project, for example a UNESCO project).
  - Micro-finance (loans to low-income people)
- **Vocational Training Teams (VTT)**
  - Groups of professionals (Rotarians and non-Rotarians) who travel abroad
    - a. to teach local professionals about their field
    - b. or to learn more about it themselves.

# Finding a GG Project

See Global Grants Page on D5500 Website. Don't Forget:

1. International travel; Club ancestry; Rotary grant websites
2. Project Fairs – like Mexico-USA Friendship Conference in Mexico & D5500's very first International Project Fair on October 18 in Tucson at our District Conference.
3. Upscale smaller international effort. For example:
  - a. Tubac RC – Expanding Cleft Palate/Lip Treatment in Mexico – upscaling from an annual District Grant
  - b. RC of Tucson – Providing vocational training in Senegal – upscaling from donations to school near Dakar

# Let's Begin: Planning

## Clubs Must

1. **Qualify every year:** For example, MOU (part of GG application) & D5500 GMS
2. **Join with a Rotary Club in the host country** interested in doing GG & actively engage with them throughout (visit, zoom, What's App). US is not always International club!
3. **Conduct a community assessment in application:** What is important for them? What are they interested in working on? What is their world view. District Grant can be used here; Good time for site visit
4. **Align project with ONE area of focus** – important because each area has its own application questions and expert reviewers
5. **Develop sustainable project** with partners based on the community assessment.

# Planning (Continued)

6. **Cooperating Agencies:** Find possible project partners in community in addition to Rotary.  
Examples: clinics, schools
7. **Develop budget and identify funding sources** (your club, other clubs, and some level of matching from your district & RI)
8. **Consult D5500's Global Grants (GG) Chair on project & budget.** We will set aside matching funds for you and go over projects with you in personalized GG meeting
- 9 **Complete online GG grant application.**
10. **Draft a one-page executive summary** of project (important for communication and especially fundraising)

The purpose of this Global Grant (#1865425) is to improve the infrastructure of rural healthcare in Mexico by increasing the capacity of public health care facilities, in this case La Clinica Almas A.C. in the town of Alamos (Sonora), to extend medical service, provide training, and support wellness in underserved, marginalized rural communities in that country.

The project encompasses four major components:

- 1) Provide much-needed clinical resources (trained people and equipment) in each of 4 targeted community areas to support wellness, prevent disease, and expedite treatment of injury or illness. The goal is to enable community members to receive immediate care and prevention education for the common challenges threatening the welfare of that particular community. At a minimum, these resources will support a) Rehydration and Sanitation, b) Maternal, Child, Women's Health, c) Quality of Life services (e.g., audiology, vision services), d) Respiratory and Cardiac care, and e) First aid/Trauma.
- 2) Provide professional and vocational field-training to selected individuals in each community who will serve the needs of families in these communities.
- 3) Provide training for all members of each village on how to interact with these resources and maintain their own wellness on a daily basis.
- 4) Provide a cost-effective and sustainable communication system (e.g., telemedicine) that links the medical team at public health clinics with each of these outlying communities.

A long-term goal of this project is to create a sustainable and replicable model of culturally appropriate healthcare that can provide accessible and individualized care in remote communities throughout Mexico.

Rotary International Area of Focus: Disease Prevention & Treatment

The budget is \$115,641; Funds raised to date: \$104,260; Funds still to be raised: \$11,381.

Duration: 2 years (October 2018 – September 2020).

Rotary Partners: Catalina Rotary (Tucson) – International Club; Navojoa – Host Club; Districts 5500, 4100

Supporting Clubs/Districts to date: Mesa West, E Club of the Southwest; Prescott Sunup, Sedona, Peoria North, Tempe South/Districts 4185,5495.



Service area – 219 Square miles  
northeast of Alamos, Sonora,  
Mexico. Seven villages, 1600  
men, women, & children – all  
indigenous Macurawe (Guarijio)  
people of Mexico

# Executive Summary for Global Grant (Sample)

## Benefits:

### Short

### Modifiable

Helps raise funds

Helps inform friends

Quick Reference

# The online application

Based on your planning, develop a written proposal by answering RI's Questions in online application. Cutting & pasting from WORD doc is helpful.

## Application questions ask about:

- Area of Focus
- Rotary & Community Partners (Host & International Club contacts)
- All participant (Community Leaders, Cooperating Agencies) and their responsibilities
- Location of project, demographics of beneficiaries, dates
- Description of project based on community assessment
- Description of goals, objectives, and action steps proposed to carry out project
- Measures & evaluation tools used to document progress, outcomes & sustainability
  - There are Standard Measures (from RI); Additional ones you choose
- Budget linked to goals, objectives, and action steps – check for red flags!

# Funding your GG

D5500 goal: Fund all grants with DDF (District Designated Funds)

1. How to do this:
  - a. D5500 Clubs will donate funds raised for grant to RI Annual Fund
  - b. D5500 replaces your donated funds (\$ for \$) with DDF.
  - c. In addition, D5500 matches 1st \$10,000 at 1.25%
  - d. Currently, RI's World Fund matches all DDF at .80%

**So, DDF dollars are important matches & increase your funding!**

2. Why avoid cash (non-DDF) donations?
  - a. RI will not match cash (non-DDF)
  - b. RI charges 5% to administer them

## Notes

GG have a minimum budget of \$30,000 and a maximum World Fund award of \$400,000.  
There is no minimum World Fund match.

GG must maintain separate bank accounts for funds and retain all records (financial and otherwise) for 5 years.



# Completion of application à Submit!

To develop your online application, go to:

**Rotary.org> my rotary> scroll down to Grant Center > Apply for Grant**

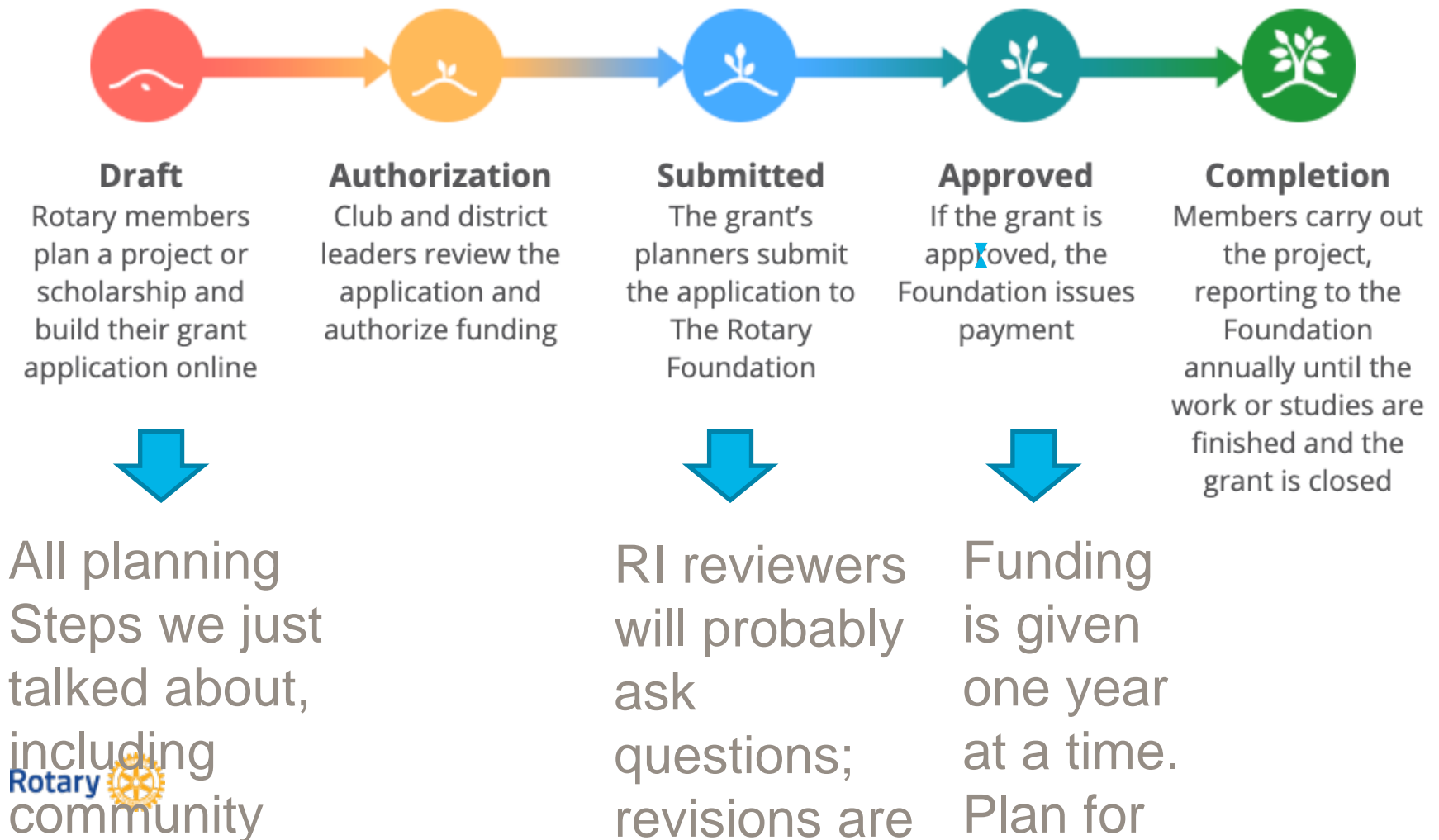
- You can begin writing & editing any time, but before you submit, be sure your club, district, and partners are satisfied with project plan AND you have contacted district about funding.
- Answer every question clearly and concisely. Your regional grants officer will work with you to make any changes your application needs in order to meet grant criteria”.

## Notes:

1. You can contact your Regional Grants Officer from the beginning to introduce yourself. Along the way, you can ask questions, and before submitting, ask him/her to pre-read your answers. This is VERY helpful!
2. To edit your application (once opened), take same routing to Grant Center and then click “My Grants” in top bar. Your application will be with others from D5500.

# Lifecycle of a Global Grant

## The lifecycle of a Rotary grant



# Timeline for Submissions & Reporting

## Submission

- Global Grant applications can be submitted - and are approved on a rolling basis - throughout the Rotary year (July 1 through June 30)
- Best to avoid change of Rotary year (July) due to change in leadership (to sign authorizations).

## Reporting

- Progress reports due within 12 months of first payment – and every 12 months thereafter throughout terms of grant
- Grant recipients need to keep daily logs, progress notes on Standard Measures, justification for changes from the original proposal.
- Final report due within two months of completion

# Time & Commitment

## Time

- Planning and Fund Raising – 12-18 months
- Grant writing – 2-3 months
- Foundation Review and Approval – 1-2 months
- Project execution – typically 2 years

## Commitment

- Primary Contacts from Host & International Clubs
- Committee of three in each club

**Anticipate a fun & meaningful effort!**

# QUESTIONS



*Thank You for all you do  
The Rotary Foundation and  
your community.*