DISTRICT GRANT
Instructions and Worksheet

Rotary — District 6860

Part 1   GRANT SUBMITTAL PROCESS

To get started on your club's District Grant application you will need to attend to a few details:

- Go to the CONTACT tab and identify the **lead** for this project. The lead will be responsible for completing this worksheet and answer any questions that the District Grant Committee might have. As a rule the lead will also complete the application and submit the closing report using the DaCdb Grant Module.
- Identify any other club members who are authorized to enter information. This will also be done in the CONTACT tab.
- Identify the two (2) club officers who will sign this application on-line. One of the officers should be the club president for the year the grant is requested.

Write your answers to the questions on this worksheet. This will make it easier to enter the information in the DaCdb Grant Module.

The Grant Process consists of five steps, with Clubs doing parts 1, 2 and 4 and the District parts 3 and 5.

Part 1
The project lead will complete the project details, application and budget items and identify contacts and signatories.

Part 2
The 2 club officers will log in separately and electronically sign the grant request.

Part 3
The District Grants Subcommittee Chair will perform a preliminary review of the grant request to ensure all necessary information is   provided. If incomplete the subcommittee chair will inform the project lead of the information needed to complete the grant request. All complete grant requests will then be reviewed by the District Grants Subcommittee with final approval by the District Governor. The committee will mark the   grant request as either approved or not, electronically sign the approved grant requests and notify Clubs of their decision.

Part 4
When a Club's project is completed, the project lead will submit a Final report. The Final report will include any details and   outcomes. It will also contain a recap of all expenses, invoices, receipts, cancelled checks and supporting photos. All projects are to be completed within the Rotary year in which the grant is awarded.

Part 5
The District Grants Subcommittee Chair will review a Club's final report. Once the final report is approved, the chair will close the project. When the project close report is   generated, all the approval signatures will appear on the report.

1

Login to DaCdb select GRANTS

Rotary District 6860

ID | Logout
Welcome: Croomes, E. Steven 6860-4

DACdb
District and Club database

Home | My CLUB | My DATA | Committees | PMail ALL | Calendar | DUES | Reports | Speakers | Grants | Club PAGES | Files | Forms | ATTND | AGs | Help

Home | FIND a Member | MAP to CLUBs | GoTo RegisterME | View District NEWSLETTER | View District COMMITTEES | View District LEADERSHIP | View RELEASE NOTES | RI Theme

Dashboard Home | My Club Dashboard | District Dashboard | District Stats | System Dashboard

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2

select CLUB SIGNATURES

District Grant Overview

Grant Secure Files

Club Grants

▼ Admin

Club Signatures

▼ Help

Email District for Help!

District Documentation

Club Documentation

Grant Reports Release Note

District Grants Overview

▽ 12/9/2014 Update: The following changes were made:

- Approximately 20 new Grant variables were added to those that can be included in the notification emails.
- Notification emails were restructred to eliminated duplicate emails that might be sent.

12/7/2014 Update: The following changes were made:

- A Grant Secure Files area was added to Grants. There is a link on the left hand navigation. This is a shared area that all clubs and users can use (and see). This area will not change every OrgYear, and thus will provide an ideal area to store documents like Club MOU's.
- The concept of a Grant Round was added. Each Grant can be associatedd with a Round. If multiple Rounds are found, the option to select which Round will appear.

District Grants:

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:

- All activities funded with district grant funds must adhere to the eligibility requirements set forth in the terms and conditions for Rotary Foundation grants.
- Districts must be qualified by the Foundation to receive district grant funds.

Grants

3 **Select the names of those who will approve the club grant application**	## Madison Club Grant Signature Restrictions 🖨 **Save** Define and configure who can electronically sign-off and approve a District Grant at the Club below. The members list on the right are the ones granted the authority to sign-off and approve a club's District Grant for submission to the District. Before a District Grant can be approved and submitted to the District, it must be electronically signed by the minimum number of members defined below for club-level approval. ✔ It appears that you have defined at a minimum, the required number of Club signatures. **Club Signatures Configuration:** Number of Club Signatures Required: 2 ▾ The District requires a minimum of **2** club signatures. **Authorized Club Signatures:** 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 User List** Allen, John E. (Madison) Alvarez, Peter (Madison) Baum, Stephen J. (Madison) Becker, Larry II (Madison) Berger, Donna J. (Madison) Blackwell, Pamela P (Madison) Brennan, Craig R. (Madison) Brown, Michael A. (Madison) Canale, Jason M (Madison) `>>` `<<` **Club Signature Permission** Klein, Destin J (Madison) Pfeiffer, Eugene H. (Madison) Sanders, Dennis (Madison)
Signature Selection Notes	• Highlight the appropriate name and click the >> button to add names. • 2 Signatures are required. • Approvers are elected officers such as club president, club president-elect. • Because the Grant Module covers multiple years, it is possible that old names will appear. Since District 6860 grants must be closed within one Rotary year, old names should be reviewed and updated as required. • Be sure to click on SAVE.

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select CLUB GRANTS

District Grant Overview

Club Grants

▼ Admin

　Club Signatures

▼ Help

　Email District for Help!

　District Documentation

　Club Documentation

　Grant Reports Release Note

District Grants Overview

Grant Changes

1/25/14 Update: The Grant Module was updated with the following changes:

- Interim and Final Reports:
  - Separated out the reports - there is now an Interim tab and a final report tab.
  - The left side navigation menu was update to reflect two separate reports
  - You can now define an Interim Report and a Final club report -- and they can be different
  - Clicking on the Interim or Final report tab - will start a new report if there is no previous saved copies.
  - Reports are being saved in a way that they can be re-edited - without having to re-enter all the information.
  - There is now a Save Interim Report button (relabeled from Submit Interim Report)
  - There is now a Save Final Report button (relabeled from Submit Final Report)
  - There is a NEW Submit Final Report button. This will promote the Grant to the next state - Final Report Submited
  - Level-7+ users have a new button to reset both the Interim and Final reports (if needed -- for example to use a new template).
- Interim and Final Report Financial Section was formatted a bit better.

5

change ORG YEAR to 2016-17

Club Madison Grants [2015-16]

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 **2014-15** OrgYear

6

Click on NEW GRANT REQUEST

Club Madison Grants [2016-17]

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

Apply Block Grant No   Change OrgYear

No Grants Found

	Action	Project Name	Proj No	Club	Status	Requested DDF	Approved DDF	Other Funding	Total Project Budget

No Grants found in **2016-17** OrgYear

7

Complete the DETAILS tab

Then be sure to click SAVE

Grant Details [2016-17] ID=0

Grant Status: **New Grant Request** (0)
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.

LVL-7: Change Grant Status   **Save**

Details	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:

* Project Priority: Medium

* Project Org Year: 2016-17   (Level-7+ can change the OrgYear, if necessary)

* Grant Round: 1

* Project City:

* Project State:

* Project Country:

*Total Project Budget: 0.00

*Requested DDF: 0.00

Target Completion Date: Target completion date for this project.

*Project Description:

8 **Select The PENCIL to FINISH GRANT REQUEST**	**Club Madison Grants [2016-17]** 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** Other Status | ☐	Action	Project Name ⇔	Proj No ⇔	Lead Club Name ⇔	Status ⇔	Approved DDF ⇔	Requested DDF ⇔	Other Funding ⇔	Project Budget ⇔
---	---	---	---	---	---	---	---	---	---
☐	✏ ✗	Honduras Dental and Vision	1218	Madison	Draft	$0.00	$3,000.00	$2,000.00	$5,000.00
		Grants: 1				**$0.00**	**$3,000.00**	**$2,000.00**	**$5,000.00**	

9 **Complete the CONTACTS tab**	**Grant Status: Draft** (1) 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 / **Contacts** / Application / Budget / Documents Select the members to be included in automatic email updates about this grant. *Contacts: **Club Members Not Included** LeCroy, Gail J. (Madison) Lemieux, Thomas S. (Madison) Lilienthal, Morris H. (Madison) Luttrell, F. Alex III (Madison) McIntosh, Emily H. (Madison) McMicken, Timothy E. (Madison) Montgomery, Gerry L (Madison) Morris, Karen (Madison) Muncey, Larry R. (Madison) Nash-Stevenson, Shelia K. (Madison) O'Donnell, John (Madison) Orr, Clinton R (Madison) Overcash, Deborah M. (Madison) Parker, Thomas E. (Madison) Patel, Sandeep K (Madison) Perkins, David E (Madison) Potter, Dwight (Madison) Rainer, Stefan (Madison) **>>** **<<** **<< All** **Club Members Involved** Klein, Destin J (Madison) Pfeiffer, Eugene H. (Madison) Sanders, Dennis (Madison)

Contacts Notes	- These are your members and members of other clubs that can be contacted by the District Grants Committee if questions need to be answered. - These contacts will have access to reviewing this Grant request. These members will need at least a level 2 access. By default club officers have a level 4 access and club committee chairs have a level 2 access. - Highlight the appropriate name and click the >> button to add names. - One of the contacts must have attended either a District Grant Club Qualification Seminar or Grant Management Seminar for the year the grant is to be awarded. These are offered in the spring and summer prior to the Rotary year the grant is applied for. - These are NOT necessarily the Approval Signatures.

10

Select APPLICATION tab

Complete all areas

Use this worksheet to enter your responses in the spaces provided

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Edit Grant: Honduras Dental and Vision [2016-17] ID=1218

Grant Status: **Draft** (1)
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 | 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:

To ensure the data that you enter is not lost, please click on SAVE frequently. As a good practice click SAVE as you complete each section.

Project Definitions

1. Describe the project objectives:

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

3. Active Rotarian Involvement: Describe the nonfinancial participation by rotarians in the project. (i.e., The number of and how Rotarians will be participate in the project and describe the activities of those who will participate.)

4. Publicity Plan: How will the general public know this is a rotary sponsored project? Please provide details, e.g., publicity in a newspaper or display of the Rotary wheel and/or club name.

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

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.

11 **Select BUDGET tab**	

11 — Select BUDGET tab

Budget Notes	• It shows a surplus until you enter your expense items. • Use the PENCIL to edit the name of the source and/or the dollar amount. • Click on the *ADD INCOME SOURCE* button to additional income sources, such as other clubs or cooperating organization. • Click the *ADD EXPENSE* button to create your initial budget items. At this stage the planned expenses might be general in nature as you may not have specifics yet. • When you submit your <u>Final Report</u> the amounts entered here will transfer over to the closing reports. You will then edit and/or add your actual expenses amounts on the closing reports.

12 **Select DOCUMENTS tab**	
Document Notes	• This is where you will upload you supporting documentation, invoices, receipts, checks and photos. • All formats are supported. • You will first need to scan your invoices, receipts and checks before uploading.
13 **Select COLLECT CLUB SIGNATURES**	
Notes	Grant Status has now been changed to: **Accepting Club Signatures** (2) This Grant is **locked** and you are unable to save changes in its current state. You may continue to add expenses, upload files and file reports. A PMail will now automatically be sent to those identified on the Club Signature list.

NEXT STEP: Part 2 District Grant - Club Approval Signatures