Quick Guide for the District Grant Process

APPLICATION:

- Identify the club lead responsible for managing the entire grant process. Club lead adds one or two grant assistants as Contacts to be Pmailed.
- Club lead verifies clubs proposed grant project fully meets the funding criteria for Rotary Foundation District Grants. See Terms and Conditions for Rotary Foundation District Grants and Global grants.
- Club lead uses the DACdb Grants module to enter the project information.
- Club lead identifies and adds the two grant signatories in the club (one must be the Club President for the year of the grant).
- Club lead ensures that the start and completion dates and funding request amounts are consistent across the DETAILS, APPLICATION and BUDGET tabs.
- Club lead ensures that all sections of the Project Definitions in the APPLICATION tab are completed and that the two boxes for Club Statement of Agreement and The Rotary Foundation (TRF) Policies are checked.
- Club lead ensures that Income and Expense sections of the BUDGET tab are accurately entered; in budget summary total expenses equal total income.
- When the application is completed, the Club lead selects the "Club: Collect Grant Signatures" button to collect the two required club signatures.
- Club Signatories use the "Club: Sign Grant Application" button to apply electronic signatures.
- Once the two electronic signatures are completed, Club lead uses the "Submit Grant for District Approval" button to submit the grant application.
- Club lead interacts with the District Grant Subcommittee to achieve approval of the grant application. This interaction may require modifying the grant application and reacquiring signatures.
- District Grant approval process continues with District Grant Subcommittee Chair approval, forward for District Rotary Foundation Coordinator approval, forward for District Governor approval, forward, as block grant, to The Rotary Foundation (TRF) for approval and funding.
- Clubs may not incur grant expenses dated before the grant go-ahead approval date is received from the District Grant Subcommittee Chair.
- Club executes the project.

FINAL REPORT:

- Club lead once more enters the DACdb Grants module FINAL REPORT tab for their grant to describe results and impact of the project.
- Club lead ensures that actual project financial is complete and accurate by capturing actual project funding on the BUDGET tab and expenses along with all supporting documents, including invoices, receipts, cancelled checks, and photos, etc. on the DOCUMENTS tab.
- Club lead uses the SAVE FINAL REPORT button to create a final report PDF file to Documents tab and inspects the file to ensure all information and documentation was included.
- Once the Final Report information is verified, the Club lead selects the "Club: Collect FINAL Signatures" button to collect the two required club signatures, (one must be the Club President for the year in which the grant is awarded).
- Club Signatories use the "Club: Sign Final Report" button to apply electronic signatures.
- Once the two electronic signatures are completed, Club lead uses the "Submit Final Report" button to submit the final report to District for approval. If all district grant funds were not spent on the project, arrangements must be made with the District Grant Subcommittee Chair to remit the fund balance to TRF through District 6860.
- Club lead interacts with the District Grant Subcommittee to achieve approval of the final report. This interaction may require modifying the final report and/or supporting documents. The DOCUMENTS tab can be modified without having to re-sign. Modifying the FINAL REPORT tab, however, will require re-collecting the two signatures.
- Once the Final Report is approved, the DACdb club grant status is marked "Closed".