



District Grant

Final Report Submission and Approval Process



Topics

- Critical dates
- Login to DACdb
- Budget tab
- Documents tab
- Final Report tab
- Signatures
- Final Report Submission
- District Grant Approval

Critical Dates

- Final Reports due 30 days after your Target Completion Date
- Project complete no later than May 15, 2018
- Final report due no later than June 15, 2018

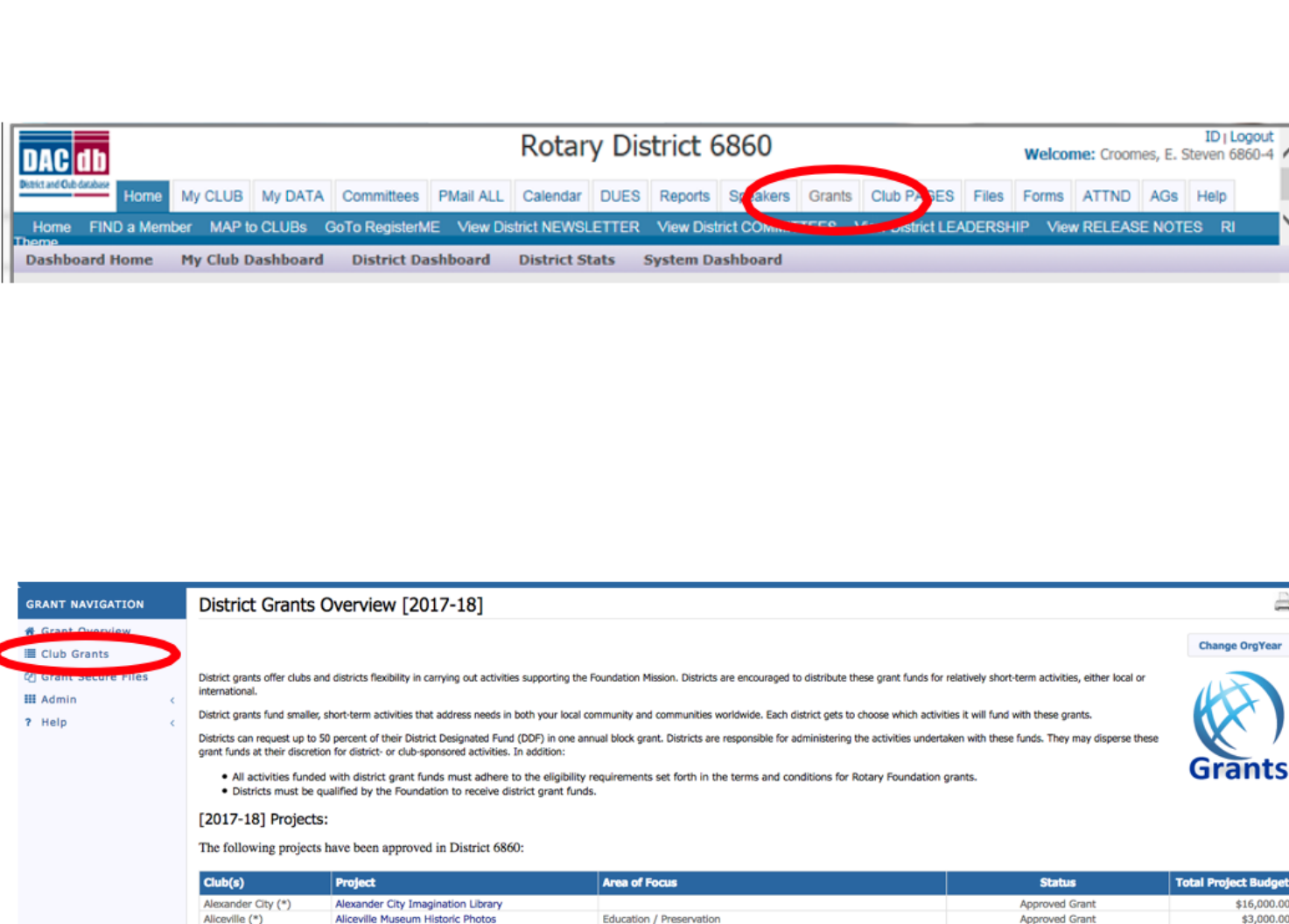
4

Login to DACdb, select the **GRANTS** tab and select **CLUB GRANTS** in the **Grant Navigation** bar.

Login to DaCdb

select GRANTS

Then select Club Grants from the Grant Navigation bar



The screenshot shows the Rotary District 6860 DACdb website. The top navigation bar includes links for Home, My CLUB, My DATA, Committees, PMail ALL, Calendar, DUES, Reports, Speakers, Grants, Club PAGES, Files, Forms, ATTND, AGs, and Help. The 'GRANTS' link is highlighted with a red circle. Below this, a secondary navigation bar shows 'Dashboard Home', 'My Club Dashboard', 'District Dashboard', 'District Stats', and 'System Dashboard'. The 'GRANT NAVIGATION' sidebar on the left lists 'Grant Overview', 'Club Grants', 'Grant Secure Files', 'Admin', and 'Help'. The 'Club Grants' link is highlighted with a red circle. The main content area displays the 'District Grants Overview [2017-18]' page, which includes a 'Change OrgYear' button, a 'Grants' logo, and a table of approved projects for District 6860.

Club(s)	Project	Area of Focus	Status	Total Project Budget
Alexander City (*)	Alexander City Imagination Library		Approved Grant	\$16,000.00
Aliceville (*)	Aliceville Museum Historic Photos	Education / Preservation	Approved Grant	\$3,000.00

Status now
shows
**APPROVED
GRANT**

Click on
PENCIL to
edit

Club Madison Grants [2017-18]





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](#)

Approved									
	Action	Project Name ▾	Proj No ▾	Lead Club Name ▾	Status ▾	Funded Amount ▾	Requested DDF ▾	Other Funding ▾	Project Budget ▾
	 	Sandbox	3696	Madison	Approved Grant	\$0.00	\$4,000.00	\$1,000.00	\$5,000.00
No Grants: 1						\$0.00	\$4,000.00	\$1,000.00	\$5,000.00

Budget Tab

Replace budgeted income and expenses with actual amounts.

Click on BUDGET Tab

Update to show actual amounts

Edit Grant: Sandbox [2017-18] ID=3696

Grant Status: **Approved Grant** (6)
 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. This Grant is **approved**. When the Club is sent their funding check, mark the Grant as Funded.
 The Club needs to complete an Interim and/or Final report as required and submit for Club signatures and then District approval.

Club: Collect FINAL Signatures

Details Contacts Application **Budget** Documents Activity Log Signatures Interim Report Final Report

Income Items

Action	Item Name	Amount	Created	Modified
	Requested DDF Funding	\$4,000.00	Sanders, Dennis 03/27/2017	McMicken, Timothy E. 04/04/2017
	Other Funding Required	\$1,000.00	Sanders, Dennis 03/27/2017	McMicken, Timothy E. 04/04/2017
Income Total:		\$5,000.00		

Expense Items

Action	Item Name	Amount	Created	Modified
	Vision and Dental supplies	\$4,000.00	Sanders, Dennis 03/27/2017	McMicken, Timothy E. 04/04/2017
	Travel support	\$1,000.00	Sanders, Dennis 03/27/2017	McMicken, Timothy E. 04/04/2017
Expense Total:		\$5,000.00		

Cash Analysis

Cash Available : 0 %

Spent Cash : 100 %

In **BUDGET SUMMARY**, make sure Income – Expenses = \$0.00

Budget Summary	
Description	Amount
Total Budget (from Details Tab)	\$6,000.00
Income Items	\$6,000.00
Expenses Items	(\$6,000.00)
Cash Flow (Income - Expense):	\$0.00

Documents Tab



- PAID invoices, receipts, CANCELLED checks, bank statements, photos and/or any other supporting documentation must be captured in digital form.
- Digital documents must be legible and large enough to read.
- Receipts must total up to at least your approved District Grant amount. If not, a refund is required.
- A currency conversion spreadsheet is required for international projects.
- You can add documents at any time.
- When everything is complete SAVE the document one last time.

Click on
DOCUMENTS
Tab

Select folder
and click on
Upload File

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.

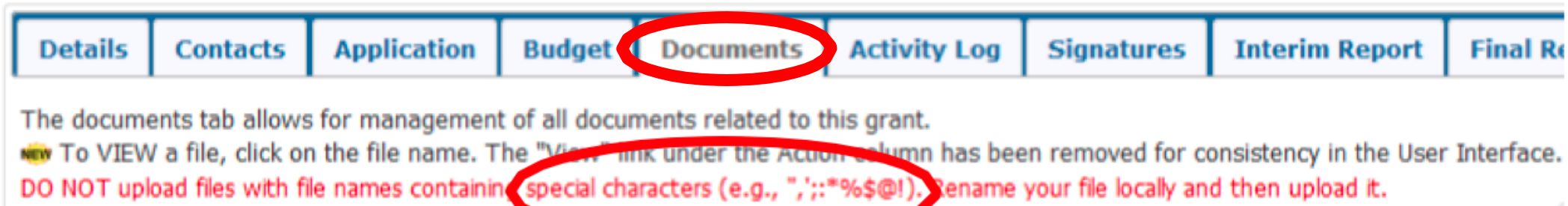
Navigation: Home

Action	Type	File Name	Modified	Size	Attributes
	Folder	Backup	2017-04-04 14:02:34	4 KB	
	Folder	Documents	2017-03-27 17:17:49	0 KB	
	Folder	Images	2017-03-27 17:17:49	0 KB	
	File	GrantApplication.html	2017-04-04 14:02:34	15 KB	
3 Directories 1 File				Directory Space Used:	19 KB

Last updated on: 04/04/2017 At: 13:10 By: Sanders, Dennis Created: 03/27/2017 By: Sanders, Dennis

Note: Place financial documents in HOME folder and photos in IMAGES folder.

Ensure file names are acceptable and files are in correct place



Special characters also include **dashes and underscores**

Hint: Although all **Supporting Documents** can be stored in the default **HOME** folder, we suggest that you insert **Financial Documents** in the **Home** folder and **Photos** in the **Images** folder to keep files better organized.

Final Report Tab

- Address Sections 1 through 6.
- Enter accomplishments and results of your project.
- SAVE often as you fill out these sections.

Click on
FINAL
REPORT Tab

Details	Contacts	Application	Budget	Documents	Activity Log	Signatures	Interim Report	Final Report
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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.

[Reset Report](#)

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: Madison (51965)

Project Title: Sandbox

Report Type: ☒ Final Club Report

- Section 1 should reflect results of the project. (It's OK to copy the Project Description defined in the DETAILS tab and edit or add results at the end.)
- Section 2 – fill in.
- SAVE often as you fill out these sections.

**Sec. 1:
Fill in to
reflect
results of
project.**

**Sec. 2:
Fill in
number**

Project Description

1. Describe the project. What was done, when, and where did project activities take place?

This grant allowed the Madison Rotary club to continue the fourth year of dental care to first through fifth graders and to continue the third year of vision tests for all ages. The dental efforts provided cleanings, sealant, cavity removal/repair as well as extractions when necessary. The dentist also provided toothbrushes, toothpaste, floss and usually a toy for all children. This allowed the children to continue practicing good hygiene throughout the year. The vision team provided basic retinoscopy eye exams to Honduran's of all ages. We brought several hundred pairs of glasses with us which provided an array of options for both near and farsightedness. In addition, we brought sunglasses and taught everyone about the harmful effects of UV rays and how sunglasses can help protect their eyes. Finally, we brought several bottles of antibiotics and synthetic tears which we dispensed to patients who needed them.

2. How many people benefited from this project?

Sec. 3:

**Fill in to
reflect
impact of
project.**

Sec. 4:

**Fill in
number**

Sec. 5:

**Enter the
actual
Rotarian
activity**

Sec. 6

**Fill in only
if you have
one**

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

The Madison Rotary Club optometrist was successful in providing children with basic eye exams and assessing children with the need of glasses. He identified children and adults who have more critical eye conditions that require treatment. This project helped the children of Choluteca in the following ways: Improved their health through better oral hygiene. Instill better oral hygiene habits in families and throughout the community. Provided glasses to improve learning ability and quality of life. Identified eye problems that can be addressed with medication. Identified more serious eye and vision problems that might lead to more in depth treatment.

4. How many Rotarians participated in the project?

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

- (1) Several Madison Rotarians collected donated materials and packed them for shipment to Honduras.
- (2) Rotarian Michael St.Peter coordinated with the Indiana Lions Club to obtain donated eyeglasses and medication.
- (3) Rotarians Michael St.Peter and Tim McMicken ran vision clinics for a week and checked 630 people.
- (4) Rotarian Michael St.Peter recorded names of 20 people needing cataract surgery and coordinated with Choluteca Rotarians to provide these operations free of charge.

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

13

At this point click on **Save FINAL Report** to ensure that all report information is saved.

Edit Grant: Sandbox **[2017-18]** ID=3696

Grant Status: **Approved Grant** (6)
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. This Grant is **approved**. When the Club is sent their funding check, mark the Grant as Funded.
The Club needs to complete an Interim and/or Final report as required and submit for Club signatures and then District approval.

Save FINAL Report Club: Collect FINAL Signatures

Details Contacts Application Budget Documents Activity Log Signatures Interim Report Final Report

Every time the Final Report is saved, a PDF file is created and saved in the DOCUMENTS tab. This file is named “FinalReport-<encoded date_time>.pdf” (e.g., FinalReport-180122_154419.pdf). (Older copies of Final Report files are saved in the Backup sub-folder.)

Review this file to make sure all information has been included.

Looking back at the **FINAL REPORT** tab, you will notice that there are several paragraphs below Section 6. These sections are automatically created by the Grants Module.

Financial information will be inserted from the **BUDGET** tab.

Certifying Signatures will be inserted from the **SIGNATURES** tab.

Supporting Photos will be inserted from the **DOCUMENTS** tab, **Images** folder.

Supporting Documentation will be inserted from folders in the **DOCUMENTS** tab. Supporting documentation consists of files you have uploaded containing items such as bank statements, invoices, receipts, checks, etc.

Once all information and documentation is in place, verified and saved, you are ready to **Collect FINAL Signatures**.

Signatures

Ensure that signers are listed in Admin>Club Signatures list.
Remember to **SAVE** when you're done.



GRANT NAVIGATION

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

Greater Huntsville Club Grant Signatures: [2017-18]

A summary of the Club Signatures approvals is shown below.

[Change Org Year](#) [Save](#)

Club Signatures Configuration:

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

Authorized Club Signatures for 2017-18:

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 type="checkbox"/> Include District Members		Members with Club signature permission:
Abbott, Lisa (Greater Huntsville)	<div>>></div> <div><<</div> <div><< All</div>	Brown, Ronald W. (Greater Huntsville)
Adams, Charles H. (Greater Huntsville)		Qualls, Rodger (Greater Huntsville)
Anderson, Cynthia Holt (Greater Huntsville)		Wainwright, Ronald G. (Greater Huntsville)
Andrew, Gary F. (Greater Huntsville)		
Andrzejewski, Eugene (Greater Huntsville)		
Baker, Lewis Ray (Greater Huntsville)		
Bateman, Randell Bruce (Greater Huntsville)		
Baxter, James T. (Tom) III (Greater Huntsville)		
Belt, Melissa M. (Greater Huntsville)		
Bergantz, Joseph L. (Greater Huntsville)		
Billings, Jay C. (Greater Huntsville)		
Blackwell, Randy (Greater Huntsville)		

- Click on the **Club: Collect FINAL Signatures** box.
- An email will be sent to each person in the **Club Signatures** list.
- Two electronic signatures are required - one must be your 2017-18 Club President.
- The **SIGNATURES** tab is only for review of signature history.

Click on
Club:
Collect
FINAL
Signatures

Note:
Signatures
Tab is only
used to
record
signature
history.

Edit Grant: Sandbox [2017-18] ID=3696

Grant Status: **Approved Grant** (6)
 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. This Grant is **approved**. When the Club is sent their funding check, mark the Grant as Funded.
 The Club needs to complete an Interim and/or Final report as required and submit for Club signatures and then District approval.

[Save FINAL Report](#)
[Club: Collect FINAL Signatures](#)

[Details](#)
[Contacts](#)
[Application](#)
[Budget](#)
[Documents](#)
[Activity Log](#)
[Signatures](#)
[Interim Report](#)
[Final 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 File](#)
[Add Folder](#)

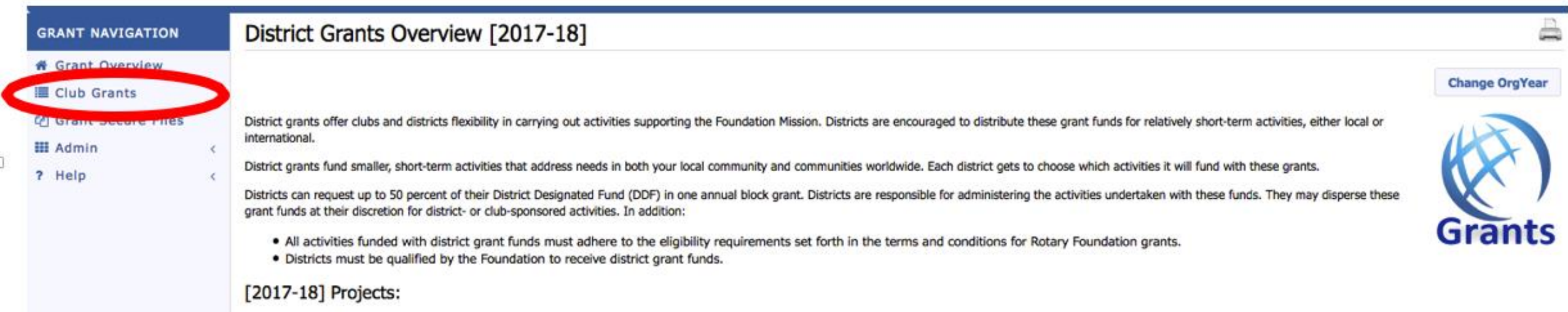
Navigation: [Home](#)

Action	Type	File Name	Modified	Size	Attributes
	Folder	Backup	2017-04-04 16:08:24	4 KB	
	Folder	Documents	2017-03-27 17:17:49	0 KB	
	Folder	Images	2017-03-27 17:17:49	0 KB	
	Folder	Photos	2017-04-04 16:08:23	0 KB	
	File	Dental Supplies.pdf	2017-04-04 16:07:39	11,925 KB	
	File	FinalReport-170404_160824.pdf	2017-04-04 16:08:24	694 KB	
	File	Gas Receipt.jpg	2017-04-04 16:08:23	8 KB	
	File	GrantApplication.html	2017-04-04 14:02:34	15 KB	
	File	Rental Trucks 1.pdf	2017-04-04 16:06:58	9,973 KB	
4 Directories 5 Files			Directory Space Used:		22,618 KB

- 17
- Your 2017-18 Club President and someone else in the Club Signatures list must:
 - Login to DACdb
 - Select the **Grants** tab



- Select **Club Grants** in the Grant Navigation bar.
- (More instructions on the next slide...)




18

- Your 2017-18 Club President and someone else in the Club Signatures list must:

(Continued from previous slide...)

Click on the edit pencil icon beside the grant to be signed

Club Madison Grants [2017-18]



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

Approved

<input type="checkbox"/>	Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
1		Sandbox	3696	Madison	Approved Grant	\$0.00	\$4,000.00	\$1,000.00	\$5,000.00
No Grants: 1						\$0.00	\$4,000.00	\$1,000.00	\$5,000.00

19

- Your 2017-18 Club President and someone else in the Club Signatures list must:
(Continued from previous slide...)

Click on the **Club: Sign Final Report** box

Apply your electronic signature ([see next slide](#))

Check the **Signatures** tab to ensure the signature was recorded

Edit Grant: Sandbox [2017-18] ID=3655

Grant Status: **Submitted Final Report for Club Signatures** (10)

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. The Final report is waiting on Club signatures. 0 of 2 Club signatures have now been received. **Additional signatures are required.**

Club: Sign Final Report

Details **Contacts** **Application** **Budget** **Documents** **Activity Log** **Signatures** **Interim Report** **Final Report**

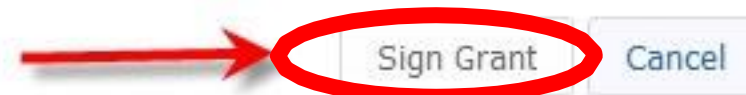
Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

- Click on SIGN GRANT to apply your signature.

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
Dixon, Lee Daniel Jr	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 12:08 PM
Vanasse, Jennifer Hardee	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:10 AM
Smith, Dale	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:59 AM
Abushakra, Michael	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:04 AM
Abushakra, Michael	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 02:23 PM



Final Report Submission

- **Save FINAL Report** so that signatures go into the PDF file.
- Review the Final Report PDF for accuracy and completeness.
- Click on **Submit Final Report**.

After both have signed, review Final Report PDF and then click on **Submit Final Report**

The screenshot shows the 'Edit Grant' interface for a grant named 'Sandbox [2017-18]' with ID 3696. The grant status is 'Submitted Final Report for Club Signatures (10)'. A lock icon and text indicate the grant is 'locked' and cannot be edited. A message states that 2 of 2 club signatures have been received, and the report can now be submitted for district approval. At the top right, there are two buttons: 'Club: Sign Final Report' and 'Submit Final Report'. A red arrow points from the 'Submit Final Report' button in the list above to the 'Submit Final Report' button on the page. Below the buttons is a tabbed interface with tabs for 'Details', 'Contacts', 'Application', 'Budget', 'Documents', 'Activity Log', 'Signatures', 'Interim Report', and 'Final Report'. The 'Details' tab is active, showing a form to complete basic grant information. The form includes a text box for the RI Bock Grant Number, a dropdown for 'Project Name' (set to 'Sandbox'), a dropdown for 'Project Priority' (set to 'Medium'), and a dropdown for 'Project Org Year' (set to '2017-18').

Edit Grant: Sandbox [2017-18] ID=3696

Grant Status: **Submitted Final Report for Club Signatures** (10)

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. The Final report is waiting on Club signatures. 2 of 2 Club signatures have now been received. This report can now be submitted to the District for Approval.

Club: Sign Final Report **Submit Final Report**

Details Contacts Application Budget Documents Activity Log Signatures Interim Report Final Report

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.

This is the RI Bock Grant Number (Simplified Grant Number) issued by RI. The District will enter this.

* Project Name: **Sandbox**

* Project Priority: Medium

* Project Org Year: 10 **2017-18** OrgYear can be changed by District (if needed)

- **Omit this step, and final report goes nowhere!**

What Happens Next?

- After the final report 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 Final Report. This interaction may require modifying the Final report and/or other supporting information and resubmitting the Final Report.
- 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 Final Report is approved, and their grant status will be changed to “Closed”.
- If all approved club district grant funds were not spent on the clubs project, arrangements must be made with the District Grant Subcommittee Chair to remit the grant fund balance to TRF through District 6860.
- Congratulations, a completed and closed District Grant is one of the qualifications for your club to make application for future District Grants.

In Review...

- Critical dates
- Login to DACdb
- Budget tab
- Documents tab
- Final Report tab
- Signatures
- Final Report Submission
- District Grant Approval

Questions?

Resources

- All District Grant related documents are on the District 6860 website at <http://rotary6860.org/foundation.php>.
- This slide show is also on the District 6860 website at the same location.
- This GoToMeeting session will be posted on YouTube, and a link will be provided on the District 6860 website at the same location.