

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 Grants Subcommittee 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 members who will sign this application on-line. One must be the club president for the year the grant is awarded.

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 members 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.

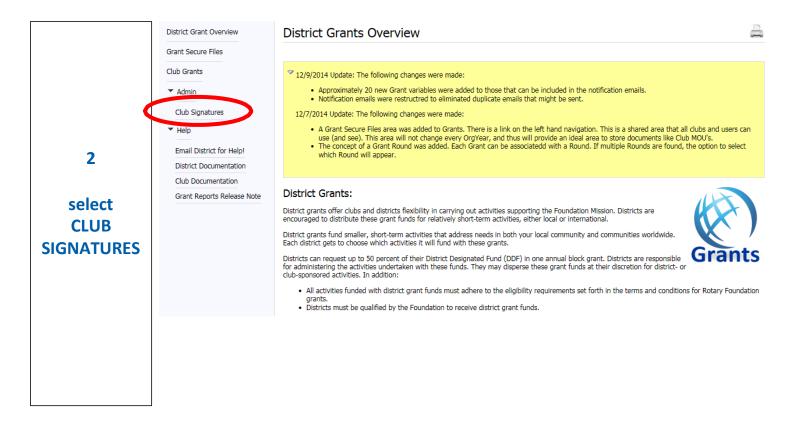
Part 4

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. Final Reports are due within 30 days of project completion. Last Final Report submission date is June 15, 2017. All projects are to be completed within the Rotary year in which the grant is awarded.

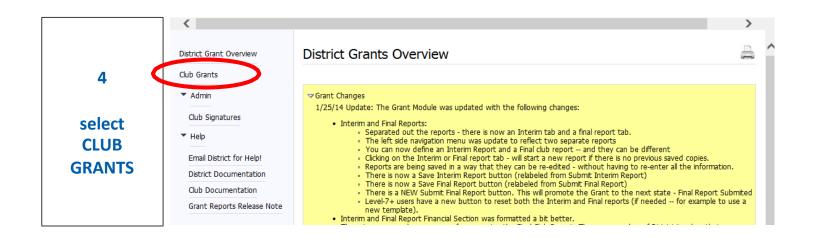
Part 5

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





	Madison Club Grant Signature Re							
3	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 Distict, 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	•					
Select the	Club Signatures Configuration:							
names of those who	Number of Club Signatures Required: 2 - The Dis	trict requires a minimum of 2 club	o signatures.					
vill approve	Authorized Club Signatures:							
the club	This is the list of members that have access to edit (Club L To <i>Grant</i> access, move members from the left to the rigit		ers from the right to the left. Then click the [Save]					
grant	button (above-right) to save your changes.							
application	Club User List		Club Signature Permission					
	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)	▲ ■ >>	Klein, Destin J (Madison) Pfeiffer, Eugene H. (Madison) Sanders, Dennis (Madison)					
	 Highlight the appropriate name ar 2 Signatures are required. 	nd click the >> button to	add names.					
			provident cleat					
Signature	C 1	h as club president, club	 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 undated as required. 					
Signature Selection Notes	 Approvers are elected officers suc Because the Grant Module covers	multiple years, it is poss closed within one Rotar	ible that old names will appear.					

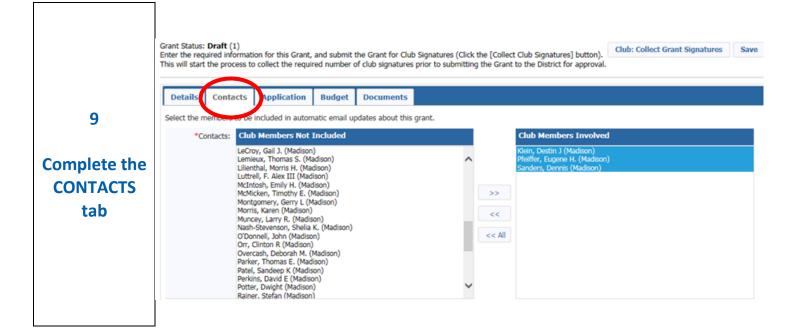






7 Complete	Grant Details [2017-18] 1D=0
the	Grant Status: New Grant Request (0)
DETAILS	Fill out the Grant information shown below. Click "Save" when you are ready. After saving the
tab	initial Grant, the system will assign the RI Project No (GrantID), and will enable the Budget and Document Tabs to allow more detailed Budget information and project file data to be
	entered or uploaded.
	Details Contacts Application
Then	Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application.
be sure to	Once the Grant is saved, the Budget and Document tabs will appear.
click	* Project Name:
	* Project Priority: Medium
SAVE	* Project Org Year: 0 2017-18 Org Year can be changed by District (if needed)
	* Round: 1
	* City:
	* State:
	* Country:
	* Budget: 0.00
	* Requested Funding: 0.00
	Target Completion Date:
	Area of Focus: Project's area of focus (optional) previous entires will appear after typing a couple of characters
	res/EN/account/login scription:

Select The PENCIL	A summary is sl When more that	lison Grants [2017- hown below of all grants submitt n one club is working on togethe w, to fund the Club grant. This w	New Club Gr	New Club Grant Request - Click Here to Create Grant Change OrgYear					
to FINISH	Other Status								
GRANT	ACIN	a serie a series of the series		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	\$5,000.0
REQUEST						\$0.00	\$3,000.00	\$2,000.00	\$5,000.0



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.
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	Edit Grant: Honduras Dental and Vision [2017-18] 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.
10	Details Contacts Application Budget Documents
Select	Fill out the detailed grant application form below. Grant Timeframe
APPLICATION tab	*Start Date:
	Address To Mail Grant Payment
Complete all	"Name:
areas	*Address:
	*City:
Use this	"State:
worksheet to	*Zipcode:
enter your	
responses in the	
spaces provided	
	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.



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.

Questions 1-4 must be completed

Use this worksheet to enter your responses in the spaces provided 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.

Be sure to read and accept these terms and conditions.

Complete this

only if

applicable

Use this worksheet to enter your responses in the spaces provided 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.

	Income	Itoms			Add Income Source	
	Action	Item Name	Amount	Created	Modified	Surplus: \$5,000.00
	2×	Requested DDF Funding	\$3,000.00	Croomes, E. Steven		Cook Analysia
	2 🗙	Other Funding Required	\$2,000.00	01/02/15 Croomes, E. Steven 01/02/15		Spent Cash Analysis ر م Spent Cash : ۰ %
		Income Total:	\$5,000.00	01/02/15		
	Expense	Items			Add Expense	
	Action	Item Name	Amount	Created	Modified	
11		Expense Total:	\$0.00			
	Budget	Summary				
Select	Descrip	tion	Amour	at .		
		idget (from Details Tab)		000.00		
BUDGET	Income	Items	\$5,0	00.00		Cash Available : 100
tab	Expense Crack El	ow (Income - Expense):	ćr o	\$0.00 DO.OO		Cash Available 1003
						Aligned : 100 %

	Details	Conta	octs Applicatio	n Budget	Documents			
12	The docum	ents tab	allows for managem	ent of all docur	nents related to this grant.			
					nk under the Action column has acters (e.g., ",';:*%\$@!). Renam			e User Interface
Coloct	DO NOT UP	Jau mes v	with the names contain	ning special chair	acters (e.g., ,,, /up@:). Kenam	e your me locally and t	Upload File	Add Folder
Select	Navigatio	n: Hom	0					
OCUMENTS	Action T		e ile Name			Modified	Size	Attributes
tab	Action	~						
		Sec.	ackup rantApplication.htm	1		2015-01-02 17:3 2015-01-02 17:3		-
	1 Directory		rano-ppicadoninan			Directory Space U		
Document	• This is	where	you will uplo	ad you sup	porting documentati	on, invoices, re	ceipts, che	cks and pho

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	Edit Grant: Honduras Dental and Vision [2017-18] ID=1218
13	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 approximation of the statement of the state
Select	Club: Collect Grant Signatures
COLLECT	
CLUB	Details Contacts Application Budget Documents
SIGNATURES	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: Honduras Dental and Vision
	*RI Project Number: 1218 (By default, this will be set to the internal Grant No assigned)
	-
	Grant Status has now been changed to: Accepting Club Signatures (2)
Notes	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