

DISTRICT GRANT

Instructions and Worksheet



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

1

Login to
DaCdb
select
GRANTS



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 restructured 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 associated 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.



3

Select the names of those who will approve the club grant application

Signature Selection Notes

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: 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	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) Canale, Isaac M. (Madison)	Klein, Destin J (Madison) Pfeiffer, Eugene H. (Madison) Sanders, Dennis (Madison)

>>>
<<<

- 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.

4

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 (reabeled from Submit Interim Report)
 - There is now a Save Final Report button (reabeled from Submit Final Report)
 - There is a NEW Submit Final Report button. This will promote the Grant to the next state - Final Report Submitted
 - 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
2017-18

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.

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
<input type="checkbox"/>	 	Honduras Dental and Vision	2688	Madison	Approved Grant	\$3,000.00	\$3,000.00	\$4,000.00	\$7,000.00
No Grants: 1						\$3,000.00	\$3,000.00	\$4,000.00	\$7,000.00

6

Click on
NEW GRANT
REQUEST

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

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

No Grants found in 2017-18 OrgYear

7

Complete
the
DETAILS
tab

Then
be sure to
click
SAVE

Grant Details [2017-18] ID=0

[Save](#)

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.

[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: 0 **2017-18** OrgYear can be changed by District (if needed)

* Round:

* City:

* State:

* Country:

* Budget:

* Requested Funding:

Target Completion Date: Target completion date for this project.

Area of Focus:

Project's area of focus (optional) -- previous entries will appear after typing a couple of characters

/es/EN/account/login

scription:

8

Select
The **PENCIL**
to **FINISH**
GRANT
REQUEST



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.

[New Club Grant Request - Click Here to Create Grant](#)

[Change OrgYear](#)

Other Status								
	Project Name	Proj No	Lead Club Name	Status	Approved DDF	Requested DDF	Other Funding	Project Budget
<input type="checkbox"/>  	Honduras Dental and Vision	1218	Madison	Draft	\$0.00	\$3,000.00	\$2,000.00	\$5,000.00
					\$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.				
<div> <div>*Contacts:</div> <div> <div>Club Members Not Included</div> <div> LeCroy, Gail J. (Madison) Lemieux, Thomas S. (Madison) Lillenthal, 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) </div> </div> <div> <div>Club Members Involved</div> <div> Klein, Destin J (Madison) Pfeiffer, Eugene H. (Madison) Sanders, Dennis (Madison) </div> </div> </div> <div> <div>>></div> <div><<</div> <div><< All</div> </div>				

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*

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.

Club: Collect Grant Signatures

Save

Details	Contacts	Application	Budget	Documents
Fill out the detailed grant application form below.				
Grant Timeframe				
*Start Date:		<input type="text"/>		
*Completion Date:		<input type="text"/>		
Address To Mail Grant Payment				
*Name:		<input type="text"/>		
*Address:		<input type="text"/>		
*City:		<input type="text"/>		
*State:		<input type="text"/>		
*Zipcode:		<input type="text"/>		

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.

**Questions
1 – 4
must be
completed**

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

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.

**Complete this
only if
applicable**

**Be sure to
read and
accept
these
terms and
conditions.**

*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.

11

Select
BUDGET
tab

Budget Notes

Details
Contacts
Application
Budget
Documents

Income Items

Requested DDF Funding

\$3,000.00

Croomes, E. Steven
01/02/15

Other Funding Required

\$2,000.00

Croomes, E. Steven
01/02/15

Income Total:

\$5,000.00

Add Income Source

Expense Items

Expense Total:

\$0.00

Add Expense

Budget Summary

Description	Amount
Total Budget (from Details Tab)	\$5,000.00
Income Items	\$5,000.00
Expenses Items	\$0.00
Cash Flow (Income - Expense):	\$5,000.00

Surplus: \$5,000.00

Cash Analysis

Spent Cash : 0 %

Cash Available : 100 %

Budget Alignment

Unaligned : 0 %

Aligned : 100 %

- 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 Final Report 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

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

NEW 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	2015-01-02 17:38:36	0 KB	
	File	GrantApplication.html	2015-01-02 17:38:36	9 KB	

1 Directory | 1 File

Directory Space Used: 9 KB

Document Notes

- This is where you will upload your supporting documentation, invoices, receipts, checks and photos.
- All formats are supported.
- You will first need to scan your invoices, receipts and checks before uploading.

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Select COLLECT CLUB SIGNATURES

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.

Save

Club: Collect Grant 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)

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