



District Grant

2018-2019 Final Report Submission and Approval Process

Kathy Brunot – District Grants Chair Dennis Sanders – District Communications Officer

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, 2019
- Final report due no later than June 15, 2019

Login to DACdb, select the Club Grants icon or the Grants tab and select Club Grants View in the Grant Navigation bar.

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Status now	Chile M		Constant of	2017.1	01				Y		
snows	Club Madison Grants [2017-18]										
APPROVED GRANT	A summary When more Click on \$	is sho than o below,	wn below of all gra one club is working to fund the Club gr	nts submitte on together r <mark>ant.</mark> This wi	d to the District from t on a Grant, the spons Il open a dialog where	his Club. or club is designa the <i>Amount</i> and	ted (*) below. Check No can be enter	ed.			
					New Club Grant Request - Click Here to Create Grant						
Click on 🔪						Appro	ved				
PENCIL to	Ac	tion	Project Name 🕈	Proj No 🕈	Lead Club Name 🕈	Statue 🔶	Funded Amount 🕈	Requested DDF 🕈	Other Funding 🕈	Project Budget 🕈	
		×	Sandbox	3696	Madison	Approved Grant	\$0.00	\$4,000.00	\$1,000.00	\$5,000.00	
edit	No Grants	: 1					\$0.00	\$4,000.00	\$1,000.00	\$5,000.00	

Budget Tab

Replace budgeted income and expenses with actual amounts.



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

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

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.
- 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 Final Report one last time.



Some good examples of file names: ReceiptsForMaterials.jpg, YMCAagreement2018.pdf, ProjectExpenses.xls

Final Report Tab

• Address Sections 1 through 6.

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- Enter accomplishments and results of your project.
- SAVE often as you fill out these sections.



- 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.

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.

Sec. 1: Fill in to reflect results of project. Sec. 2:

Fill in

number

Sec. 3:
Fill in to
reflect
impact of
project.
Sec. 4:
FIII IN
number
Sec. 5:
Sec. 5: Enter the
Sec. 5: Enter the actual
Sec. 5: Enter the actual Rotarian
Sec. 5: Enter the actual Rotarian activity
Sec. 5: Enter the actual Rotarian activity Sec. 6
Sec. 5: Enter the actual Rotarian activity Sec. 6 Fill in only
Sec. 5: Enter the actual Rotarian activity Sec. 6 Fill in only if you have
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? 10
5. What did they do? Please give at least two examples, not including financial support provided to the project.

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

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

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Details

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

Edi	t Grant: Sandbox [2017-18] ID=3696		*
f	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
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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-190201 154419.pdf). (Older copies of Final Report files are saved in the Backup sub-folder.)

Activity Log

Signatures

Interim Report

Final Report

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

Documents

Budget

Application

Contacts

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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.



Members NOT on list: 📄 Include District Members	Members with Club signature permission:
Abbott, Lisa (Greater Huntsville) Adams, Charles H. (Greater Huntsville) Anderson, Cynthia Holt (Greater Huntsville) Andrew, Gary F. (Greater Huntsville) Baker, Lewis Ray (Greater Huntsville) Bateman, Randell Bruce (Greater Huntsville) Baxter, James T. (Tom) III (Greater Huntsville) Belt, Melissa M. (Greater Huntsville) Belt, Melissa M. (Greater Huntsville) Billings, Jay C. (Greater Huntsville) Billings, Jay C. (Greater Huntsville)	Brown, Ronald W. (Greater Huntsville) Qualls, Rodger (Greater Huntsville) Wainwright, Ronald G. (Greater Huntsville) <<

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- 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 2018-19 Club President.
- The Signature Log tab is only for review of signature history.



Your 2018-19 Club President and someone else in the Club Signatures list must:

- Login to DACdb
- Select the Grants tab or the Club Grants icon



DAC d	lb	b R								Rotary District 6860					Welcor	ne: Croom	nes, E. S	ID Lo teven 68	ogout 360-4
District and Out-dat	sister	Home	My	CLUB	My DATA	Committees	PMail ALL	Calendar	DUES	Reports	Sr eakers	Grants	Club PAGES	Files	Forms	ATTND	AGs	Help	
Home	FIND) a Mem	ber	MAP t	o CLUBs	GoTo RegisterM	IE View Dis	strict NEWSI	ETTER	View Dist	rict COm.	100	Sectorstrict LE/	ADERSH	IP View	V RELEAS		ES RI	
Dashboa	rd H	ome	My	Club D	Dashboard	District Da	shboard	District St	tats	System Da	shboard								

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

	GRANT NAVIGATION	District Grants Overview [2017-18]	
<	 ✿ Grant Overview ■ Club Grants 		Change OrgYear
1	안 Grant Secure Files III Admin 〈 ? Help 〈	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.	Grants
		Districts must be qualified by the Foundation to receive district grant funds. [2017-18] Projects:	

Your 2018-19 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 an 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 Her	e to Create Grant
	./				Approv	ved			
	1 -01	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 Gra	nts: 1					\$0.00	\$4,000.00	\$1,000.00	\$5,000.00

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• Your 2018-19 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 Signature Log tab to ensure the signature was recorded

Edit Grant: Sandbox [2017-18] ID=36



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
Patel, Sandeep K	Madison	07/15/2018 03:45 PM
Brown, Ronald W.	Greater Huntsville	07/16/2018 12:33 PM
Stone, Timothy S.	Madison	07/15/2018 03:37 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.

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After both	Edit Gra	nt: Sand	box [201]	7-18] ID=	3696					+
have signed, review	Grant S This Gr to add of 2 Cl for App	Status: Submi rant is locked expenses, upl ub signatures proval.	tted Final Repo and you are una oad files and file have now been r	ort for Club ble to save o reports. The eceived. This	Signatures (10) hanges in its curr Final report is w s report can now	ent state. You ma aiting on Club sign be submitted to th	y continue atures. 2 e District	Club: Sign F	inal Report	Submit Final Report
Final	Details	Contacts	Application	Budget	Documents	Activity Log	Signatures	Interim Report	Final Report	
Report	Complete th	e basic Grant ant is saved, t	information form he Budget and D	below. All the	he fields on this p s will appear.	age must be enter	red to save the ir	nitial Grant application		
PDF and		This	is the RI Bock Gra	nt Number (Sin	nplied Grant Number) issued by RI. The I	District will enter th	is.		
then click	*	Project Name	: Sandbox							
on	* 1	Project Priority	; Medium							
Submit	* Proje	ct Org Year: 1	0 2017-18 0	OrgYear can be	changed by Distric	(if needed)				
Einal										
Final										

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, PMails are sent to everyone listed in the CONTACTS tab. <u>Clean up this list</u>! 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.

DEMO...

- 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.

