## Grants Module Club Process

Ken Dresser - 2021-09-13 - District Grants



## DACdb Grants Module Club Process



# ENTERING YOUR GRANT

- Clubs should designate the contact (also known as preparer) for the grant. You can have more than one contact.
- Clubs should add those who will be the signers of the grant. Check on your club's requirements as to how many signatures you will need.
- Log into the District Database (if you are higher than a level 4, make sure to use your club number when logging in.)



- Click on the My Club Tab



- Then Click on the Grants Icon  **Club Grants**
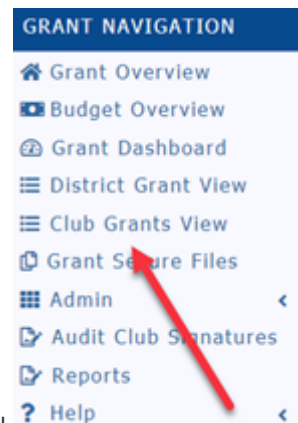


- Click on the Club Grants View on the left side menu
- Change Org Year to the year you are applying for.



- Once the correct year is selected, click on New Club Grant Request

- There are four pages to complete on the New Grant Request
    - Details
    - Clubs Involved
    - Contacts
    - Application



- Details
    - This page contains general information about the grant. Fill the page out completely.



- Clubs Involved
    - Your club name will automatically appear here. If another club is working on the grant, select them from the list on left and use the arrows to move them to the right.



- Contacts
    - This is a list of the club members who will be working on preparing the grant and are responsible for collecting receipts, money, closure, etc. The person's name who started the process of the application will automatically appear on the right. To add others select them from the left column and move them over with the right arrows. Keep in mind, automated emails will be sent out and if

"Contacts" is selected as recipients all the individuals listed will receive the same email.
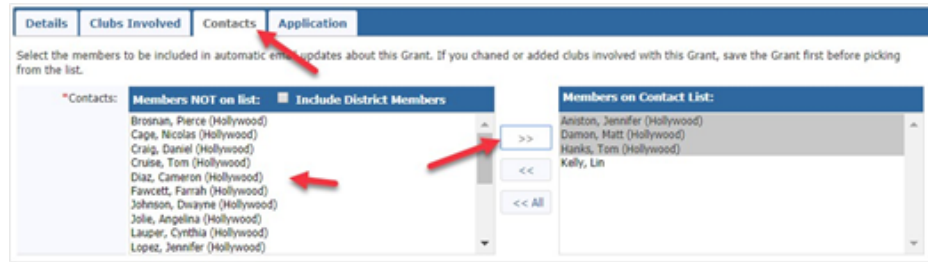


- Application
  - This page is the application itself. Some of this information is automatically transferred to the Final
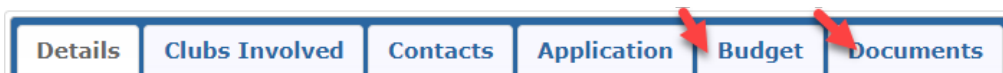  - Report so watch your spelling and be very detailed here.



- Once you have completed all four tabs, click on Save – You now have a draft grant



- Once you click on "save", two new tabs will now appear on the top of the page, Budget & Documents.

- Add your Income Items. Click on Add Income Source



- A pop-up box will appear
- Enter Description
- Once you put DDF Requested Amount or Requested DDF amount put the amount in and make sure you select the Funding Source. So in this case you will select DDF Requested.
- If your District requires our club to spend an amount equal to your request, enter that amount as additional income enter those items but for the Funding Source click on Other Club Funding



- Once you have your income added it will look something like this:



- Expenditures should be itemized and include any estimated expenses for the project.
- Click on Add Expense



- Enter your description and amount, click on Add

## Add Expense Item

Enter the Grant funding information below. Specify if the funding source is coming from requested DDF funds or part of the club contribution.

| | |
|---|---|
| Description: | Stickers for Dictionaries |
| Club: | Hollywood (99969889) ▼ |
| Amount: | 150.00 |

Cancel     Add

- Continue to add your estimated expenses until expenses equal income sources.
- So, your budget should look something like this



**Income Items**                                                                 Add Income Source

| Action | Item Name | Club | DDF | Amount | Created | Modified |
|---|---|---|---|---|---|---|
| ✎✗ | DDF Requested Funds | Hollywood | ✔ | $2,000.00 | Kelly, Lin 02/11/18 12:12 PM | |
| ✎✗ | Club Fund Raiser | Hollywood | | $2,000.00 | Kelly, Lin 02/11/18 12:13 PM | |
| | Income Total: 1 out of 1 club(s) contributed | | | $4,000.00 | (DDF Request: $2,000.00, Other Funding: $2,000.00) | |

**Expense Items**                                                                 Add Expense

| Action | Item Name | Club | Amount | Created | Modified |
|---|---|---|---|---|---|
| ✎✗ | Purchase of Dictionaries | Hollywood | $3,600.00 | Kelly, Lin 02/11/18 12:21 PM | Kelly, Lin 02/11/18 12:25 PM |
| ✎✗ | Stickers for Dictionaries | Hollywood | $150.00 | Kelly, Lin 02/11/18 12:24 PM | |
| ✎✗ | Juice and Cookies for students | Hollywood | $250.00 | Kelly, Lin 02/11/18 12:24 PM | |
| | Expense Total: | | $4,000.00 | | |

**Budget Summary**

| Description | Amount |
|---|---|
| Total Income (DDF+Club Funding): | $4,000.00 |
| Expenses Items: | ($4,000.00) |
| **Cash Flow (Income - Expense):** | **$0.00** |

- If you have any letters of commitments, copies of quotes and other documentation, please upload them under the Document Tab. Signed MOU's can also be uploaded here.
- Click on the Documents Tab



| Details | Clubs Involved | Contacts | Application | Budget | Documents |

- Add documents by clicking on the upload file or add a folder and then upload files in the folder.
- You can also use the existing folders Documents and Images if you wish.
- To have the best results for the Final Report, upload your receipts and images as jpg or png.
- You can also add pdfs, excel, and word documents.
- When you name files please do not put in any special characters or you could incur a problem with opening the file.
- Also note the Grant Application is saved as an html file as your work through the process.
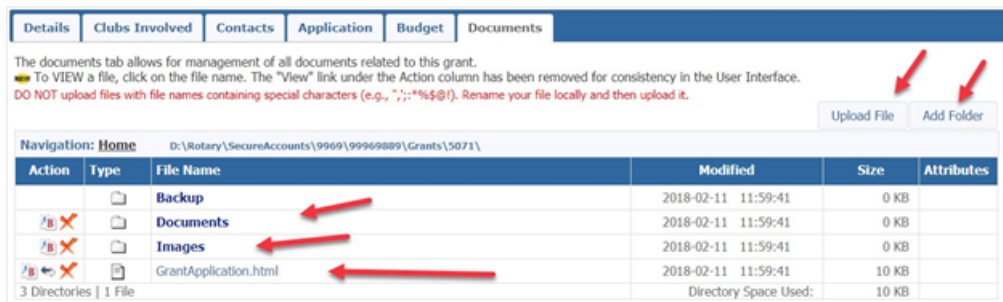
- Browse your computer for the file and click on add. **Do not use any type of special characters or punctuation in the naming of your documents.**
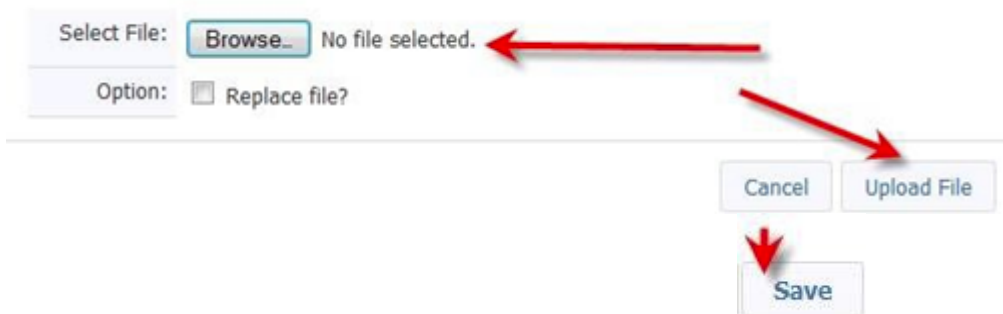


- At this point, SAVE your grant. You can never save too often!
- Once you complete your budget and add documents you will see two additional tabs – "Activity Log" and "Signatures.
- You can click on "Activity Log" to see what has been completed and "Signatures" to see where you are in the signing process. Once your grant is approved you will see the "Interim Report and the "Final Report" tabs. In most cases Districts do not require an Interim Report. Your District will advise you. The "Final Report" button will be used when you complete your project.



- Double check all your work before you collect the club signatures. You can always delete the grant at this point.

# SIGNING & SUBMITTING A GRANT

- The District designates how many signatures from each club are needed. In this example, we are going to use two signatures required. If other clubs are involved with your grant, you need two signatures from each club.
- **The signers must be on the club signature list. Probably the President of your club will click on Admin on left menu bar and then Club Signatures.** Select the individuals from the left column and move them over to the right column. Then click on save.
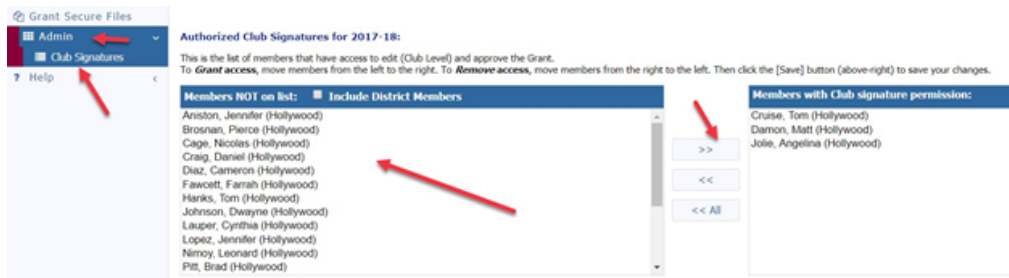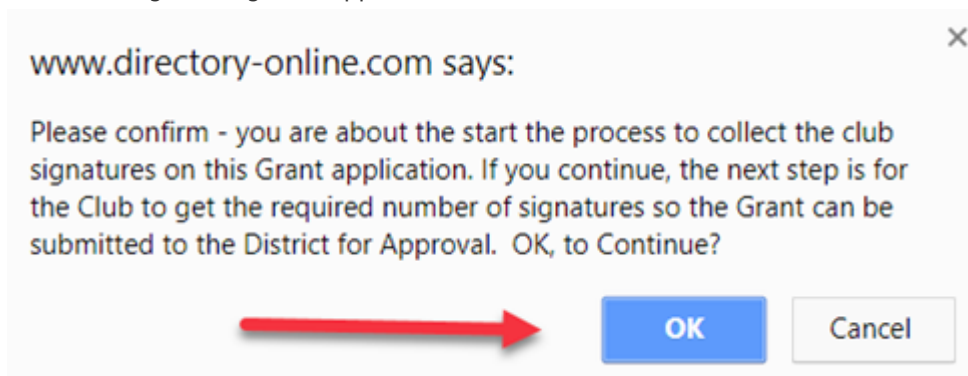
- Signer number one will click on edit grant (the pencil)



- He/she will click on "Club: Collect Club Signatures"



- The following message will appear



www.directory-online.com says:

Please confirm - you are about the start the process to collect the club signatures on this Grant application. If you continue, the next step is for the Club to get the required number of signatures so the Grant can be submitted to the District for Approval. OK, to Continue?

**OK**     Cancel

- He/she will click OK. Two new buttons appear on the top right. "Club: Sign Grant Application" and "Revert to Draft".
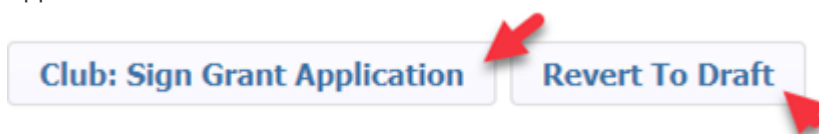


- Signer number one will now click on "Club: Sign Grant Application".
- A new box pops up – they will click on sign grant
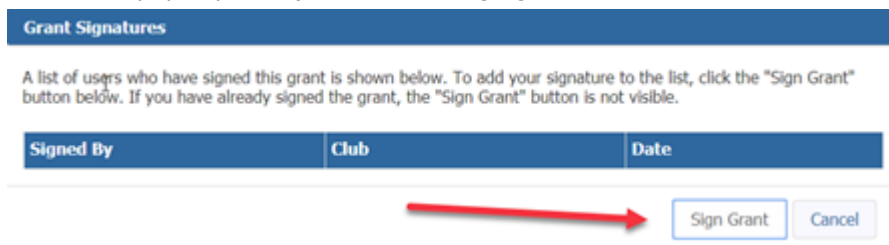


- The second signer is now ready to sign the grant application.
- Click on the edit pencil in front of the grant
- Click on "Club: Sign Grant Application" on top right
- The signature box will pop up, they will see the first signer's name in the box. They

now will click on "Sign Grant"



- The second signer will now click on the button "Submit Grant for District Approval"



- The status of the grant will now say "Submitted Grant for District Approval



- The District will now review the grant. You can no longer make any edits to the application. However, you can add additional documents to the grant and add information to the expense tab. You can also "revert back to draft" if you need to start over.
- If the District requires more information, you will receive a note from the District Grant Chair.

# GRANT FINAL REPORT

**COMPLETING THE FINAL REPORT**

- Some Districts require an Interim Report. If your District requires one follow the same procedure.
- Once you have completed the project you must complete an on-line Final Report
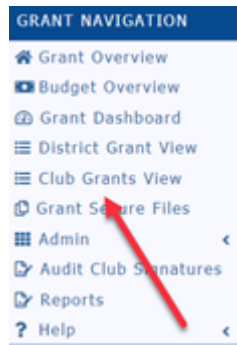- Go to the District Database



- Click on the My Club



- Click on the Club Grants Icon  **Club Grants**

- Click on Club Grants View on left side menu

- Click on the edit button (pencil) of the grant you wish to complete.



- The grant status must say "Approved Grant" otherwise the Final Report will not appear

- First, click on the budget tab and make sure you replace the information with actual funds and expenses. You must itemize each receipt and copies of the receipts must be uploaded in the documents.



- Scan photos of the project and rotary involvement, all receipts and copies of any checks you may have disbursed and save them as "jpg" or "png" files and upload them to the Documents tab.



- Click on the Final Report Tab



- Some Districts will only use the Final Report

- Complete items 2, 4, 5 and 6. Items 1 and 3 are filled in automatically. You cannot leave any of this information blank.

- Your photos and receipts will automatically appear under the photo and receipt section if you saved them under documents as a "jpg" or "png" file.

- The Final Report must be completed by one of the two individuals in the club who prepared the grant request and can only be signed by the Club Signees.

- When you are finished with the Final Report, click on the "Save Final Report" to save your work.
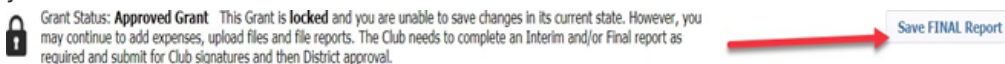


- The two individuals designated as club signees will need to sign the "Final Report"

- After you save the final report the club signees are ready to sign it. The first Club Signer will click on the edit button, click on Final Report and click on "Club – Collect

Final Signatures"  **Club: Collect FINAL Signatures**  **Save FINAL Report**

- A new button, "Club: Sign Final Report" will appear on the top right. Signer will click on the box.

**Club: Sign Final Report**

- A new box will appear, click on sign grant

**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 |
|-----------|------|------|

[ Sign Grant ]  [ Cancel ]

- The second signer of the Final Report will now go to the database and click on the pencil to edit the grant. Click on the Final Report tab and they will click on the "Club:

**Club: Sign Final Report**

Sign Final Report" button

- The sign grant box will pop up. You will see the signature of the first signee - click on "Sign Grant"

**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 |
|-----------|------|------|
| Damon, Matt | Hollywood | 02/11/2018 02:11 PM |

[ Sign Grant ]  [ Cancel ]

**Submit Final Report**

- The second signer will now click on "Submit Final Report"
- The status of your grant will now be changed to "Submitted final report for District Approval"

**For District Review**

| ☐ | Action | Project Name | Proj No | Lead Club Name | Status |
|---|--------|--------------|---------|----------------|--------|
| ☐ | ✎ ✖ ▤ | Hollywood Literacy Project | 4389 | Hollywood | Submitted Final Report for District Approval |

- Depending on the District the Final Report will be reviewed, audited and/or approved.