

Learning Center > District Support > District Grants > Grants Module Club Process

Grants Module Club Process Ken Dresser - 2021-09-13 - District Grants

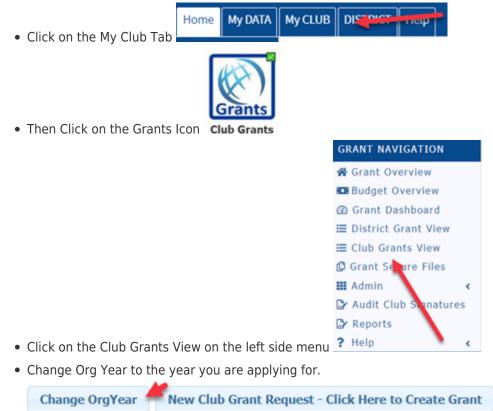


DACdb Grants Module Club Process



ENTERING YOUR GRANT

- Clubs should designate the contact (also known as preparer) for the grant. You can h ave more than one contact.
- Clubs should add those who will be the signers of the grant. Check on your club's req uirements 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.)



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

Change OrgY	New	Club Grant Requ	iest - Click	Here to Creat	e Grant							
There are four page	s to com	plete on the New	Grant Requ	iest								
 Details 												
 Clubs Involve 	ed											
 Contacts 												
○ Application	Details	Clubs Involved	Contacts	Application								

- Details
 - $\,\circ\,$ This page contains general information about the grant. Fill the page out

comp	letely.
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Details	Clubs Involv	Ved Contacts Application
Complete th Once the Gr	he basic Grant inf rant is saved, the	formation form below. All the fields on this page must be entered to save the initial Grant application. Budget and Document tabs will appear.
	Project Name:	Test Project
	Priority:	High 🔻
* Proj	ject Org Year: 0	2018-19 OrgVear can be changed by District (if needed)
	* Round:	1 (e.g., 1 or 2)
	= City:	Hollywood
	* State:	CA
	* Country:	US
Target Co	mpletion Date:	05/01/2018 Target completion date for this project.
	Area of Focus:	Promoting Peace Fighting Disease Promoting Clean Water, Sanitation and Hygene Saving Mothers and Children Supporting Education Growing Local Economies Other:
* Proje	ect Description:	Put a brief description of the project here

- 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.

Details Clubs Invo	Ved Contacts Application			
	wed with this project below. The primary club must remain ubs participating can be aggreagated into the total requested		in the DETAIL tab. After the initial project is cre	ated, the DDF funding c
* Clubs Involved:	District Club List	1	Clubs Involved	
	AA (999703618) AAAA (999703938) Bunk Musters - Test (9999) Bunk Musters Rotaract (999703943) Bunter Buil - Test (9901205) Camboile these secole (99970351) d6710 Jefferson copy for holding dup dues (999703472) Daddb Development Test (99012208) Demonstration Cub (999703827)	*	Hollywood (99969889)	

- 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



- 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.

Det	-	and an a									
			t application	form below.							
Grant *Start		rame									
	plation			-							
Addre	ss To	Mail Gran	t Payment								
*Nam	-										
*Addr											
*City:											
*State											
*Zipce	de:										
Projec	t Defi	nition									
*Descr	ibe the	project o	jectives.								
"Huma less for			Describe how	the project will	benefit the comm	unity and/or	rimprovi	the live	is of the		
								//			
Active	Rotar	ian Involv	ment: Descr	ibe the nonfina	ncial participation I	by rotarians i	in the pr				
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• Once you have completed all four tabs, click on Save – You now have a draft grant

Save

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

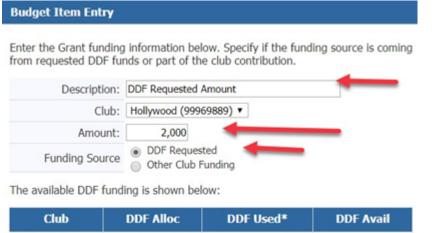
Details Clubs Involved Contacts Application B	Budget Documents
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• Add your Income Items. Click on Add Income Source

Incon	Income Items									ce
Action	Item Name	¢	Club	\$	DDF	Amount	¢	Created +	Modified	¢
There	There is NO income source defined. Add the DDF amound being requested and other funding Income sources above.									
	Income Total: 0 out of 1 club(s) contributed \$0.00 (DDF Request: \$0.00, Other Funding: \$0.00)									

- 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



Hollywood	0.00	0.00	0.00
* DDF Used reflects	"funded" Grants, does not i	nclude Grants application	s in progress
		-	

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

Details	s Clubs Involved Co	ontacts Application	Budget	Docun	nents				
Income Items Add Income Sou									
Action	Item Name	• Club	٠	DDF	Amount •	Created	٠	Modified	
2×	DDF Requested Funds	Hollywood		~	\$2,000.00	Kelly, Lin 02/11/18 12:12 PM			
2×	Club Fund Raiser	Hollywood			\$2,000.00	Kelly, Lin 02/11/18 12:13 PM			
	Income Tota	: 1 out of 1 club(s) contr	buted		\$4,000.00	(DDF Request: \$2,000.00	, Other Fundin	ng: \$2,000.00) 📹	_

Add

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

Expense Items			Add Exper	ise					
Action Item Name	¢	Club	¢	Amount	۰	Created	٠	Modified	•
Expense	Total:			\$0	.00				

• Enter your description and amount, click on Add

Add Expense Item	l
	ing information below. Specify if the funding m requested DDF funds or part of the club
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 So	ource
Action	Item Name 🔹 🕈		Club	٠	DDF	Amou	nt e		Created	٠	Modified	÷
2×	DDF Requested Funds	Hollywood			~	\$2,0	00.00	Kelly, Lin 02/11/18	12:12 PM			
2×	Club Fund Raiser	Hollywood				\$2,0	00.00	Kelly, Lin 02/11/18	12:13 PM			
	Income Total:	1 out of 1 cl	ub(s) contribut	ed		\$4,00	\$4,000.00 (D		(DDF Request: \$2,000.00, Other Fundi		ng: \$2,000.00)	
Expense	ttems			-				Add Expense				
Action	Item Name 🔹 🕈	Club +	Amount +	Crea	nted	٠	M	lodified +				
2×	Purchase of Dictionaries	Hollywood	\$3,600.00	Kelly, Lin 02/	11/18 12	:21 PM K	ielly, Lin	02/11/18 12:25 PM				
2×	Stickers for Dictionaries	Hollywood	\$150.00	Kelly, Lin 02/	11/18 12	:24 PH						
2×	Juice and Cookies for students	Hollywood	\$250.00	Kelly, Lin 02/	11/18 12	:24 PH						
	Expense Total:	:	\$4,000.00	-								
Budget	Summary											
Descrip	tion 0	Amount	•									
Total In	come (DDF+Club Funding):	\$4,000.	.00									
Expense	es Items:	(\$4,000.0	00)									
Cash F	low (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



- 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.

Details	Clubs I	nvolved Contacts Application Budget Docur	ments		
To VIEW	a file, clic	ows for management of all documents related to this grant. k on the file name. The "View" link under the Action column has h file names containing special characters (e.g., "/;::*%\$@I). Rename		1	1
				Upload File	Add Folder
Navigatio	n: Home	D:\Rotary\SecureAccounts\9969\99969889\Grants\5071\			
		er friendet foren en er en			
Action	Туре	File Name	Modified	Size	Attributes
Action	Туре		Modified 2018-02-11 11:59:41	Size 0 KB	Attributes
Action		File Name			Attributes
		File Name Backup	2018-02-11 11:59:41	0 KB	Attributes
28 ×		File Name Backup Documents	2018-02-11 11:59:41 2018-02-11 11:59:41	0 KB 0 KB	Attributes

• 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.

Select File:	Browse_ No file selected.		
Option:	Replace file?	-	
		Cancel	Upload File
		*	

Save

- 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.

Details	Clubs Involved	Contacts	Application	Budget	Documents	Activity Log	Signatures
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• 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)

Club	Process							
	Actic	Project Name	¢	Proj No 🛛 🗢	Lead Club Name	¢	Status	¢
	2 📝	Test Grant		5071	Hollywood		Draft	
No G	Grants: 1							

• 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?



×

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



• A new box pops up - they will click on sign grant

	signed this grant is shown below. To a ve already signed the grant, the "Sign G	dd your signature to the list, click the "Sign Grant" rant" button is not visible.
Signed By	Club	Date

- 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"



Dist	trict R	evie	w and	Approval							-
		Actio	on	Project Name	¢	Proj No	¢	Lead Club Name	٠	Status	٠
	2	×	7	Test Grant		5071		Hollywood		Submitted Grant for District Appr	oval

- 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 Club Grants Icon Club Grants

GRANT NAVIGATION
🖨 Grant Overview
Budget Overview
Grant Dashboard
≣ District Grant View
≣ Club Grants View
🕼 Grant Searce Files
III Admin 📢 🤞
🕞 Audit Club Stanatures
🕞 Reports
? Help 👌 🤞

- Click on Club Grants View on left side menu ?
- Click on the edit button (pencil) of the grant you wish to complete.

	Action	Project Name	¢	Proj No	¢	Lead Club Name	¢	Status
	22	Test Project		4407		Bank Masters - Test Hollywood (*)		Approved Grant
No (Grants: 1						1	

• 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.

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

 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

Details	Contacts	Application	Budget	Documents	Activity Log	Signatures	Interim Report	Final Report
We did not	find an oviction	Final Club Ban	ant report to	odit A MEM Fie	ol Club Depart rep	ort one he found	helew	

- 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.



Sign Final Report" button

• A new box will appear, click on sign grant

Grant Signatures		
	gned this grant is shown below. To ac already signed the grant, the "Sign G	dd your signature to the list, click the "Sign Grant" rant" 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

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

	gned this grant is shown below. To add you already signed the grant, the "Sign Grant" l	r signature to the list, click the "Sign Grant" button is not visible.
Signed By	Club	Date
Damon, Matt	Hollywood	02/11/2018 02:11 PM
he second signer w	rill now click on "Submit Final I	Sign Grant Cancel 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 🖌 🖌
	2 🗶 🗵	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.