



Grant Application and Final Report

Presenters: Lin Kelly and Michael Soden



District and Club database

AGENDA

1. Accessing Grants Module
2. Adding Club Signatures
3. Change to current org year
4. Create new Application
5. Complete Budget
6. Add Documents
7. Submit Application to District
8. Complete Final Report
9. Submit Final Report to District
10. Promos-Mike

GRANT APPLICATION

- Accessing the Grants Module
- Go to My Club, Grants Icon



GRANT APPLICATION



- This will take you to the District Grants Overview Page
- Check the date and make sure it is your current date
- If not click Change org year on the top right
- Select the current year, make it your working year and click on Change OrgYear on bottom



Grant Org Year

Select the OrgYear to update the list on this page with the grants for that org year.

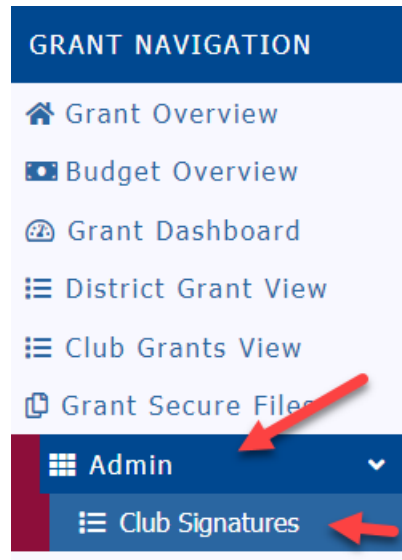
OrgYear: ←

Option: Save this as my working OrgYear ↓

GRANT APPLICATION



- First, Add your club signatures, those individuals in the club who will sign and submit the documents to the District. In some cases this is one name and in others it is two names. Your District will define how many signatures are needed.
- Click on Admin on the left, then Club Signatures



GRANT APPLICATION

- Select the names on the left and move them to the right. Click the save on top right of page

Club Signatures Configuration:

Number of Club Signatures Required: The District requires a minimum of 1 club signatures.

Authorized Club Signatures for 2020-21:

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.

Members NOT on list: Include District Members
 Add by Leadership Role (ex. P,T,S)

- Abeagard, Vonda (Hollywood)
- Aniston, Jennifer (Hollywood)
- Baba, Ali (Hollywood)
- Barrymore, Drew (Hollywood)
- Brosnan, Pierce (Hollywood)
- Cage, Nicolas (Hollywood)
- Chastain, Jessica (Hollywood)
- Craig, Daniel (Hollywood)
- CRMlast, CRMfirst (Hollywood)
- Cruise, Tom (Hollywood)
- Damon, Matt (Hollywood)
- Daniels, Jeff (Hollywood)

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<< All

Members with Club signature permission:



Let's you know how many signatures the District is requesting

Select name on left and use the top set of arrows to move them to the right

GRANT APPLICATION

- Next click on Club Grants View on the left. You will see the New Club Grant Request on the top right of the page. Click that on.

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

- If you did not set up your signatures you will get a message like this

www.dacdb.com says

At least 2 Club Signatures must be authorized before creating a Grant.
Select "Admin" in the right sidebar menu and then "Club Signatures".

OK

GRANT APPLICATION




- If you added the correct amount of signatures you will be taken to the details tab of the application
- You will see 4 tabs going across the top of the page



- To start you must at least complete the Details Tab. Then you can save your grant and work on it later.

GRANT APPLICATION

• Details Tab

* Project Name:	<input type="text" value="Hollywood Backpack Program"/>
Priority:	<input type="text" value="Medium"/>
* Project Org Year: 1	2020-21 <small>OrgYear can be changed by District (if needed)</small>
* Round:	<input type="text" value="1"/> <small>(e.g., 1 or 2)</small>
* City:	<input type="text" value="Hollywood"/>
* State:	<input type="text" value="CA"/>
* Country:	<input type="text" value="US"/>
Target Completion Date:	<input type="text" value="11/30/2020"/>  Target completion date for this project.
Area of Focus:	<input type="radio"/> Promoting Peace <input type="radio"/> Promoting Clean Water, Sanitation and Hygiene <input type="radio"/> Supporting Education <input type="radio"/> COVID-19 <input type="radio"/> Fighting Disease <input checked="" type="radio"/> Saving Mothers and Children <input type="radio"/> Growing Local Economies <input type="radio"/> Other:
* Project Description:	<p>Enter a short but clear description of your project here</p> <div style="border: 1px solid black; height: 150px; width: 100%;"></div>

GRANT APPLICATION


- Clubs Involved Tab
- If there are other clubs involve, select them from the left and move them to the right

Enter the **other** Clubs involved with this project below. The primary Club must remain on this list.

The DDF from the other Clubs participating can be aggregated into the total requested for this project on the DETAIL tab. After the initial project is created, the DDF funding can be seen on each Club.

* Primary Club:


* **Club List**

- Bank Masters - Test (9999) 
- Banking Satellite (9969006) - Satellite Club
- Butter Ball - Test (99012205)
- Cambio - Test (99012207)
- Cant Delete these people (999703501)
- d6710 Jefferson copy for holding dup dues (999703472)
- DaCdb Development Test (99012208)
- Demonstration Club (999703827)
- Flank Steak - Test (99012204)
- Frankenstein (99691)

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Clubs Involved

- Hollywood (99969889) 

GRANT APPLICATION

- Contacts Tab
- Enter those working on this grant on this tab. It can be other individuals who are not on the signature list

Details
Clubs Involved
Contacts
Application
Budget
Documents

Select the members to be included in automatic email updates about this Grant. If you changed or added clubs involved with this Grant, save the Grant first before picking from the list.

***Contacts:**

Members NOT on list: **Include District Members**

Abeagard, Vonda (Hollywood)
Aniston, Jennifer (Hollywood)
Baba, Ali (Hollywood)
Brosnan, Pierce (Hollywood)
CRMlast, CRMfirst (Hollywood)
Chastain, Jessica (Hollywood)
Craig, Daniel (Hollywood)
Cruise, Tom (Hollywood)
Damon, Matt (Hollywood)
Daniels, Jeff (Hollywood)

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<< All

Members on Contact List:

Barrymore, Drew (Hollywood)
Cage, Nicolas (Hollywood)


GRANT APPLICATION

- Application Tab
- This tab has a little more information that you need to complete

Fill out the detailed grant [9934] application form below.

Grant Timeframe

*Start Date: 

*Completion Date: 

Address To Mail Grant Payment

*Name:

*Address:

*City:

*State:

*Zipcode:

Project Definition

*Describe the project objectives.

*Humanitarian Efforts: Describe how the project will benefit the community and/or improve the lives of the fortunate.

*Active Rotarian Involvement: Describe the nonfinancial participation by rotarians in the project.

*Publicity Plan: How will the general public know this is a rotary sponsored project?

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 Agreement

*This document is the ELECTRONIC APPLICATION defined in Section 2(d)(3) of the Memorandum of Understanding (MOU) provided by the Rotary District for Clubs participating in the District Grant Program. It is an agreement between the Club and District 7770 explaining what measures the Club will undertake to ensure proper implementation of District Grant activities and management of Rotary Foundation Grants Funds. By authorizing this document, the Club agrees it will comply with all Foundation requirements contained within the MOU executed during Future Vision Grants Management Seminars. Club MUST submit a Closing Report within 60 days of project completion.

Yes, I Understand and accept the terms of the Club Statement Agreement.

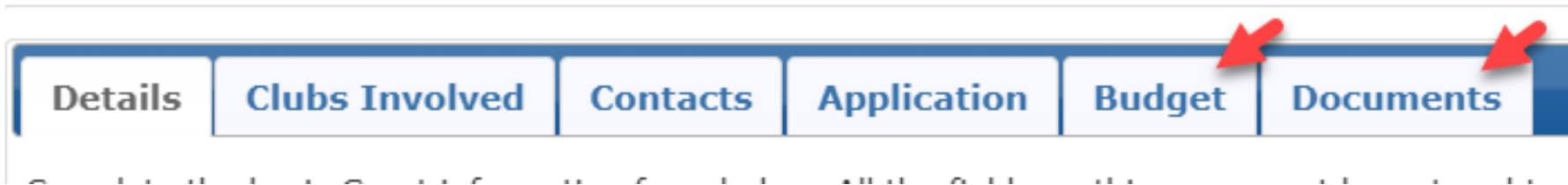
Trustee Guidelines & Matching Grant Awards Terms & Conditions

*By signing this grant request, I confirm that our Rotary Club is requesting a District Grant in the amount above will be spent in accordance with Trustee approved guidelines and the Terms and Conditions of Matching Grant Awards. All of the information contained herein is true and accurate.

Yes, I Understand and accept the terms and conditions.

GRANT APPLICATION

- Save the application
- Once you save the grant, you will see two more tabs appear on the top of the page



- Budget Tab
- To add your income sources click on the Add Income Source Link

Income Items [Add Income Source](#)

Action	Item Name	Club	DDF	Amount	Created	Modified
There is NO income source defined. Add the DDF amount 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)	

[Add Funding](#)

GRANT APPLICATION

- First add your DDF Request

Add Income 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:	DDF Request
Club:	Hollywood (99969889) ▼
Amount:	500.00
Funding Source	<input checked="" type="radio"/> DDF Requested <input type="radio"/> Other Club Funding

The available DDF funding is shown below:

Club	DDF Alloc	DDF Used*	DDF Avail
Hollywood	0.00	0.00	0.00

* DDF Used reflects "funded" Grants, does not include Grants applications in progress

Cancel Add

GRANT APPLICATION

- Next add your club contribution if applicable

Add Income 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:	Club Contribution from Fundraisers	
Club:	Hollywood (99969889) ▼	
Amount:	500	
Funding Source	<input type="radio"/> DDF Requested <input checked="" type="radio"/> Other Club Funding	

The available DDF funding is shown below:

Club	DDF Alloc	DDF Used*	DDF Avail
Hollywood	0.00	0.00	0.00

* DDF Used reflects "funded" Grants, does not include Grants applications in progress

Cancel
Add



GRANT APPLICATION

- Now add your expenses

Add Expense Item

Enter the Expense information below.

Description:	<input type="text" value="Backpacks"/>
Club:	<input type="text" value="Hollywood (99969889)"/>
Amount:	<input type="text" value="500.00"/>

Add Expense Item

Enter the Expense information below.

Description:	<input type="text" value="School Supplies"/>
Club:	<input type="text" value="Hollywood (99969889)"/>
Amount:	<input type="text" value="500.00"/>

Expense Items

Action	Item Name	Club	Amount	Created	Modified
	Backpacks	Hollywood	\$500.00	Cage, Nicolas 07/13/20 07:29 PM	
	School Supplies	Hollywood	\$500.00	Cage, Nicolas 07/13/20 07:30 PM	
Expense Total:			\$1,000.00		







GRANT APPLICATION

- Your Budget page should be in balance:





Income Items

[Add Income Source](#)

Action	Item Name	Club	DDF	Amount	Created	Modified
 	DDF Request	Hollywood	✓	\$500.00	Cage, Nicolas 07/13/20 07:26 PM	
 	Club Contribution from Fundraisers	Hollywood		\$500.00	Cage, Nicolas 07/13/20 07:27 PM	
Income Total:		1 out of 1 club(s) contributed		\$1,000.00	(DDF Request: \$500.00 , Other Funding: \$500.00)	

Expense Items

[Add Expense](#)

Action	Item Name	Club	Amount	Created	Modified
 	Backpacks	Hollywood	\$500.00	Cage, Nicolas 07/13/20 07:29 PM	
 	School Supplies	Hollywood	\$500.00	Cage, Nicolas 07/13/20 07:30 PM	
Expense Total:			\$1,000.00		

Budget Summary


Description	Amount
Total Income (DDF+Club Funding):	\$1,000.00
Expenses Items:	(\$1,000.00)
Cash Flow (Income - Expense):	\$0.00



GRANT APPLICATION







- Documents Tab
- If you have any initial documents, you can add them now. When the project is over you will upload all receipts and pictures to this section before submitting the final report. You can add folders or just add documents to the folders already there.

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

 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.

Navigation: [Home](#)

Action	Type	File Name	Modified	Size	Attributes
		Backup	2020-07-13 14:14:26	0 KB	
		Documents		0 KB	
		Images		0 KB	
		GrantApplication		9 KB	
				9 KB	

3 Directories | 1 File

Last Updated on: **Never** By: **System** Created: 07

Upload File

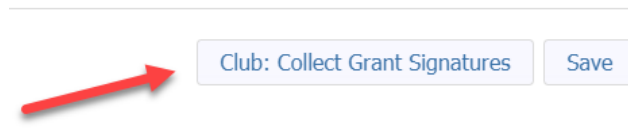
Select a local document file to be uploaded into the files area. If you are replacing an existing file, check the Replace File checkbox. There is no backup for lost/overwritten files. Please always keep a local backup copy of your files.

Select File: No file chosen

Option: Replace file?

GRANT APPLICATION

- Documents Tab
- Remember the file name can contain no special characters like , “;:*%@!
- Instead of spaces when naming the document use the underscore
- Now you can save the document and click the collect grant signatures on the top right of the page



- You will get this message – say OK

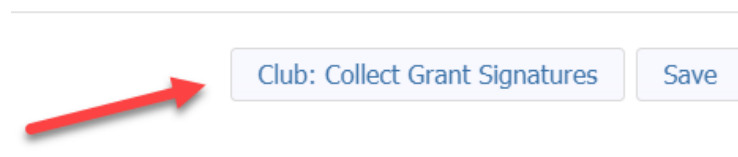
www.dacdb.com says

Please confirm - you are about to 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?



GRANT APPLICATION

- Signing the Grant
- Now you can save the document and click the collect grant signatures on the top right of the page



- You will get this message – say OK

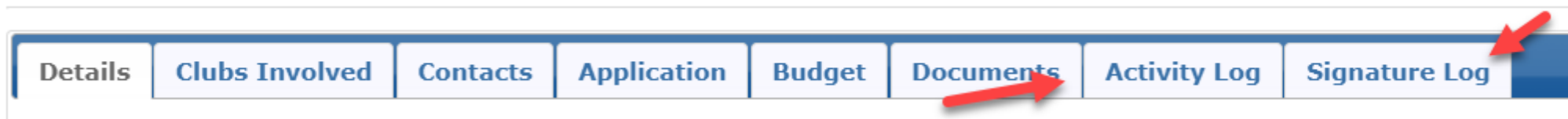
www.dacdb.com says

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?

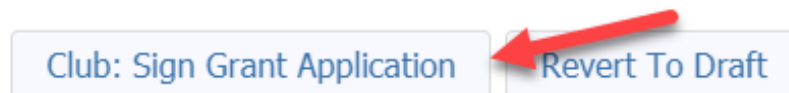


GRANT APPLICATION

- Signing the Grant
- Once you close the box you will see two new tabs



- You will also see a new button on the top right of the page- Sign Grant Application. You can also revert back to a draft




GRANT APPLICATION

- Signing the Grant
- When you click on Sign Grant Application, this box will pop up. 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
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- If more than one signature is required, you will continue to see the Sign Grant Application Button. You will make sure you second signee now goes into the grant to sign it.

GRANT APPLICATION

- Signing the Grant
- When the second signee goes in to sign the grant this box will pop up and they will see the person who has already signed the 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
Cage, Nicolas	Hollywood	07/13/2020 07:44 PM



GRANT APPLICATION

- Signing the Grant
- Once the second person signs a new warning box will pop up. Click the appropriate answer

Grant Signatures Complete

ATTENTION: All required signatures have been applied. If you are ready to submit this Grant for district approval click "Yes" below. Please be sure that:

- 1) The Grant Budget is complete.
- 2) The Grant Application has been completely filled out.

Yes, Submit Grant for District Approval

No, Continue to Add Grant Details

GRANT APPLICATION



- Final Report
- Now that you have completed your project you need to complete the final report
- 1st update your expenses with the actual receipts from your project
- Add all the pictures and receipts to your documents tab
- Now complete the final report.
- Items 1 and 3 will be auto populated. Complete line 2, 4, 5 and 6

GRANT APPLICATION

• Final Report

Project Description

1. Describe the project. What was done, when, and where did project activities take place? If this is a progress report, what remains to be done?

Nice description go here

2. How many people benefited from this project?



3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?

Complete this

4. How many Rotarians participated in the project?



5. What did they do? Please give at least two examples, not including financial support provided to the project.

Taught them how to use the tools in the garden, to plant the plants, and to set the irrigation system



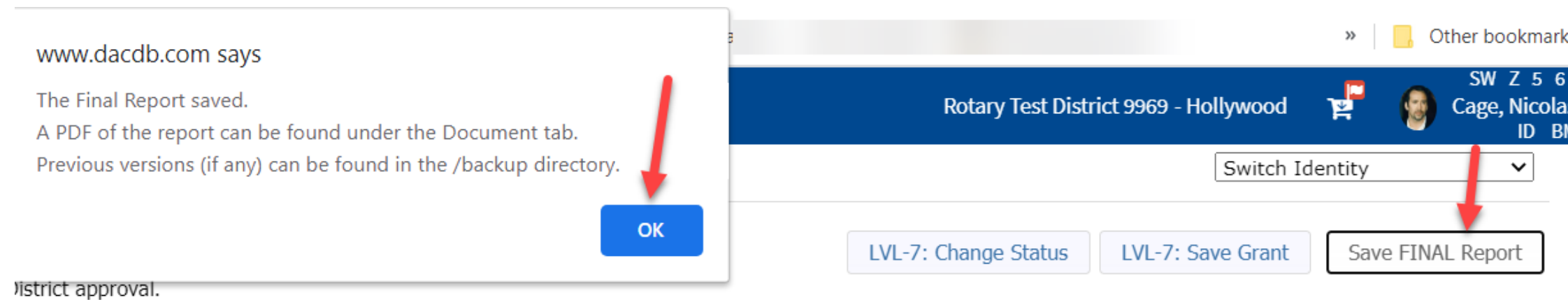
6. If a cooperating organization was involved, what was its role?

n/a



GRANT APPLICATION

- Final Report
- Now click on save Final Report on the top right. You will get the following pop-up box



www.dacdb.com says

The Final Report saved.
A PDF of the report can be found under the Document tab.
Previous versions (if any) can be found in the /backup directory.

OK

Rotary Test District 9969 - Hollywood

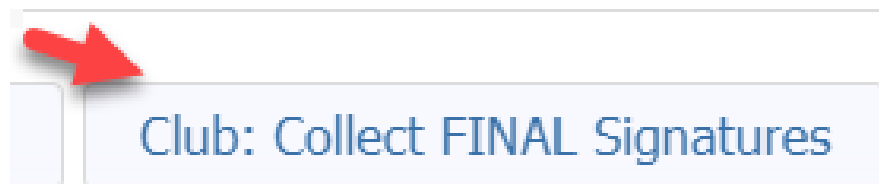
SW Z 5 6
Cage, Nicola
ID B

Switch Identity

LVL-7: Change Status LVL-7: Save Grant Save FINAL Report

District approval.

- You will have a new button – Collect Final Signatures





GRANT APPLICATION

- Final Report
- After you click the button a new button will appear. Sign Final Report. Similar to the application, the first club signee signs it.
- This time a box pops up with all previous signatures. Click 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
Cruise, Tom	Hollywood	07/13/2020 07:57 PM
Damon, Matt	Hollywood	07/13/2020 07:57 PM
Cage, Nicolas	Hollywood	07/13/2020 07:57 PM
Ramon, John	Hollywood	07/13/2020 07:57 PM



GRANT APPLICATION

- Final Report
- The second person signs the grant.
- A new box pops up reminding you to check to make sure everything is completed and if it is you can submit to the District for Approval

Grant Signatures Complete

ATTENTION: All required signatures have been applied. If you are ready to submit this Final Report for district approval click "Yes" below. Please be sure that:

- 1) The Final Report has been completely filled out.
- 2) All documents are complete and uploaded.
- 3) The Budget has been updated with actuals.



DACDB SUPPORT

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 - Email our support
 - Create a ticket for an issue or enhancement
 - Read our documentation
 - View our videos

Please feel to contact the DACdb Support Team

General DACdb Support: support@dacdb.com

Easy & Beautiful, WordPress Support: websites@dacdb.com

Phone: +1 (720) 504-7300 Ext 2

