



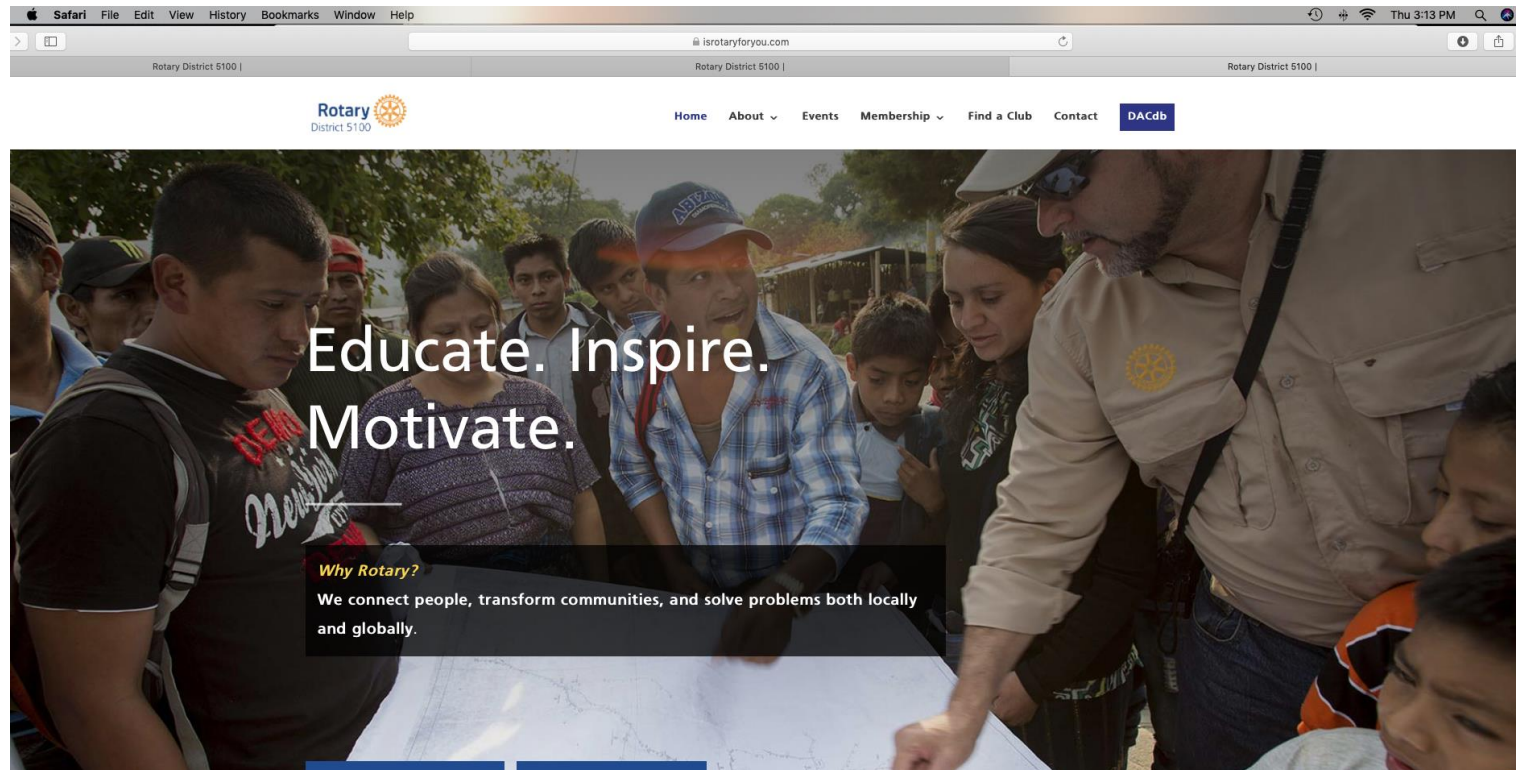
Grant Management Workshop

Grant Management Workshop

- **District Grant Application Training**
- **How to Login**

Grant Management Workshop

This is the screen you will see when you log into isrotaryforyou.com. There is a chance you will see little dashes on the top where I show DACdb. If you do click on them and it will have a drop box and just scroll down to DACdb.



Unless you have changed it your password is usually your Rotary member number. It can be found on your Rotarian Magazine or from your club Secretary.

DACdb

The District and Club database was developed to assist districts and clubs to meet their administrative reporting requirements to Rotary International, and to foster easier communications within the district for the district leadership, district committees, club leadership, and of course the members of Rotary Clubs.

Sign In

[Request Event ezLink](#)

User Name: (Usually your EMail address)

Password: (Usually your RI MemberID or Last Name)

Club Number: Not required **unless** you are an AG or District Officer

Remember Me: ☒ **DO NOT check this on public systems (e.g., libraries, internet cafes)**

Login

[Forgot Password?](#)

DACdb Mobile



Have you tried
DACdb Mobile
yet?

<https://m.DACdb.com>

[Go To DACdb Mobile](#)

[Create DACdb Mobile Desktop ICON](#)

Grant Management Workshop

Click on my Club

https://www.dacdb.com/SecLogin3.cfm Rotary District 5100 |

DACdb Home Find My DATA My CLUB DISTRICT Help Admin Setup Rotary District 5100 - Beaverton Huot, Christine

DASHBOARD NAVIGATION

- Zone
 - Zone Statistics
- District
 - District Home Page
 - District Dashboard
 - District Statistics
- Club
 - Club Home Page
 - Club Dashboard
 - Club Statistics
- DACdb Updates
 - Users Conference 2019
 - DACdb Messages
 - New Interface Video
- Setup
 - Setup

Beaverton Home Page

District Headlines

Looking for interesting speakers? Check out these resources! Friday, January 17, 2020

Our District offers its club Program Chairs the options shown below for sourcing excellent and exciting programs. We recommend you take advantage of them.

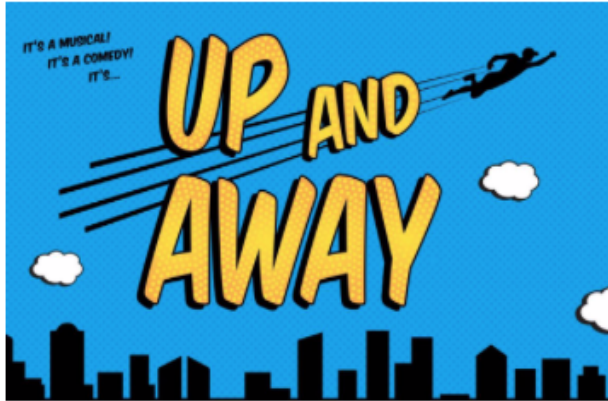
Sign up for the D5100 Speaker e-Newsletter!

Simply stated, this is an email announcement which is periodically sent out to all subscribers. The email passes along club recommendations for recent speakers who have been especially compelling. You can provide recommendations or sign-up to receive notices by sending an [email](#) to RC of East Portland Rotarian Brandon Wooters, who is our coordinator for this service.

We believe having excellent and compelling programs is a key component of being a vibrant club, and this service is available to help you find programs that will keep your members (and your

Rotary Night at the Theatre Friday, January 3, 2020

Mark your calendars for Rotary Night at the Theatre - Tigard
Rotary's NEW Fundraising event for the Tigard Rotary Foundation!



Grant Management Workshop

Click on Club Grants



Club Grants



Find Member



Club Members



Area



Club Assignments



Club Attendance



Calendar



Club Bulletins



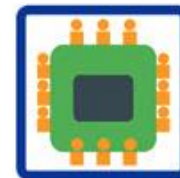
Club FILES



Club Information



Club Committees



eMeeting



Club Engagement



Club ezBulletins



Club ezBulletins



Club ezStory



Club Finance



Club Maps



PMail



PText



Reports



RI Compare



Club Sponsors




Club Statistics



Club Websites

Grant Management Workshop

On left hand side click on Club Grants View

 Home Find My DATA My CLUB DISTRICT Help Admin Setup Rot

GRANT NAVIGATION

[Grant Overview](#)
[Budget Overview](#)
[Grant Dashboard](#)
[District Grant View](#)
[Area Grant View](#) <
[Club Grants View](#)
[Grant Secure Files](#)
[Admin](#) <
[Form Configuration](#)
[Audit Club Signatures](#)
[Reports](#)

District Grants Overview [2019-20]



District grants offer clubs and districts flexibility in carrying out activities supporting the Foundation Mission. Districts are encouraged to fund 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. Districts will fund these activities 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 the activities undertaken with these funds. They may disperse these grant funds at their discretion for district- or club-sponsored activities.

- All activities funded with district grant funds must adhere to the eligibility requirements set forth in the terms and conditions for district grants.
- Districts must be qualified by the Foundation to receive district grant funds.

[2019-20] Projects:

 Rotary Opens Opportunities

Grant Management Workshop

If you have a grant in the system this will show or it may show this year's grants if you have still to close them.

Club Beaverton Grants [2019-20]













A summary is shown below of all grants submitted to the District from this Club.

Show Grant Round: All

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.

Approved

	Action	Project Name	Proj No	Lead Club Name	Status	Check No	Funded Amount	Requested DDF
<input type="checkbox"/>	   	Holiday Food and Toy Baskets	8504	Beaverton	Approved Grant	0875	1,000.00	1,000.00
<input type="checkbox"/>	   	Operation Warm Coats	8000	Beaverton	Approved Grant	0847	1,225.00	1,225.00
<input type="checkbox"/>	   	UGANDA AGRICULTURE PROJECT 2019-2020	7854	Beaverton	Approved Grant	0789	1,225.00	1,225.00
No Grants: 3							3,450.00	3,450.00

Grant Management Workshop

On the right hand side in the upper part of the slide you see “New Grant Request. Click on that-you are on your way!

mitted to the District from this Club.

gether on a Grant, the sponsor club is designated (*)

This will open a dialog where the Amount and Check

Change OrgYear

New Club Grant Request - Click Here to Create Grant

Show Grant Round:

All Grant Rounds

Apply Block Grant No

Grant Management Workshop

When this screen come up fill in details section by section being careful to save after each entry.


Details	Clubs Involved	Contacts	Application	Budget	Documents	Activity Log
Complete the basic Grant information form below. All the fields on this page must be entered to save the initial C Once the Grant is saved, the Budget and Document tabs will appear.						
* Project Name:	Adopt a Family 2019					
* Deleted:	<input type="button" value="No"/> Delete flag for Grants (Note: Level-7+ function)					
RI Project No:	<input type="text" value="8068"/> (By default, this will be set to the internal Grant No assigned)					
Priority:	<input type="button" value="Medium"/>					
* Org Year:	<input type="text" value="2019-20"/> (Level-7+ can change the OrgYear, if necessary)					
* Round:	<input type="text" value="1"/> (e.g., 1 or 2)					
* City:	<input type="text" value="PORTLAND"/>					
* State:	<input type="text" value="OR"/>					
* Country:	<input type="text" value="United States"/>					
Target Completion Date:	<input type="text" value="12/25/2019"/> Target completion date for this project.					
<div>Promoting Peace</div> <div>Fighting Disease</div>						

Grant Management Workshop

Go along Section by Section

Details	Clubs Involved	Contacts	Application	Budget	Documents	Activity Log	Signature Log	Interim Report	Final Report
---------	----------------	----------	-------------	--------	-----------	--------------	---------------	----------------	--------------

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:	<input type="text" value="Adopt a Family 2019"/>
* Deleted:	<input type="button" value="No"/> <small>Delete flag for Grants (Note: Level-7+ function)</small>
RI Project No:	<input type="text" value="8068"/> <small>(By default, this will be set to the internal Grant No assigned)</small>
Priority:	<input type="button" value="Medium"/>
* Org Year:	<input type="button" value="2019-20"/> <small>(Level-7+ can change the OrgYear, if necessary)</small>
* Round:	<input type="text" value="1"/> <small>(e.g., 1 or 2)</small>
* City:	<input type="text" value="PORTLAND"/>
* State:	<input type="text" value="OR"/>
* Country:	<input type="text" value="United States"/>
Target Completion Date:	<input type="text" value="12/25/2019"/> <small> Target completion date for this project.</small>



Grant Management Workshop

Be sure to list contacts, especially President and President Elect so they can go in and sign.

Details	Clubs Involved	Contacts	Application	Budget	Documents	Activity Log	Signature Log	Interim Report	Final Report
---------	----------------	----------	-------------	--------	-----------	--------------	---------------	----------------	--------------

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

Adams, William B. (Beaverton)
Appel, Frank B. (Beaverton)
Beighley, Harold S. (Beaverton)
Berg, Bill (Beaverton)
Blevins, John R. (Beaverton)
Bond, Jayne C. (Beaverton)
Boone, John (Beaverton)
Brandon, Robert F. (Beaverton)
Buchner, David (Beaverton)
Bush, Jack (Beaverton)

>>

<<

<< All

Members on Contact List:

Marron, Albert (Beaverton)
Roth, Thomas (Beaverton)
Taylor, Douglas J. (Beaverton)
Townsend, Denise (Beaverton)
Woodworth, Jon (Beaverton)

Grant Management Workshop


Don't put in today's date, put the actual date you wish to start the project.
Give the committee at least 2 weeks to review and approve it.

Details	Clubs Involved	Contacts	Application	Budget	Documents	Activity Log	Signature Log	Interim Report
---------	----------------	----------	-------------	--------	-----------	--------------	---------------	----------------

Fill out the detailed grant [8024] application form below.

Grant Timeframe

*Start Date:

*Expected Completion Date: 

*Address To Mail Grant Payment

*Name:

*Address:

*City:

*State:





Grant Management Workshop

Income and Expenses must match

Details	Clubs Involved	Contacts	Application	Budget	Documents	Activity Log	Signature Log	Interim Report	Final Report
---------	----------------	----------	-------------	--------	-----------	--------------	---------------	----------------	--------------



Income Items

Add Income Source

Action	Item Name	Club	DDF	Amount	Created	Modified
 	Beaverton Rotary Foundation Grant	Beaverton		\$2,250.00	Marron, Albert 11/06/19 05:06 AM	
 	D5100 Matching Grant	Beaverton	✓	\$1,000.00	Marron, Albert 11/06/19 05:07 AM	
Income Total:		1 out of 1 club(s) contributed		\$3,250.00	(DDF Request: \$1,000.00 , Other Funding: \$2,250.00)	

Expense Items

Add Expense

Action	Item Name	Club	Amount	Created	Modified
 	Food baskets for 80 families	Beaverton	\$3,250.00	Marron, Albert 11/06/19 05:09 AM	
Expense Total:			\$3,250.00		

Budget Summary

Description	Amount
Total Income (DDF+Club Funding):	\$3,250.00
Expenses Items:	(\$3,250.00)
Cash Flow (Income - Expense):	\$0.00

Grant Management Workshop

When all sections have been completed submit it for Club: Sign Grant approval: President and President Elect it is ready to submit for District approval.

It will show in red that it is ready for District Approval Another Click and you are on your way

Details	Clubs Involved	Contacts	Application	Budget	Documents	Activity Log	Signature Log	Interim Report
Submitted Grant for Club Approval								
Submitted By Marron, Albert			Member Position	11/06/2019 05:15 AM Date				
Grant Application Club Signatures								
Club Beaverton Signatures (2 of 2 Received)								
Townsend, Denise e/Signature			President-Elect Position	11/07/2019 09:25 PM Date				
Taylor, Douglas J. e/Signature			President Position	11/07/2019 03:51 PM Date				

Grant Management Workshop

Just about done!

- You will receive an email from me when your grant has been approved. A check will be in the mail as soon as we receive funding from RI, but you may start your project as soon as you get District approval.
- If I have any questions I will either email or call you.
- Be sure not to purchase or start a project until you have received District approval. This makes the project ineligible and Frank Grumpy.....

Grant Management Workshop

GOOD NEWS!!!

Next Year Rotary will have even more money for
District Grants

\$2,500 for Round 1 and \$2000 for Round 2

Grant Management Workshop

QUESTIONS?

No such thing as a dumb question
We are here to help!

Grant Management Workshop

**Good Luck on your Projects and don't forget
if you need help to call me.**

Christine Huot

Phone-503-244-5076

[Email-huotcm@gmail.com](mailto:huotcm@gmail.com)



Rotary Opens
Opportunities

Grant Completion Training

Tips and Examples

Christine Huot, Danette La Chapelle, Frank Appel



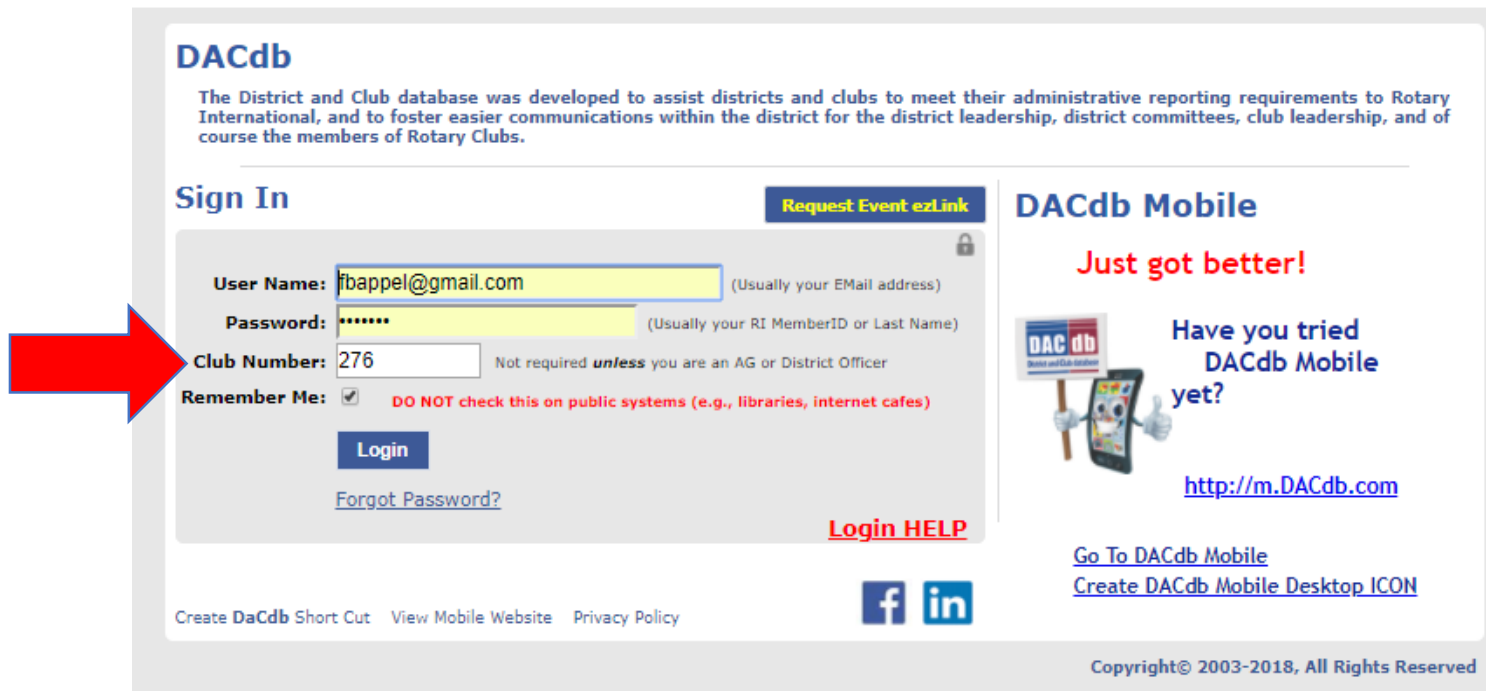
Rotary Opens
Opportunities

Grant Completion Deadline

- The following documents are due **30 Days after the completion date specified in the grant application:**
 - Final Report
 - Income and Expense Report
 - Receipts
- If difficulties are encountered, a grant may be extended up to one year after the approval date of the grant.
- **A grant extension request is required.**

Login Advice

- The entry of the **club number** is necessary to complete the final report and upload documents



DACdb

The District and Club database was developed to assist districts and clubs to meet their administrative reporting requirements to Rotary International, and to foster easier communications within the district for the district leadership, district committees, club leadership, and of course the members of Rotary Clubs.

Sign In [Request Event ezLink](#)

User Name: fbappel@gmail.com (Usually your EMail address)

Password: (Usually your RI MemberID or Last Name)

Club Number: 276 Not required *unless* you are an AG or District Officer

Remember Me: ☒ DO NOT check this on public systems (e.g., libraries, internet cafes)

[Login](#)

[Forgot Password?](#)

[Login HELP](#)

DACdb Mobile

Just got better!

Have you tried DACdb Mobile yet?

<http://m.DACdb.com>

[Go To DACdb Mobile](#)
[Create DACdb Mobile Desktop ICON](#)

Create DaCdb Short Cut View Mobile Website Privacy Policy

[f](#) [in](#)

Copyright© 2003-2018, All Rights Reserved

Assessing Your Grant

Below is an example of the Club Grants screen

- If necessary, click on the “**Grant Year**” tab in the upper left corner to change the grant year. (not shown on this screen).
- Identify your grant from the list and click on the “**pencil icon**” in the **Action** column to enter the grant file.

DAC db
District and Club database

Home Find CLUBS My CLUB My DATA Committees PMail Calendar NC Finance Reports **Grants** District PAGES Club PAGES Files FV

GRANT NAVIGATION

- Grant Overview
- Budget Overview
- Grant Dashboard
- District Grants
- Club Grants
- Grant Secure Files
- Admin
- Form Configuration
- Audit Club Signatures
- Help
- Setup

Club Beaverton 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.

Approved

	Action	Project Name	Proj No	Lead Club Name
<input type="checkbox"/>		Uganda Agriculture Project	4488	Beaverton
No Grants: 1				

Completed

	Action	Project Name	Proj No	Lead Club Name
<input type="checkbox"/>		BRC Operation Warm Coats 2017	4589	Beaverton
No Grants: 1				

Tip: If you access this page and the pencil icon is missing, you may have entered your club number incorrectly. Log out and repeat the log-in with the correct club number.

Filling Out the Final Report

- Click on the “**Final Report**” tab.
- Fill in the blank areas of the report.
- Click on the “**Save Final Report**” tab in the upper right had corner of this page (not shown on this screenshot).

Tip: The Final Report does not require a signature.

Tip: Do not alter the originally approved budget under the “Budget” tab.

Edit Grant: Uganda Agriculture Project [2017-18] ID=4488



Grant Status: **Approved Grant** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and f The Club needs to complete an Interim and/or Final report as required and submit for Club signatures and then District approval.

Details	Clubs Involved	Contacts	Application	Budget	Documents	Activity Log	Signatures	Interim Report	Final Report
---------	----------------	----------	-------------	--------	-----------	--------------	------------	----------------	--------------

We did not find an existing **Final Club Report** report to edit. A NEW Final Club Report report can be found below. When you have entered the requested information, click the **Submit Final Club Report** button at the top right. A PDF of the report will then be found under the Document Tab with today's date.

Note: The variables {%variable name%} will be entered by the system when the report is saved.

Reset Report

District Grant Individual Final Project Report

Please complete this form online for your District Grants Committee Chair. **Do not** send this form directly to TRF.

Rotary Club: Beaverton (276)

Project Title: Uganda Agriculture Project

Report Type: ☐ Interim (Progress) Report ☒ Final Club 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?

This project will provide training and inputs to 210 subsistence-level women farmers in Northern Uganda to help them produce more food and a greater variety of vegetables and fruits for their families and earn a modest cash income. SAS will work with local councils and Ministry of Agriculture extension staff to select and train 30 women from each of seven villages in better farming methods and will provide inputs of seeds, cuttings, tree seedlings and tools. The model for this project has been used successfully in five previous years and has helped over 800 women farmers to grow more food for their families and earn modest cash incomes. Training and provision of planting materials that can be planted again in successive years ensure sustainability.

2. How many people benefited from this project?

Completing the Income and Expense Form

District Grant Income and Expense Report

FILL OUT THIS FORM AND SCAN IT ALONG WITH YOUR RECEIPTS AND UPLOAD THEM INTO THE DOCUMENTS SECTION OF YOUR DISTRICT GRANT (If possible, scan them into a single document)

Rotary Club: _____
Grant # _____

1. File your District Grant's Final Report in DACdb:

When you fill out and Save the Final Report, it will be automatically filed as a .pdf file in the Document Section of your grant file. No signatures are required on the Final Report.

2. List ALL the Final Income and Final Expenses below.

- Download the Income and Expense form. The link for the form is at the bottom of the Final Report Form.
- The form **must be signed by the person completing the report.**
- Tips:** The income and expense sections **must balance**. The form has a line for recording **unspent budget**.
- All expenses must be expended in the grant period for the activities of the grant.

Income & Expenses must equal each other:

Income

Sources of Income		Amount
1. Budgeted District grant funds (received from the District)		2000
2. Budgeted funds from our Rotary Club (application budget)		2000
3. Cash from the Rotary Club of _____		
4. Cash from the Rotary Club of _____		
5. Other Funding (specify)		
6. Other Funding (specify)		
Total Project Income		4000

Expenses (please be specific and add an attached listing as needed)

Expense Items (receipts required)	Name of Supplier		Amount
1. Supplies			1000
2. Equipment			2900
3.			
4.			
5.			
6.			
7.			
8.			
Unspent Approved Budget			100
Total Project Expenses (must equal income)			4000

Refunds

- A refund may be required if:
 - The under-expenditure results in a club expense that is less the District match,
 - The activity of the grant is clearly incomplete, or
 - The following pillar requirements are not met:
 - Bring benefits to at least 6 people
 - Short-term in nature, local or international
 - Active participation by Rotarians
 - Promote awareness of Rotary
- The formula: **Refund = 50% of the Club expense that is less than the District match.** *
- Do not process a refund until the Grant Auditor has reviewed and approved the final report. The Grant Auditor will provide refund instructions.

* Formula applies only to clubs with a 1:1 match requirement.

Uploading Documents

- Scan the Income and Expense form and receipts. **Avoid photo copies—they are frequently unreadable.**
- The receipts should be numbered to correlate with the expense numbers on the I and E form.
- Click on the “Documents” tab.
- Click on the “Upload File” button.

Edit Grant: Uganda Agriculture Project [2017-18] ID=4488



Grant Status: **Approved Grant** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files Club needs to complete an Interim and/or Final report as required and submit for Club signatures and then District approval.

[Details](#) [Clubs Involved](#) [Contacts](#) [Application](#) [Budget](#) [Documents](#) [Activity Log](#) [Signatures](#) [Interim Report](#) [Final Report](#)

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.

[Upload File](#) [Add Folder](#)

Navigation: [Home](#)

Action	Type	File Name	Modified	Size	Attributes
		Backup	2017-08-23 14:24:35	0 KB	
		Documents	2017-07-31 14:38:01	0 KB	
		Images	2017-07-31 14:38:01	0 KB	
		BRC International Project MOU 2017-2018[1].pdf	2017-08-17 15:10:26	1,147 KB	
		GrantApplication.html	2017-08-23 14:24:35	11 KB	
3 Directories 2 Files			Directory Space Used:	1,158 KB	

Uploading Documents (continued)

- Click on the “**Choose File**” button to find your file in your computer.
- Click on the “**Upload File**” button.

Tips: Do not load documents to the Backup, Documents, or Images sub-files under the “Documents” tab.

Do not use any symbols in the file names of your documents. The system will not accept the upload. (for example: the symbols on the upper row of your keyboard)

After you have completed the upload process, check to make sure it uploaded by clicking on the uploaded file. If not, check for file name symbols.

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:

Choose File No file chosen

Option:

☐ Replace file?

Cancel

Upload File

Refunds

- A receipt is evidence that the club has incurred an expense.
- Sometimes it is impractical to obtain a traditional receipt. Acceptable alternatives include:
 - A thank-you acknowledgement for a project contribution. The amount of the contribution should be specified.
 - A copy of a cancelled check, check stub or check book entry.
 - An invoice with a “Paid” stamp.

The example at the right may be supporting documentation, but it is not valid evidence of a club expense.

Sales Quotation

Sold To:		Ship To:	
[Redacted]		[Redacted]	
Attn:		Bill To:	
Phone:		[Redacted]	
Fax:		[Redacted]	

QUOTE ID	CUSTOMER P.O.	PAYMENT TERMS		FREIGHT TERMS	
41977		Due on receipt		Freight billed	
QUOTE DATE	CUSTOMER ID	SALES REP ID	TERRITORY	SHIPPING METHOD	
10/6/2017	34311				

LINE #	DESCRIPTION	QUANTITY	T	X	UNIT PRICE	EXTENDED PRICE
1	STATION #5/10 - LEG STRETCH/PUSHUP	1			\$615.60	\$615.60
2	STATION #6/10 - BODY RAISE/REVERSE P/U	1			\$690.00	\$690.00
3	STATION #7/10 - BALANCE WALK/HEARTBEAT	1			\$924.00	\$924.00
4	STATION #6/20 - SITUP/LEG RAISE	1			\$1,011.60	\$1,011.60
5	STATION #7/20 - QUAD CLIMB/QUAD SIT	1			\$656.40	\$656.40
6	STATION #11/20 - HAND WALK	1			\$1,053.60	\$1,053.60
7	STATION #13/20 - BAR JUMP	1			\$777.60	\$777.60
8	STATION #15/20 - BODY TUCK	1			\$1,104.00	\$1,104.00
9	STATION #16/20 - OVERHEAD LADDER	1			\$1,258.80	\$1,258.80

98-1920-134-934-000-410	SUB TOTAL	\$8,091.60
\$8069	FREIGHT CHARGES	\$1,150.00
99-1111-134-800-000-410	TOTAL ORDER AMOUNT	\$9,241.60
\$1172.60		



Rotary Opens
Opportunities

Changing Status

- **Do not change the status of the grant.**
 - If the final report has been completed and saved and the supporting documents have been uploaded you are done.
 - Notify the Grant Auditor that the grant is ready for review. An email link to the Auditor is located at the bottom of the Final Report page.

GRANTS COMPLETION

Thank you for taking the 2020-21 District Grant Training.

To get credit for your club you **MUST** email office@district5100.org and advise Liz of your name and club.

In Rotary Service
District Grant Committee.

District Grant Assistance

For Application Help and Advice:

Christine Huot, Grant Chair

Email: huotcm@gmail.com

Phone: 503-244-5076

For Finalization Help and Extension Requests:

Danette La Chapelle, Grant Auditor (after June 30, 2020)

Email: danette.lachapelle@iqcu.com

Phone: 360-601-8396

Frank Appel, Grant Auditor (until June 30, 2020)

Email: fbappel@gmail.com

Phone: 970-202-2622



**Rotary Opens
Opportunities**