Grant Management Workshop
• District Grant Application Training

• How to Login
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.
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Click on my Club

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!

Friday, January 3, 2020

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
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District grants offer clubs and districts flexibility in carrying out activities supporting the Foundation Mission. Districts are encouraged to explore opportunities 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 can request up to 50 percent of their District Designated Fund (DDF) in one annual block grant. Districts are responsible for deciding how the funds will be used. 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 the grant.
- Districts must be qualified by the Foundation to receive district grant funds.

[2019-20] Projects:
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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]

The 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.

<table>
<thead>
<tr>
<th>Action</th>
<th>Project Name</th>
<th>Proj No</th>
<th>Lead Club Name</th>
<th>Status</th>
<th>Check No</th>
<th>Funded Amount</th>
<th>Requested DDF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Holiday Food and Toy Baskets</td>
<td>8504</td>
<td>Beaverton</td>
<td>Approved Grant</td>
<td>0875</td>
<td>1,000.00</td>
<td>1,000.00</td>
</tr>
<tr>
<td></td>
<td>Operation Warm Coats</td>
<td>8000</td>
<td>Beaverton</td>
<td>Approved Grant</td>
<td>0847</td>
<td>1,225.00</td>
<td>1,225.00</td>
</tr>
<tr>
<td></td>
<td>UGANDA AGRICULTURE PROJECT 2019-2020</td>
<td>7854</td>
<td>Beaverton</td>
<td>Approved Grant</td>
<td>0789</td>
<td>1,225.00</td>
<td>1,225.00</td>
</tr>
</tbody>
</table>

No Grants: 3

Total Amount: 3,450.00
Total Requested: 3,450.00
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!
When this screen come up fill in details section by section being careful to save after each entry.

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

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.

<table>
<thead>
<tr>
<th>Details</th>
<th>Clubs Involved</th>
<th>Contacts</th>
<th>Application</th>
<th>Budget</th>
<th>Documents</th>
<th>Activity Log</th>
<th>Signature Log</th>
<th>Interim Report</th>
<th>Final Report</th>
</tr>
</thead>
</table>

- **Project Name:** Adopt a Family 2019
- **RI Project No.:** 8068
  - By default, this will be set to the internal Grant No assigned.
- **Priority:** Medium
- **Org Year:** 2019-20
  - Level 7+ can change the OrgYear, if necessary.
- **Round:** 1
  - (e.g., 1 or 2)
- **City:** PORTLAND
- **State:** OR
- **Country:** United States
- **Target Completion Date:** 12/25/2019
  - Target completion date for this project.
Be sure to list contacts, especially President and President Elect so they can go in and sign.
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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.

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

**Grant Timeframe**

- **Start Date:** 10-1-19
- **Expected Completion Date:** 12/15/2019

**Address To Mail Grant Payment**

- **Name:** White Salmon-Bingen Rotary
- **Address:** PO Box 251
- **City:** White Salmon
- **State:** WA
Income and Expenses must match

### Income Items

<table>
<thead>
<tr>
<th>Action</th>
<th>Item Name</th>
<th>Club</th>
<th>DDF</th>
<th>Amount</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Beaverton Rotary Foundation Grant</td>
<td>Beaverton</td>
<td></td>
<td>$2,250.00</td>
<td>Marson, Albert 11/06/19 05:06 AM</td>
</tr>
<tr>
<td></td>
<td>DS100 Matching Grant</td>
<td>Beaverton</td>
<td>✔</td>
<td>$1,000.00</td>
<td>Marson, Albert 11/06/19 05:07 AM</td>
</tr>
</tbody>
</table>

**Income Total:** 1 out of 1 club(s) contributed **$3,250.00**  
(DDF Request: **$1,000.00**, Other Funding: **$2,250.00**)

### Expense Items

<table>
<thead>
<tr>
<th>Action</th>
<th>Item Name</th>
<th>Club</th>
<th>Amount</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Food baskets for 80 families</td>
<td>Beaverton</td>
<td>$3,250.00</td>
<td>Marson, Albert 11/06/19 05:09 AM</td>
</tr>
</tbody>
</table>

**Expense Total:** **$3,250.00**

### Budget Summary

- **Total Income (DDF+Club Funding):** **$3,250.00**
- **Expenses Items:** **($3,250.00)**
- **Cash Flow (Income - Expense):** **$0.00**
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.
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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 Danette Grumpy…..
Next Year Rotary will continue to provide funding for District Grants at the following levels.

$2,500 for Round 1 and $2000 for Round 2
QUESTIONS?

No such thing as a dumb question
We are here to help!
Good Luck on your Projects and don’t forget to call if you need help.

To June 30, 2021
Christine Huot Phone: 503-244-5076 Email: huotcm@gmail.com

July 1, 2021 and on
Nancy Docekal Phone: 503-784-1040 Email: ndocekal@me.com
SECOND PRESENTATION

• This section must be reviewed as well in order to meet the criteria for completing the District Grant training.
District Grant Completion Training

Tips and Examples
Christine Huot, Danette La Chapelle, Nancy Docekal, Frank Appel
Date April 17, 2021 (rev.)
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.
Log-On Advice

The entry of the **club number** is necessary to complete the final report and upload documents.
Accessing Your Grant

• If necessary, click on the “Grant Year” tab in the upper right 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.

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.
Completing the Income and Expense Form

- 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 during the grant period for the activities of the grant.

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)

<table>
<thead>
<tr>
<th>Rotary Club:</th>
<th>Grant #:</th>
</tr>
</thead>
</table>

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.

Income & Expenses must equal each other:

<table>
<thead>
<tr>
<th>Income Sources of Income</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Budgeted District grant funds (received from the District)</td>
<td>2000</td>
</tr>
<tr>
<td>2. Budgeted funds from our Rotary Club (application budget)</td>
<td>2000</td>
</tr>
<tr>
<td>3. Cash from the Rotary Club of __________________________</td>
<td></td>
</tr>
<tr>
<td>4. Cash from the Rotary Club of __________________________</td>
<td></td>
</tr>
<tr>
<td>5. Other Funding (specify)</td>
<td></td>
</tr>
<tr>
<td>6. Other Funding (specify)</td>
<td></td>
</tr>
<tr>
<td><strong>Total Project Income</strong></td>
<td><strong>4000</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expense Items (receipts required)</th>
<th>Name of Supplier</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Supplies</td>
<td></td>
<td>1000</td>
</tr>
<tr>
<td>2. Equipment</td>
<td></td>
<td>2900</td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Unspent Approved Budget</strong></td>
<td></td>
<td>100</td>
</tr>
<tr>
<td><strong>Total Project Expenses (must equal income)</strong></td>
<td></td>
<td>4000</td>
</tr>
</tbody>
</table>
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: \( \text{Refund} = 50\% \text{ of the Club expense that is less than the District match.} \) *
• 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 photocopies—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.
• 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.
Receipts

- 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.
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.
District Grant Assistance

For Application Help and Advice:
Nancy Docekal, Grant Chair
Email: ndocekal@me.com
Phone: 503-784-1040

For Finalization Help and Extension Requests:
Danette La Chapelle, Grant Auditor
Email: danette.lachapelle@iqcu.com
Phone: 360-601-8396