

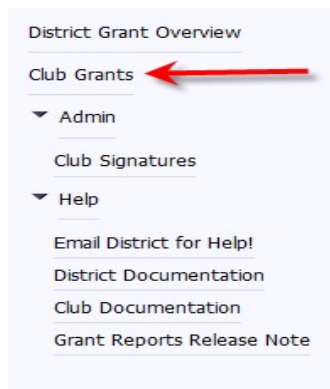
DaCdb ON-LINE GRANT MANAGEMENT

ENTERING YOUR GRANT

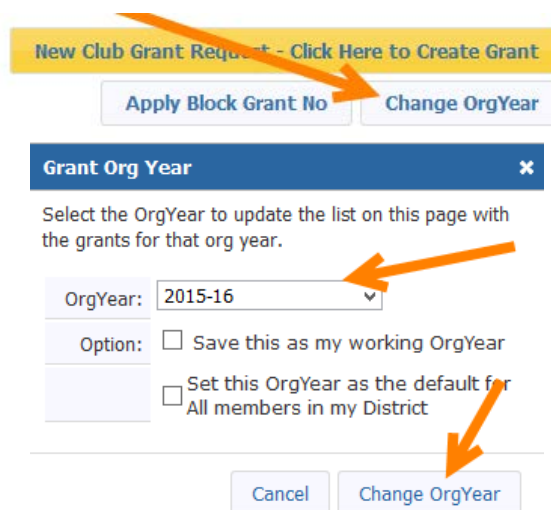
- Log into the District Database - www.directory-online.com/Rotary. Be sure to use your club number when logging in so you can see the advanced tabs.
 - The person preparing the grant application must be a level 3 or higher to access the Grants tab. If the club member is not a level 3, please change them to a level 3 to work on the grant.
 - One club member needs to sign off on the grant before it is submitted for approval. The club must be Grant Certified (that means a club representative attended the Grants Seminar and submitted the certification form - any questions, check with PDG Mike Hart - 908-294-2108 (m)).
- Click on the Grants Tab



- Click on the Club Grants on the left side menu



- Change Org Year to the CURRENT Rotary year; it may show the prior year.



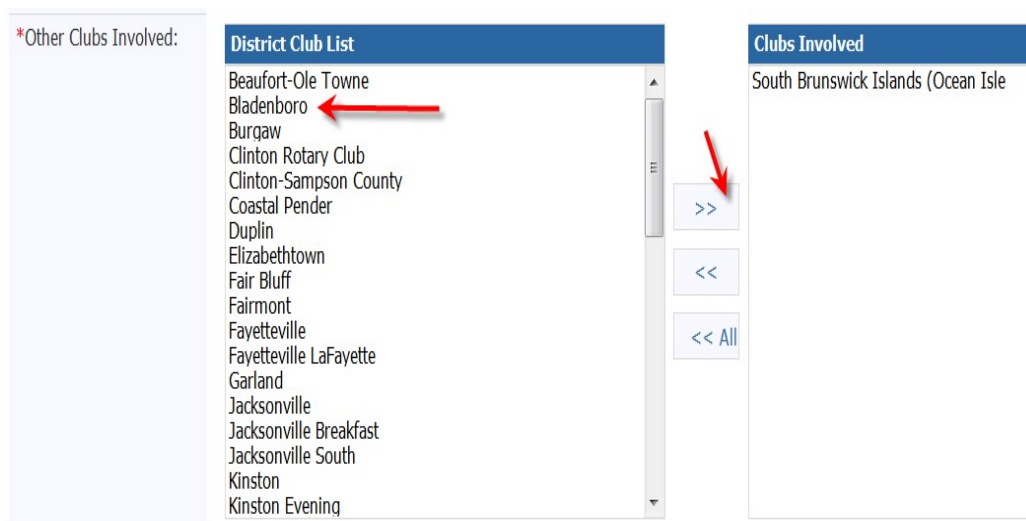
- Once the correct year is selected, click on New Grant Request



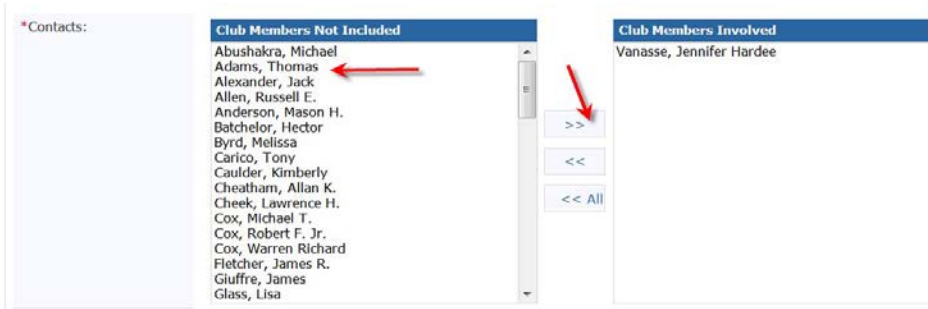
- There are three pages to complete on the New Grant Request
 - Details
 - Contacts
 - Application



- Details
 - This page contains general information about the grant.
 - Simply complete each field. Nothing can be left blank. If there is no answer, put “n/a”.
 - Give a brief description regarding the project.
 - If there is more than one club involved in the project, you will move those clubs over to the right side of the page. Click on the club name then click the double arrow.
 - IMPORTANT:** The Title of the Grant is limited to 30 characters including spaces. The Country is limited to 50 characters including spaces. The City is limited to 50 characters including spaces.



- Contacts
 - This is a list of the club members who will be working on the preparation of the grant and are responsible for collecting receipts, money, closure, etc. Simply move the names from the left to the right side. Two names are required. These individuals will be the signers of the grant.



- Application
 - This page is the application itself. Each section must be completed and the two boxes at the bottom need to be checked. Please make as detailed as possible. The project objectives will automatically appear on the final report so be very careful when entering this information and make it as thorough as possible.

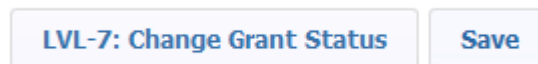
Yes, I Understand and accept the terms of the Club Statement Agreement.

Trustee Guidelines & Matching Grant Awards Terms & Conditions

By signing this grant request, I confirm that our Rotary Club is requesting a District Gra approved guidelines and the Terms and Conditions of Matching Grant Awards. All of the

Yes, I Understand and accept the terms and conditions.

- Click on the Save button



- You now have a draft grant. A new ID number appears on the top of the page next to the year

Edit Grant: test [2016-17] ID=2273

Grant Status: **Draft** (1)
 Enter the required information for this Grant, and submit the Grant for Club Signatures (Click the [Collect Club Signatures] button).
 This will start the process to collect the required number of club signatures prior to submitting the Grant to the District for approval.

Details | **Contacts** | Application | Budget | Documents

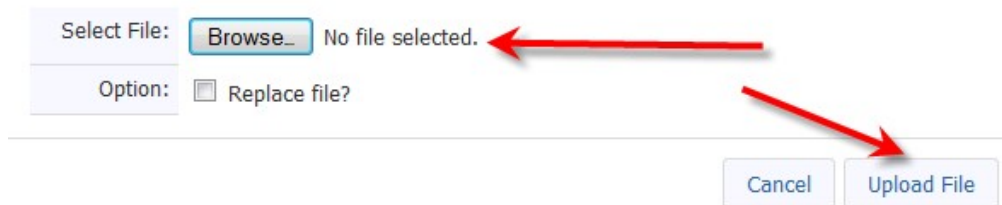
- A complete budget is required. Complete both the income and expense section. These will be adjusted with actual numbers when it is time to complete the Final Report.
- Funding should include all sources, including outside sources. Include name of the source and the amount you will be receiving.
- Expenditures should be itemized and include any estimated expenses for the project.
- If you have any letters of commitments, copies of quotes and other documentation, please upload them under the Document Tab.
 - Click on the Document Tab



- Add documents by clicking on the upload file or add a folder and then upload files in the folder.



- Browse your computer for the file and click on add. Do not use any type of punctuation in the naming of your documents.



- At this point, SAVE your grant. You can never save too often!





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

SIGNING & SUBMITTING A GRANT

- Each club needs one signature. If other clubs are involved with your grant, you need one signature from each club. The authorized signers have been identified by the District. If you need someone else authorized, contact Michael Townley (info below.)

- The authorized signer one will click on the pencil icon to edit the grant

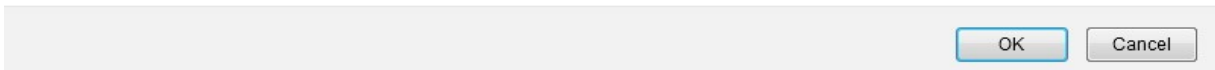
Action	Project Name	Proj No	Club	Status	Requested DDF	Approved DDF	Other Funding	Total Project Budget
 	TEST Grant #4	445	South Brunswick Islands (Ocean Isle Beach)	Draft	\$1,000.00	\$0.00	\$0.00	\$1,000.00
Totals:					\$1,000.00	\$0.00	\$0.00	\$1,000.00

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

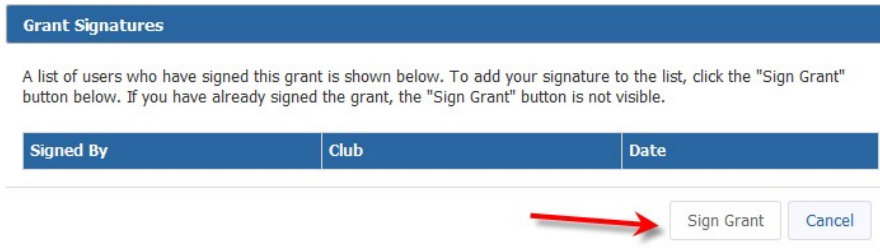


- The following message will appear

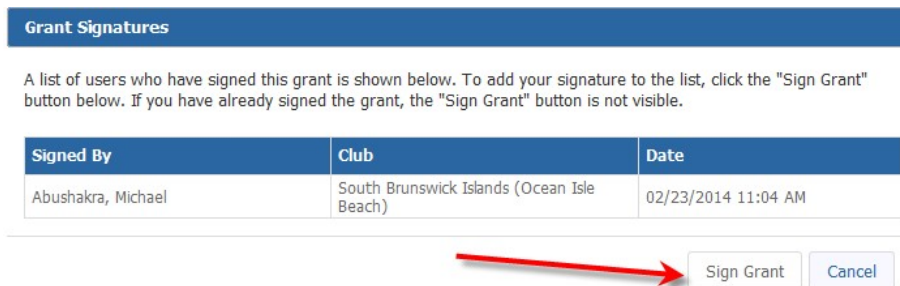
Please confirm - you are about to start the process to collect the club signatures on this Grant application. If you continue, the next step is for the Club to get the required number of signatures so the Grant can be submitted to the District for Approval. OK, to Continue?



- He/she will click OK. Then click on Club: Collect Grant Signatures again. A new box will appear that says "Sign Grant"




- If there is more than one club involved, their representatives can now sign the grant. They will follow the same steps as above. Click on the pencil to edit the grant, click on Club: Sign Grant Application. The club signature box will appear again, but this time they will see the first signer's name and date on the box, then they will click on sign.



- The last person to sign submits the grant for approval.



- The status of your grant will now say “Submitted Grant for District Approval”

Action	Project Name	Proj No	Club	Status
	TEST Grant #4	445	South Brunswick Islands (Ocean Isle Beach)	Submitted Grant for District Approval
				Totals:

- 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. The grant will be changed back to draft if additional information is needed. You can then add the additional information and re-sign the grant.

If you need assistance, contact Sharan Jain at jainsh.sj@gmail.com or 732-801-8856 or Michael Townley at secretary7510@rotarynj.org or 908-227-6782.

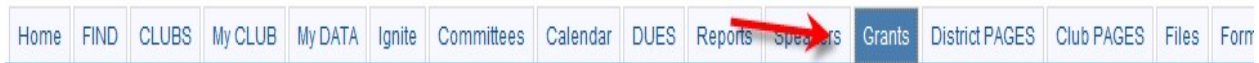
FUNDING A GRANT

- All grant applications must be reviewed and approved by the Rotary Foundation.
- After the Rotary Foundation and the District Grants Subcommittee have approved a grant application, the originating club will receive a check for the award amount.
- Clubs must use the grant money for the purpose identified in the grant application.
- A Final Report is required upon conclusion of the project AND before you can apply for a grant in the next Rotary year. That means your project must be completed and your final report must be submitted no later than June 30 of the current Rotary year.
- See next page for Final Report guidelines..

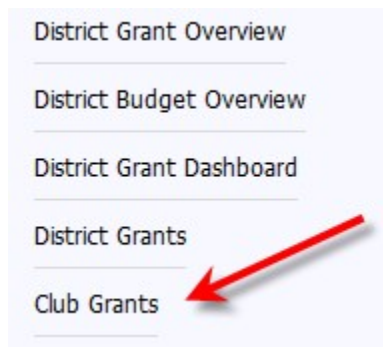
GRANT FINAL REPORT

COMPLETING THE FINAL REPORT

- Once you have completed the project you must complete an on-line Final Report to receive your funds
- Go to the District Database - www.directory-online.com/Rotary - and log in.
- Click on the Grants Tab



- Click on Club Grants on left side menu



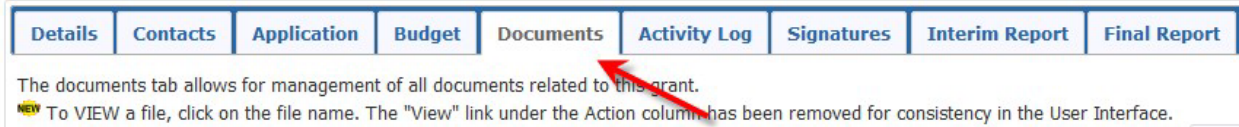
- Click on the edit button (pencil) of the grant you wish to complete.

Approved						
<input type="checkbox"/>	Action	Project Name	Proj No	Club	Status	Requested DDF
		Boys Girls Club Bus	29	South Brunswick Islands (Ocean Isle Beach) Southport (*)	Approved Grant	\$2,000.00
		test 2	412	South Brunswick Islands (Ocean Isle Beach)	Approved Grant	\$1,000.00
		TEST Grant #4	445	South Brunswick Islands (Ocean Isle Beach)	Approved Grant	\$1,000.00
Totals:						\$4,000.00

- 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. Your total Expenses should equal or exceed your Revenues.



- Scan photos of the project and Rotary involvement, all receipts, and copies of any checks you may have disbursed and save them as “jpg” files. Upload them to the Documents tab. THIS IS MANDATORY. If you need assistance, please contact Sharan Jain or Michael Townley.



- Click on the Final Report Tab



- Our District will only use the Final Report; we do not use the Interim 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” file. Contact Michael Townley with questions.
- The Final Report must be completed by the individual in the club who prepared the grant request
- When you are finished with the Final Report, click on the “Save Final Report” to save your work.

Grant Status: **Approved Grant** (6)

This Grant is **locked** and you are unable to save changes in its current state. You may continue to add expenses, upload files and file reports.

This Grant is approved. When the Club is sent their funding check, mark the Grant as Funded.



- The individuals who signed the grant request will need to sign the “Final Report”
- After you save the final report you are ready to sign it. The first Club Signer will click on the edit button, go to the Final Report and click on “Club – Collect Final Signatures”



- Then click on “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
Dixon, Lee Daniel Jr	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 12:08 PM
Vanasse, Jennifer Hardee	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:10 AM
Smith, Dale	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:59 AM
Abushakra, Michael	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:04 AM



- If there is a second club involved (or third or more), those clubs’ signers of the grant will now go to the database and click on the pencil to edit the grant. They will click on the “Club:Sign Final Report” button.



- The sign grant box will appear; they 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
Dixon, Lee Daniel Jr	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 12:08 PM
Vanasse, Jennifer Hardee	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:10 AM
Smith, Dale	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:59 AM
Abushakra, Michael	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:04 AM
Abushakra, Michael	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 02:23 PM



- The last signer will then click on “Submit Final Report”



- The status of your grant will now be changed to “Submitted final report for District Approval”

	TEST Grant #4	445	South Brunswick Islands (Ocean Isle Beach)	Submitted Final Report for District Approval	\$1,000.00
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- The Grants Subcommittee will do an audit on Final Reports and will contact the club if any additional information is needed or if there are any unspent funds to be returned.

--End--