District Grant FAQS

Navigating to the District Grant Application

Q: How do I navigate to the DACdb Grant Application?

A: Click on the District Grants Icon to access the District Grants Application. This can be done either from the "My Club" or the "District" page in DACdb.

Q: I don't see the District Grants Icon.

A: The Grants Icon can be added by clicking on the "Gear" in the top right hand corner and then dragging "Grants" from "Available Icons" into "Displayed Icons".

Q: OK; I got to the Grant Application page; now what do I do?

A: Click on "Club Grants View" and set the "Change the Org Year" to 2023-24.
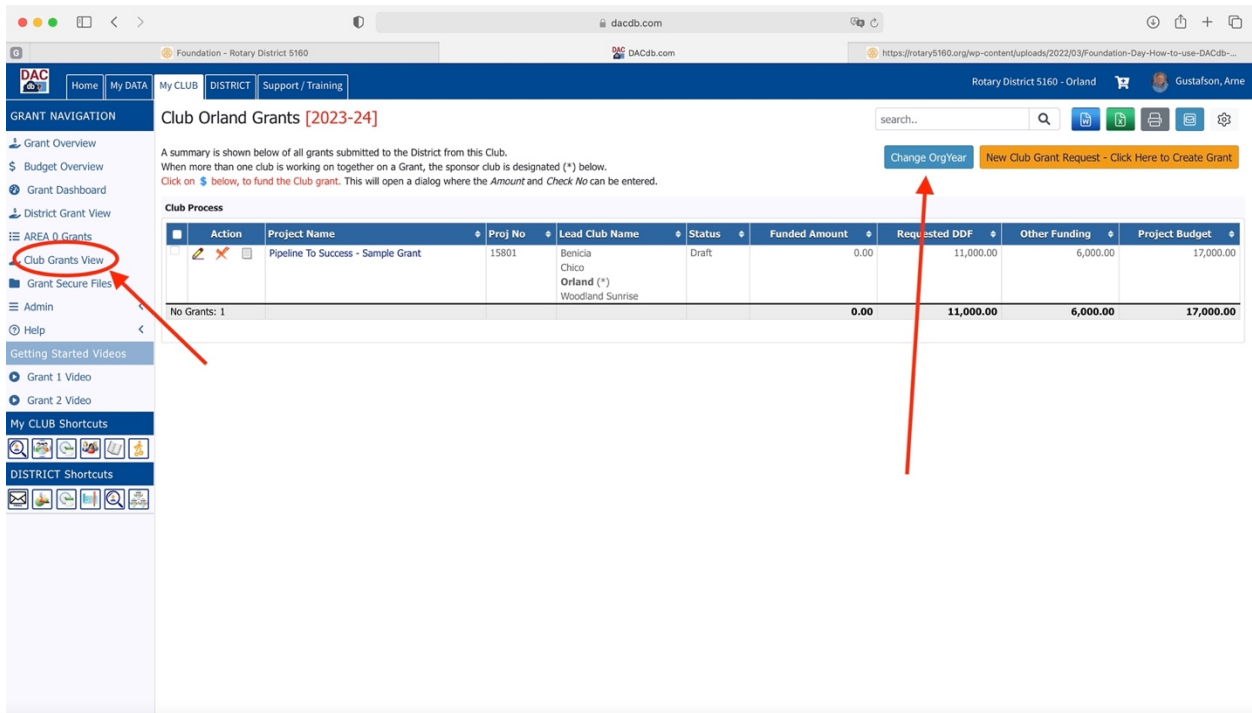
Initiating a New Grant Application

Q: How do we go about setting up our online Grant Application?

A: Click on "New Club Grant Request". You will receive a prompt that tells you to create Club Signatures.
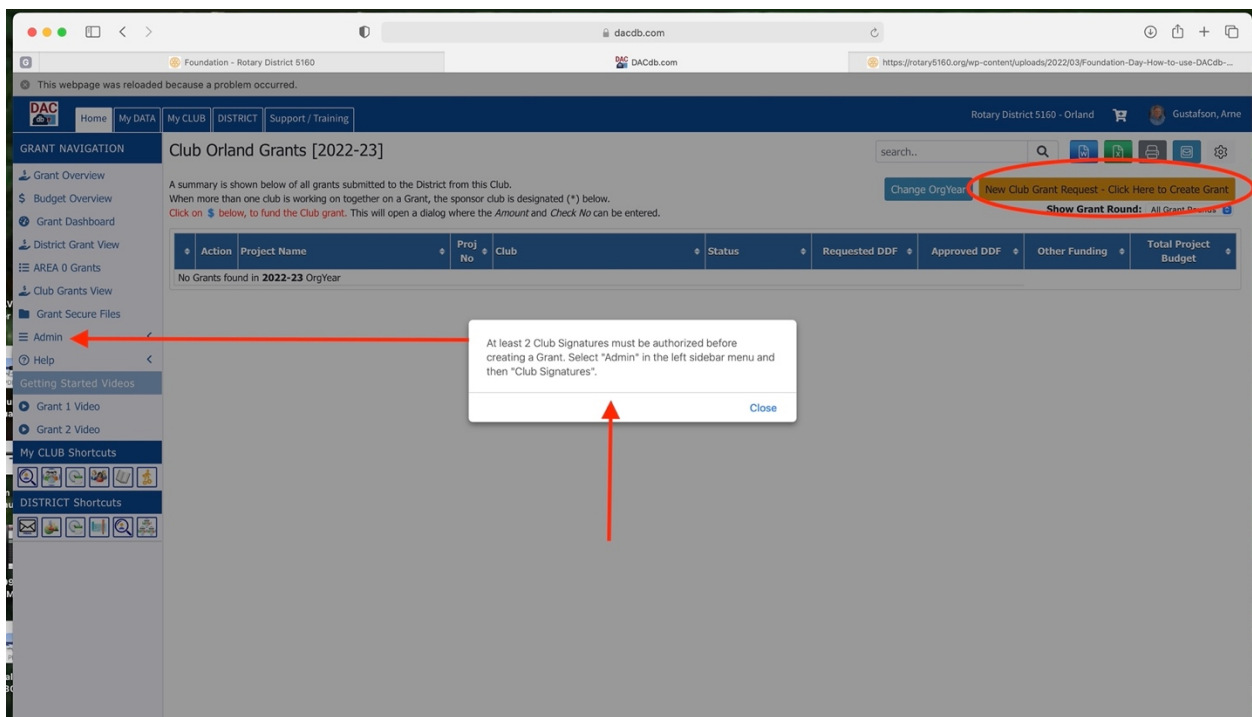
Q: I am not able to authorize signatures to create a new grant.

A: The current club president must authorize the signatures to create the grant. There must be two authorized signers.
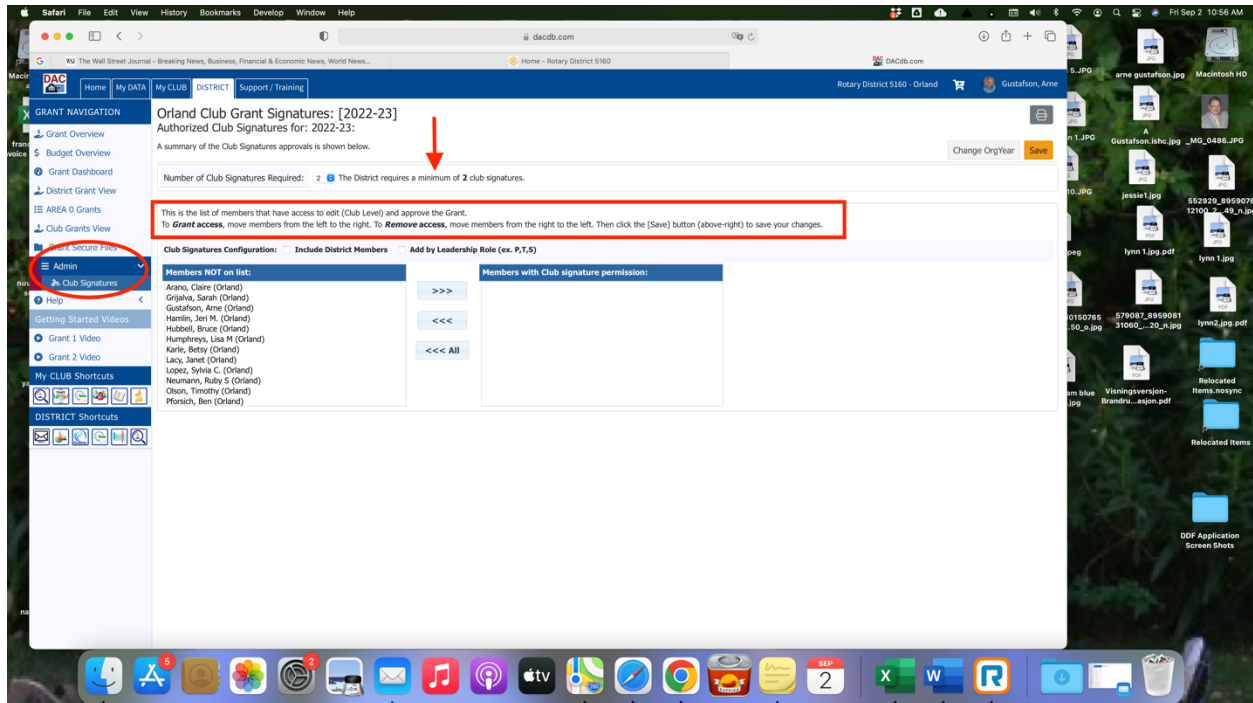
Q: Who should be the authorized signers on the grant application?

A: One should be the primary person responsible for preparing the application. The other should be either the current Club President or the President Elect.

Q: Should we have more than two authorized signers?

A: It depends. Only authorized signers are able to complete the online application form.   More signers can create confusion and make it more difficult to manage the application preparation. The ideal situation is to have one person complete the application with the second authorized signer (president or president elect) being the second authorized signer.

Q: We intend to have other clubs participate financially in the grant. Do they need to be authorized signers?

A: No. In fact, you should not have members of another club be included as an authorized signers. The lead club has all the responsibility for submitting and managing the grant.

Completing the Online Grant Application

Q: Can you explain how we go about completing the online application?

A: Once the authorized signatures are created, it is time to prepare the application. Tabs will appear at the top of the page. Just click on those tabs and type your information into the spaces provided. **Remember: Save your work often! You <u>must</u> click the "save" button or you will lose the work from that session.**

Q: What happens if I have problems filling out the application?

A: There are multiple sources of information to guide you through the grant application preparation.

- The D5260 District Grant Video 2018 is located on the District 5160 webpage, under the Foundation tab. While the video is several years old, the grant preparation process is the same today as it was then.
- The District 5160 webpage has a section, under the Foundation tab, for "Foundation Day". You will find a PowerPoint presentation called "How to use DACdb for Grants". This provides screen shots of relevant parts of the District Grant Application.
- The Club Grants page in DACdb includes a "Help" section. There is a video titled "Submitting a Club Grant Application" and a PDF file titled "Club Documentation". These two resources should answer any questions you may have.

Q: Aren't there individuals in District Leadership who can answer my questions?

A: Yes. However, remember 20 or more clubs will submit District Grant Applications and, as with all Rotarians, these people are volunteers and have other responsibilities. The first question they will ask when you request help is whether you have consulted the resources listed above.

Q: What if our club has never submitted a District Grant? Are there resources available to help guide us through the process of developing a successful District Grant?

A: Yes. The District has "Grant Mentors" to help you to develop a compelling grant proposal. Contact the Grant Manager or the Grant Committee Chair for more information.

Q: I have heard that the online application process is confusing and complicated. Are there some general suggestions you can make to help make the process easy to understand?

A: Yes. The following are some of suggestions.
- Start early. Form a committee to develop grant ideas that you take to your club.
- Designate a lead person to manage the grant and prepare the application. You will find the process much easier if there is a single point of contact.
- Have the appropriate club members attend the Foundation Day training. These include the current Club President, the Club President Elect, the Grant Preparer and the Club Treasurer. All of these individuals have a role in the district grant process.
- **READ** ! The training materials, the questions and supporting information in the application and the emails and other communications sent by the District Grant Team. Virtually all of your questions can be answered by reviewing the information that is summarized above.
- Hit the "Save" button often. Remember, any work not saved at the end of a work session will be lost.
- Don't wait until the last minute to enter your Club Foundation Goals in Rotary Central or to submit a Club MOU with all of the requested information complete. You may consider these items to be bothersome administrative tasks, but they are Rotary International requirements that must be completed in order for your grant application to be considered.

Submitting Your District Grant Application

Q: Our grant team had a difficult time collecting signatures and submitting the grant for district approval last year. Can you provide me with some information so we can avoid these problems this year?

A: Submitting the District Grant Application seems to be the area that Clubs have the most difficulty with. Here is a brief outline of the process.
- Once the grant has been completed and all of the documents uploaded you are ready to collect signatures and submit the grant for district approval.
- The first signer (usually the Grant Preparer) will click the "Sign Grant" button. This will lock the Grant Application (you will not be able to change information in the

application; however, you will still be able to upload documents and files) and it will change the Grant Status to "Submitted for Club Approval".
- Once the second signer clicks on the "Sign Grant" button the status will change to "Submitted for District Approval". At this point you are done!

Q: There is a button labeled "Revert to Draft". What is that for?

A: Sometimes situations occur where a modification needs to be made to the application after the first signer submits the grant for Club Approval. This button will reset the application to draft status and allow you to make changes. Remember, if the application is reset, the signature collection process needs to be re-started.

Q: Do we need signatures from other clubs who are contributing funds to the grant?

A: No; only the lead club needs to sign the grant (2 signatures required). In fact, the lead club is the sole party responsible for managing the grant and lead club members should be the only authorized signers.

Q: There is a paragraph at the top of the signature page that says signatures required from four clubs.

A: That is a DACdb message that we have been unable to change; you only need to have signatures from the lead club.

Q: Do we have to go through the signature collection and district approval process in both the Pre-Submittal and the Final Grant Application stages.

A: **YES!** Both the Pre-Submittal (due in May) and the Final Application (due in June) need to have signatures collected and be submitted to the district for approval. Do not wait until the last minute and make sure the authorized signers are available. Do not let your grant be rejected because you did not comply with the signature and submission requirements.

Interim and Final Reports

Q: I know that I need to submit interim and final reports for our grant. How do I do that?

A: The process is the same for both interim and final report. The following is a description of the process. If you need more assistance, DACdb includes a PDF document and a video that will walk you through the process step by step.

- In DACdb, click on the District Grants icon.
- Access Club Grants View.
- Click on the ChangeOrgYear button and select the year the grant was initiated.
- You will see a "pencil" icon at the right side of the grant. Click on the pencil to access the grant application.
- Open the Interim/Final Report Tab
- Complete the Report and upload the required documents.
- Collect the signatures and submit the report for District approval.

- Send an email to John Martin to let him know the report has been submitted.
- The interim report must be approved by the District before a final report can be filed.

Q: Who is authorized to sign the interim and final reports?

A: The authorized signers on the original grant application are the only ones who can sign the interim and final reports. In some cases, those individuals may have left your club. If that is the case, contact a member of the grant team for assistance.

Help!!

Q: I have never filled out a grant application on DACdb. Are there any sources of information to help me with the process?

A: There are many sources of information depending on your question. There are videos and step by step instructions on DACdb that will walk you through the application process. Here is a screen shot to show you where that information can be found.

Q: I still can't figure out to do even after I read your emails and looked at the videos and step-by-step instructions. Is there a District resource I can contact to get my questions answered?

A: Absolutely. Our grant support team is here to help. Here are their names and email addresses.

Grant Committee Chair (General Questions) -   Arne Gustafson at arne5160.grants@gmail.com
Grant Manager (DACdb support) -   Danie Schwartz at info@danieschwartz.com
Grant Stewardship (Finances and Reporting) - Jahn Martin at stewardship@rotary5160.org

General Questions

Q: Can we apply for District DDF that will used on a project outside of the U.S.?

A: The short answer is yes. District DDF can be used for smaller sized projects located outside of the U.S. However, District DDF is not intended for projects that might more appropriately be funded by a Global Grant. You will be expected to tell the Grant Review Panel why your project cannot be developed within the scope and criteria of a Global Grant project. If it appears that project funding can be developed within the Global Grant criteria, the Grant Review Panel will

likely suggest that you pursue a Global Grant project rather than applying for District Grant funds.

Q: What if our project is in the fundraising phase and we can't identify exactly how the grant funds will be spent?

A: District Grant funds must be spent within two years. However, in recent years District DDF has been oversubscribed. A project where fundraising has not been completed or where project plans have not been completed may be deemed to be a weak project by the Grant Review Committee and may be rejected. Remember, stewardship is an important part of the Grant Review process and uncertainty about the use of grant funds is weighed during the decision-making process.

Q: We understand that grant funds cannot reimburse previous expenses. What if our club has committed to funding for a specific project or expenditure and has written a check; however, the check hasn't yet been cashed. Can we stop payment on that check and replace it with grant funds?

A: In the past, projects have been rejected when funds have already been committed or advanced, even if the check hadn't yet been cashed. To be safe, the grant application should be for a new project that has not been funded by your club. If you have questions, you should direct them to the Grants Committee Chair.

Q: I have heard that Rotaract Clubs can now apply for DDF. Is that true?

A: Yes. However, this is a new area and the criteria for the funding of their grants and other stewardship issues are still being developed. For example, the continuity of leadership is not the same in a Rotaract Club as it is in a Rotary Club. It is likely that the sponsoring Rotary Club will have to take a role in ensuring that Grant policies and procedures are followed.