






# Checklist to Complete a District Grant (D7690)

				
<p><b>Draft</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 1. Plan the Project</li> <li><input type="checkbox"/> 2. Attend Grants Management Trng (Feb) and complete Club MOU (Apr 15).</li> <li><input type="checkbox"/> 3. Using correct Org Year, build request in DACdb</li> <li><input type="checkbox"/> 4. Ensure two Signatories named to authorize.</li> <li><input type="checkbox"/> 5. Fill out info in the Details, Clubs Involved, Contacts, Application Tabs &amp; SAVE</li> <li><input type="checkbox"/> 6. Fill out the Budget Tab (ensure matching for Club allocation)</li> <li><input type="checkbox"/> 7. Upload Club MOU under Documents Tab &amp; SAVE</li> </ul> <p><b>ACTION: AUTO EMAIL SENT TO ALL CLUB SIGNATORIES.</b></p>	<p><b>Authorization</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 1. Initiate Club Grant Signing Process by clicking Collect Club Signatures</li> <li><input type="checkbox"/> 2. First Signatory Starts by Clicking Club: Sign Grant Application</li> <li><input type="checkbox"/> 3. Each Signatory Accesses Grant &amp; Clicks Sign Grant</li> <li><input type="checkbox"/> 4. The Primary club rep responsible for the club's district grant request checks weekly to ensure all signatures are collected.</li> </ul> <p><b>ACTION: STATUS UPDATE SENT TO CLUB PRES &amp; AGs TWICE MONTHLY AFTER PETS</b></p>	<p><b>Submitted</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 1. Last Club Signatory must Click: Submit Grant For District Approval</li> <li><input type="checkbox"/> 2. The Club President Elect checks to ensure District Grant request is submitted. (May 31)</li> <li><input type="checkbox"/> 3. The Club President Elect reports to AG District Grant submitted in Presidents Meeting</li> </ul> <p><b>ACTION: AUTO EMAIL RECEIVED BY ALL SIGNATORIES GRANT SUBMITTED TO DISTRICT</b></p> <p><b>ACTION: STATUS UPDATE SENT TO CLUB PRES &amp; AGs TWICE MONTHLY AFTER PETS</b></p>	<p><b>Approved</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 1. District Grants Chair &amp; DRFC reviews District Grant request in DACdb – each signs</li> <li><input type="checkbox"/> 2. District Chair approves &amp; SAVES OR Rejects to return back to club for correction (JUN)</li> </ul> <p><b>ACTION: AUTO EMAIL SENT TO ALL CLUB SIGNATORIES THAT GRANT IS APPROVED</b></p> <p><b>ACTION: DISTRICT GRANTS CHAIR (ALONG WITH DG BUILDS DDF BLOCK DISTRICT GRANT (JUL-AUG)).</b></p> <p><b>DG &amp; DRFC SIGNS BLOCK DISTRICT GRANT (after Audit results);</b></p> <p><b>RI APPROVES BLOCK GRANT (after previous year Block District Grant Final Report is completed and approved)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 3. District Treasurer issues check and sends to DRFC to co-sign check.</li> <li><input type="checkbox"/> 4. DRFC sends check to Rotary Clubs for approved projects.</li> <li><input type="checkbox"/> 5. Club deposits check into Club Grant account.</li> </ul>	<p><b>Completion</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 1. The primary club rep responsible for the club's district grant initiates Final Report by recording actual income and expenses in Budget Tab and uploading documentation in Documents Tab &amp; SAVE</li> <li><input type="checkbox"/> 2. Click Final Report Tab and enter requested information &amp; SAVE</li> </ul> <p><b>ACTION: AUTO EMAIL SENT TO CLUB SIGNATORIES TO SIGN FINAL REPORT</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 3. Initiate Club Grant Signing Process by clicking Club Collect Final Signatures</li> <li><input type="checkbox"/> 4. First Signatory Starts by Clicking Club: Sign Final Report</li> <li><input type="checkbox"/> 5. Each Signatory Accesses Grant &amp; Clicks Sign Final Report and Sign Grant</li> <li><input type="checkbox"/> 6. Last Club Signatory must Click: Submit Final Report (May 15, next year)</li> </ul> <p><b>ACTION: AUTO EMAIL RECEIVED BY ALL SIGNATORIES FINAL REPORT SUBMITTED TO DISTRICT</b></p> <p><b>ACTION AUTO EMAIL RECEIVED FINAL REPORT APPROVED PENDING DISTRICT AUDIT RESULTS</b></p> <p><b>ACTION: STATUS UPDATE SENT TO CLUB PRES &amp; AGs TWICE MONTHLY UNTIL ALL GRANT FINAL REPORTS APPROVED</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 7. District Grant Subcommittee prescreens Final Reports to prepare for audit.</li> <li><input type="checkbox"/> 8. District Grants Chair &amp; DRFC reviews Grant Final Report in DACdb – each signs &amp; District Chair approves OR Rejects to return back to club for more documentation or corrections.</li> </ul> <p><b>ACTION: DISTRICT GRANT AUDIT: JUL-AUG</b></p>