

Grant Approval Process

SUMMARY:

As AOS chairs you are responsible for submitting your committee's approved Grant/Project and Check Request to CREF. As a part of the Grant Approval process an approved AOS Project Proposal needs to be submitted along with the Grant Request (Form 1) to CREF for its approval. However, if a Grant was approved for the same Project the previous Rotary year a new Grant approval (Form 1) is not required. Keep in mind it must be for the same purpose and same recipient/payee as the original approved Grant/Project.

PRELIMINARY STEPS FOR YOUR COMMITTEE TO TAKE:

1. Review the Club Board's approved list of the previous year's Grants/Projects and determine which Grants/Projects the committee wishes to take forward into this Rotary year.
2. Assign a budget amount to each of the Grants/Projects and determine how much of your budget is committed
3. Provide this information in written form (preferably soft copy) to the CREF Administrator
4. Start to review new proposed Grants/Projects. All new Grants/Projects must have an AOS Project Proposal form filled out and submitted to the AOS Committee for review and approval.

Grants/Projects done the previous RY and the AOS wishes to do it/them again this year

1. A grant/project done the previous Rotary Year (RY) may be done again in the new RY as long as:
 - The current RY's Club BOD has approved it to be done again. (On or before August 1st of each year the CREF Administrator will provide each AOS a list of the Club BOD approved grants);
 - The AOS committee has determined it wishes to do it again;
 - The grant/project is for the same purpose and has the same recipient/payee
2. In this instance neither a Form 1 nor an AOS Project Proposal are required to be submitted to CREF; instead:
 - Notify the CREF Administrator in writing (preferably soft copy) of the AOS's intent to do that grant/project again and provide the dollar amount the AOS allocated to it
3. At completion of project/grant, to request payment, submit a completed and signed CREF Form 3 * along with any applicable receipts to the CREF Administrator for CREF's processing and payment. (**NOTE:** If the grant/project request is for \$5,000 or more the designated AOS Chair must obtain the signature of the CLUB CFO who also must sign)

New Grant/Project or one previously done but with a different scope and/or payee/recipient

1. The grant/project champion submits a completed and signed AOS Project Proposal Form * to the AOS for their review and decision whether or not to approve the grant/project
2. The designated AOS Chair signs the approved Project Proposal Form* and completed Form 1* and submits both to the CREF Administrator for processing (preferably via soft copy)
3. The CREF Administrator will provide the forms to the CREF BOD
 - **NOTE:** If the project/grant is to a verifiable 501 c3, the CREF President or VP can approve the request). If not, the Form 1 and AOS Project Proposal will be submitted to the CREF BOD for their review and decision. (The CREF BOD meets the 3rd Wed. of each month.)
4. The AOS Project Proposal and Form 1 must be submitted to the CREF Administrator on or before the Friday before the CREF BOD Mtg.
5. The CREF Administrator will notify the designated AOS Chair of the disposition of the grant/project request once it has been reviewed by the CREF BOD
6. Once the project/grant has been approved and payment is desired a Form 3 will need to be completed and signed by the Project Champion and reviewed and signed by the designated AOS Chair (all applicable receipts must be attached).
 - **NOTE:** If the grant/project request is \$5,000 or more the designated AOS Chair must obtain the signature of the CLUB CFO who also must sign
7. The designated AOS Chair will then submit the completed and signed CREF Form 3* along with any applicable receipts to the CREF Administrator for CREF's processing and payment

*** Please plan to complete the AOS Project Proposal, Form 1 and Form 3 using the fillable pdf versions found in the lower right hand corner on CR.**