

**Rotary District 5500**

**District Grant Final Report 2020 - 2021**

INSTRUCTIONS

A. Preparing and submitting a District Grant Final Report:

Step 1: Review your approved project Application and collect all supporting documentation.

Step 2: Complete the attached Final Report Form. Indicate whether this is a **Progress** or a **Final Report**. Include all bank statements, receipts and copies of checks in order to document all expenditures of project funds. All three sections of the Final Report form must be complete and all expenses should be listed. **Those claims for reimbursement credit in excess of $50 must have a supporting receipt.**

Step 3: Include digital photos and public affairs announcements with the Final Report (if available).

Step 4: Submit your D5500 District Grant Progress or Final Report along with all supporting documentation to the D5500 District Grants Subcommittee (email to Joe Puett at jmpuett1@aol.com ).

B. Please note the following:

* Reports must be submitted using the attached form. Please type or print the report and retain a copy for your Rotary club records.
* Final Reports for D5500 funded projects must be submitted within 60 days following completion of the project but NLT May 1, 2021. If a project is not completed by the May 1, 2021 deadline a Progress Report must be submitted including all information as of that date and the anticipated project completion date.
* A request for an extension to the submission date for the Final Report will normally only be granted if an acceptable Progress Report has been submitted and approved.
* **Clubs must retain original receipts for all district grant funded expenditures and provide copies to the district for all expenditures in excess of $50. Both the district and the clubs must retain copies of all receipts related to grant funded expenditures in accordance with local laws for a period of at least five (5) years following closure of the grant.**
* If a project clearly demonstrates Rotarian involvement and is worthy of publication, you may wish to complete a *RI Newstip* article, available on the RI website. Please attach action photos showing Rotarian participation in the project.
* To assist you in preparing your Final Report you are encouraged to submit a draft copy of your report to the D5500 District Grants Subcommittee prior to obtaining club leadership signatures. This will expedite the review and may avoid many of the most common mistakes. If you choose to do this then coordinate directly with the District Grants Subcommittee Chair (Joe Puett at jmpuett1@aol.com ).

**D5500 District Grants Subcommittee Chair:** Contact Joe Puett at jmpuett1@aol.com or 2732 Brewer Dr, Sierra Vista, AZ, 85650.

Additional questions and assistance: Further information on Rotary Foundation Programs is also available at the Rotary International website at [www.rotary.org/grants](http://www.rotary.org/grants). Project Number (Assigned by D5500)

**Rotary District 5500**

**District Grant Final Report 2020 - 2021**

 Final Report Progress Report

Please print or type all information within this form

(NOTE: Additional space between questions may be added by simply typing on the form.)

Section I. Project Description (Refer to Section I of your approved District Grant Application and update this Section based on that information. Most of the time it will not have changed and can be copy/pasted into this Final Report Form.)

Project Name:

 (Descriptive Title)

1. Club Name: Club Number:
2. Location of the Project. List the city, country, and (if applicable) the name and address of facility or building where the project has taken place.
3. Rotary Foundation Six Areas of Focus. List the one Area of Focus that best describes the Project.
4. Project Description. Describe the project and the problem or need it addressed (including the intended beneficiaries) and how it has addressed those needs.
5. Start Date: Completion Date:
6. Sustainability and Outcomes. Describe in some detail how we know that the grant was successful in achieving the goals and objectives of the project and how the benefiting community will maintain and/or continue the project after the grant funds have been fully expended.
7. Rotarian Participation. Describe the role and specific non-financial contributions to be made by D5500 Rotarians in planning, implementing, and publicizing the project. Estimate the number of D5500 Rotarians (and their total hours of work) that participated in the project:
8. **Equipment Listing.** The sponsoring Rotary club is required to maintain a list of all equipment purchased with Rotary grant funds and the current ownership and location. A list detailing each piece of equipment, the brand, the model number, the current owner, and the location of the equipment is required in the Final Report. (NOTE: A Rotary club, Rotary district, or Rotarian may not own anything purchased with Rotary grant funds.)
9. **Public Affairs Releases** (Optional but desired). Attach any photographs or public affairs releases used to promote Rotary’s involvement. This might include, but is not limited to, a picture of plaques or signage installed.

Section II. Financial Report. Attach copies of all bank statements, receipts, and checks required to document the collection and total expenditure of Project funds.

1. Income: List all Rotary clubs and other organizations or individuals that have provided funds and the cash amounts of their contributions in order to validate the 50% D5500 match of cash contributions. No D5500 matching credit towards grant funding can come from in-kind contributions, donated labor or services, or from any other non-cash sources.

|  |  |
| --- | --- |
| **Name of Rotary Club or other Source of Income** | **Amount** |
| District Grant funds received from D5500 |  |
| Your Rotary Club Cash Contribution |  |
| Other D5500 Rotary Club Contributions |  |
| Other Cash Contributions (not provided to your Rotary Club) |  |
|  |  |
|  |  |
|  **Total Project Income** |  |

NOTE: If this project was conducted with an overseas partner then copies of bank statements tracking fund transfers are also required.

2. Expenditures. List **all** items purchased with District Grant and Club Project funds to establish the total amount spent on the project. **Provide receipts for all items costing more that $50.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Item Purchased** | **Name of Supplier** | **Amount** | **Location (if other than the project site)** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  | **Total Project Expenditures** |  |  |

NOTE: If a foreign currency is used, give the exchange rate used.

**Competitive Bids and Conflict of interest.** In accordance with “Best Business Practices” clubs are encouraged to use a competitive bidding process when selecting a major suppler. Any purchase in access of $1000 provided by a single source, a Rotarian, a Rotarians’ business, or a family member of a Rotarian must be included in the Final Report with an accompanying explanation that states why the item purchased or service provided was best value and not a conflict of interest. A simple signed statement attesting that “this was the lowest bid”, or “this was the only supplier who could meet our schedule”, or “this was the only supplier in our area” will suffice.

Section III: Club Leadership Signatures

The undersigned Club President and Project Contact affirm (**two signatures required**):

* 1. That all information contained in this Final (Progress) Report Is true and accurate to the best of their knowledge;
	2. That, in accordance with best business practices, a competitive bidding process was used for the purchase of all large items and where only one supplier was used that it was in the best interests of the project and the Rotary club to use the selected source;
	3. That if a major item or service (in excess of $1000) was provided by a Rotarian, a Rotarian’s business, or a family member of a Rotarian, then an explanation was included with this report explaining why the item or service was not a conflict of interest and why it was in the best interests of the project and the Rotary club to use the selected source;
	4. That we have complied, to the best of our knowledge, with the Rotary Foundation’s *Terms and Conditions for Rotary Foundation District and Global Grants* and Rotary District 5500’s *Policy for District Grants*;
	5. That all expenditures made with district grant funds were only for district grant eligible items; and
	6. That all records of the project will be maintained by the Club for a period of five (5) years and that copies of all required records, receipts, checks, and bank statements are attached to this Final Report.

For the Rotary Club of Date:

Club President:

 (Print Name)

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Club Project Contact:

 (Print Name)

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Submit the completed Progress or Final Report (including supporting materials) to the D5500 District Grants Subcommittee Chair: Joe Puett, 2732 Brewer Dr, Sierra Vista, AZ, 85650 or email to jmpuett1@aol.com.