**District Grant Report**

**District 5450 2023-24**

# REPORTING REQUIREMENTS AND DOCUMENTATION

1. Reports that document the implementation of the grant project (including how grant funds were used) must be submitted to the District Grants Committee at a minimum within one year of the grant approval date. For incomplete projects, an interim report is strongly recommended within 6 months of project initiation.
2. If the project is incomplete at the end of the grant approval year (June 30) and was approved before January 1st in the current grant year (i.e. the grant has been active for six or more months), submit an interim report.
3. Submit a final report for all completed projects within the grant approval year. For any project not completed within the grant approval year, a final report must be filed no later than June of following grant year.
4. Grant reports (progress or final) should be submitted to [grants5450@gmail.com](mailto:grants5450@gmail.com).
5. Grant sponsors need to keep copies of all receipts and bank statements related to grant-funded spending.
6. Progress reports must include receipts for expenses shown in the report. The final report MUST include any remaining receipts for expenses paid with Grant Funds and bank statements showing receipt and distribution of those funds
7. If any part of the grant funds was managed by any entity other than the District 5450 sponsor Club, the final report must include bank statements showing all transactions and a letter from the organization stating that all grant funds were spent on items listed in the grant. Receipts from the organization or a detailed summary of expenditures and dates are required.
8. All grant projects and activities funded by district grants need to be completed within 12 months of the grant approval date.
9. If $500 or more of grant funds remain after the projects are completed, the District Grants Committee needs to approve their use for additional project-related expenses or any other appropriate humanitarian project. If the remaining funds are less than $500, the Club may spend this fund on any humanitarian-related activities after notifying the Grants Committee.
10. A club will be ineligible to apply for a new grant if it has an overdue or delinquent grant report.

**Submit report to** grants5450@gmail.com

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Rotary Club: | |  | | |
| Project Title: | |  | | |
| Progress report |  | Final report |  |

**If this is a Progress Report, please provide the estimated project completion date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Project Description (As shown on grant application)**

1. Briefly describe the project. What was done, when, and where did project activities take place? If this is a progress report, what remains to be done?

2. How many people benefited from this project? (Provide your best estimate - not a range.)

3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?

4. Is there a way for this project to be sustainable? How will its impact be maintained?

5. What is your best estimate of how many District 5450 Rotarians (include local Rotarians, if any, for international projects) participated in the project?\_\_\_\_\_. What are the estimated total number of hours that they spent? \_\_\_\_\_.

What did they do? Please give at least two examples, not including financial support provided to the project.

How many non-Rotarians (not affiliated with the participating organization) were involved?\_\_\_\_\_\_

6. In what ways will this be seen as a Rotary project? Include the publicity plan and the signage that identifies this as a Rotary project. If possible, provide photo’s in jpeg format showing signage, volunteer activities, items purchased, etc.

7. Purchasing Procedure. Please describe the process that the Club used to get the best value in purchasing items under the grant. Considerations in addition to price could include location, availability, discounts, proprietary materials and unique requirements of the beneficiary organization.

8. Inventory system. The Rotary Foundation requires that the sponsoring Club create a system to identify goods that were purchased under the grant in the event of a subsequent audit or need for repairs. This would include documentation of serial numbers or the make and model of equipment supplemented by photographs (in jpeg format)

and other means of identification. Please describe the system that is in place.

9. If a cooperating or implementing organization was involved, what was its role?

10. Describe any substantive changes in the scope of the grant. (These must be approved by the District before the project is completed.)

**Required: Attach receipts for all expenses under the grant and bank statements showing the receipt of Grant funds and all Grant payments made out of the account. We cannot accept cancelled checks as proof of payment.**

**If grant funds were not held in a grant-specific account, or if there are many receipts, a ledger is required. Retain originals.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Currency Used: |  | Exchange Rate: |  | = 1 USD |

11. Income

|  |  |  |
| --- | --- | --- |
| **Sources of Income** | **Currency** | **Amount** |
| 1. District Grant funds received from the District (Total DDF) |  |  |
| 2. Club(s) cash contribution(s) (list all Clubs and amounts) |  |  |
| 3. Other funding (specify) |  |  |
| 4. |  |  |
| **Total Project Income** |  |  |

12. Expenditures (please be specific and add lines as needed)

|  |  |  |  |
| --- | --- | --- | --- |
| **Budget Items** | **Name of Supplier** | **Currency** | **Amount** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |
| 5. |  |  |  |
| **Total Project Expenditures** |  |  |  |

**Certifying Signature**

By signing this report, I confirm that to the best of my knowledge these District Grant funds were spent only for eligible items in accordance with Trustee-approved guidelines, and that all of the information contained herein is true and accurate. I also understand that all photographs submitted in connection with this report will become the property of RI and will not be returned. I warrant that I own all rights in the photographs, including copyright, and hereby grant RI and TRF a royalty free irrevocable license to use the photographs now or at any time in the future, throughout the world in any manner it so chooses and in any medium now known or later developed. This includes the right to modify the photograph(s) as necessary in RI’s sole discretion. This also includes, without limitation, use on or in the web sites, magazines, brochures, pamphlets, exhibitions and any other promotional materials of RI and TRF.

|  |  |  |  |
| --- | --- | --- | --- |
| Grant Champion Signature\* |  | Date: |  |
|  |  | | |  |  |
| Print name, Rotary title, and club |  | | |

* **Please include an explanation if the Grant Champion named in the Grant Application does not sign the report. Typed signatures are not acceptable.**