

**Rotary District 5680**

**2021-2022 District Grants**

***REPORT INSTRUCTIONS***

***Background***

Rotary clubs awarded a District Grant, made available to District 5680 through a grant from The Rotary Foundation (TRF), must adhere to all reporting requirements. Grant reporting is a key aspect of grant management, as the required FINAL REPORT informs the district and TRF of the grant-funded project’s successes, challenges, lessons learned or progress (in the case of an INTERIM REPORT; see details below) and provides an accounting of how grant funds were spent. District 5680 must itself also submit a Final Report to The Rotary Foundation as an accounting of the disposition of the total TRF District Grant. This report is informed by the required individual club FINAL REPORTs to the district.

***Final Reports***

A **FINAL REPORT** is required for all District Grant projects upon completion, which is expected to be by October 31, 2022. See the “Submitting Reports” section below for complete details. The FINAL REPORT Form is also attached to this document and should be completed and submitted as instructed as a stand-alone document (i.e. without the other pages of this document). *Note: The FINAL REPORT may be submitted at any point prior to October 31, if the project is completed.*

***Interim Reports***

An **INTERIM REPORT** is required to be submitted (also as a stand-alone document) for grant projects not completed by October 31. When this delayed project situation occurs or is anticipated, the awarded club should contact the District Grant Subcommittee Chair immediately (see contact information on page 2) to discuss the situation that has caused the project delay and, if appropriate, to request a grant project extension (i.e. up to 24 months, the maximum timeline allowed by TRF). If a grant project extension is granted by the District Grant Subcommittee Chair and the club experiencing the project delay submits the resulting required INTERIM REPORT, a FINAL REPORT is also still required when the delayed grant project is ultimately completed.  **If the club is applying for a 2022-2023 District Grant, an Interim Report must be filed by July 31, 2022, even if the project will be completed by the October 31 Final Report deadline.**

***Important Notes***

* **While District Grant projects are expected to be completed and FINAL REPORTs submitted by October 31, all projects MUST be completed within 24 months from receipt of grant funding.** When that is not possible (which should only be a rare situation caused by extenuating circumstances), *the total amount awarded* through the District Grant must be returned by the club to the district, which is then required to return the funds to The Rotary Foundation. When this scenario is anticipated, the awarded club should contact the District Grant Subcommittee Chair immediately (i.e. well before the 24 month deadline) to receive instructions on processing the terminated grant (see contact information at the bottom of this page).
* **The 2021-2022 District Grant project must be completed and the FINAL REPORT on that grant submitted before the club is eligible to receive funding for a 2022-2023 District Grant.** Note that submitting an INTERIM REPORT does not fulfill this requirement. Submitting an INTERIM REPORT will allow a club to submit a Grant Application, but the FINAL REPORT must be submitted by October 31 in order to receive the awarded grant funds for the following year.

***Submitting Reports***

1. **The FINAL REPORT and INTERIM REPORT Forms are required to be submitted** **in electronic format**. Be sure to complete all questions with sufficient information to thoroughly detail the status, challenges and successes of your District Grant project. The forms may be expanded as necessary to accommodate your responses.
2. Don’t forget to obtain the required signatures on the completed report form (see the last page of each form).
3. When submitting your FINAL REPORT, attach scanned copies of receipts for all project expenses funded by the Rotary District Grant; also include an accounting of ALL project expenses on the budget table in section #17 of the FINAL REPORT Form, specifically detailing expenses funded by the District Grant.
4. Send the **electronic copy** of the completed form(s) to Andrea Krauss, D5680 District Grant Subcommittee Chair, Andrea.Krauss@johnofarmer.com.

*Note: Remember to also include scanned copies of receipts for project expenses funded by the District Grant.*

1. Be sure to keep a copy of your FINAL REPORT and INTERIM REPORT (including related receipts) for your club’s records for at least the recommended five (5) years.



**Rotary District 5680**

**2021-2022 District Grants**

***FINAL REPORT FORM***

*Feel free to expand sections as necessary to provide detailed responses to the information requested.*

1. Club Name / Rotary ID #:

2. Club Location (town):

3. Club President (name/email address):

 *In office when grant was requested and as named on grant application.*

4. Key Contact for the grant-funded project (name/email address):

*As named on grant application; if changed, provide both the name used on the grant application and the name of the current Key Contact.*

5. Project budget summary:

 *Provide complete budget data under Item #17 below.*

**District Grant Award $**

**District Grant Award dollars applied to project $**

*If less than the line above, note on line below (\*) and follow instructions provided.*

Match provided by sponsoring Rotary Club $

Project funding from other sources $

**TOTAL PROJECT COST $**

*\*Unused Rotary District Grant funds, if any $*

*Contact the District Grant Subcommittee Chair (see contact information on page 6) for instructions regarding the disposition of*

*any remaining/unused District Grant funds.*

6. Provide a brief but thorough description of your District Grant project:

7. Explain how your club determined the need for this project:

8. Describe how your project was a fit to the mission of Rotary and The Rotary Foundation:

9. Name the primary beneficiaries of your project:

10. Identify your original project goals and if/how they were met:

11. Identify and explain any modifications/unanticipated changes to your approved grant project:

12. Describe the challenges and successes encountered in the implementation of your project:

13. Explain how your project will be sustained/maintained going forward:

14. Identify the members of your Project Committee (specified in the “Coordinating the Project” section of your grant application); also describe the participation of other local Rotarians in executing your project:

15. List any community partners (other than Rotarians) that also participated in your project and their role(s) (e.g. funding, organizing, labor, etc.):

16. Explain how your club met The Rotary Foundation requirement to “include signage on or in conjunction with projects that identifies the role of the grant sponsors [i.e. your club and any other major partners] and The Rotary Foundation in accordance with Rotary’s “[Voice and Visual Identify Guidelines](https://www.rotary.org/myrotary/en/document/tell-rotarys-story-voice-and-visual-identity-guidelines-rotarians):”

17. Using the budget table below (which replicates the one on the grant application), provide an itemized accounting of ALL project expenses related to your District Grant project. Be sure to attach copies of receipts for all products/services purchased (or partially purchased) by District Grant funds, as identified in the right column on the table below (see “Submitting Reports” on page 2 of the introductory REPORT INSTRUCTIONS section of this document):

|  |  |  |
| --- | --- | --- |
| **Products/Services Purchased** | **Cost** | **Portion covered by the District Grant** |
|   | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  | $ | $ |
|  **TOTAL COST**  | **$** | **$** |

*Expand or reduce table as necessary.*

18. List any lessons learned from your project that might benefit your club, the district and, potentially, other clubs going forward:

19. Please provide any suggestions and/or comments you might have regarding TRF’s District Grant program for the District Grant Committee’s consideration:

Thank you for your club’s participation in this opportunity to leverage funding from The Rotary Foundation to support projects that demonstrate your commitment to your community and the mission of The Rotary Foundation.

**Required Signatures:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Current President Current Key Contact, District Grant Project

Printed Name: Printed Name:

Date: Date:

Does your club plan to submit/has it submitted an application for a D5680 2022-2023 District Grant?

❑ Yes ❑ No ❑ Undecided

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**Be sure to carefully review the “REPORT INSTRUCTIONS” section at the beginning of this document before submitting your FINAL REPORT.**

***For questions, contact: Andrea Krauss, District Grant Subcommittee Chair, andrea.krauss@johnofarmer.com***

***For District Grant Committee use only:***

Date received: Date Reviewed:

Reviewer(s):

Questions/Concerns (if any):



**Rotary District 5680**

**2021-2022 District Grants**

***INTERIM REPORT FORM***

*Feel free to expand sections as necessary to provide detailed responses to the information requested.*

This **INTERIM REPORT** is required to be submitted in the event your club’s 2021-2022 District Grant project will not be completed by the following October 31. However, before submitting, please contact the District Grant Subcommittee Chair to explain your situation and request approval for a timeline extension, understanding that The Rotary Foundation (TRF) requires that your project must be completed within 24 months of receipt of grant funding.

*NOTES:*

* *If your 2021-2022 District Grant project has been completed, submit the FINAL REPORT instead.*
* *Even if you receive approval for a timeline extension (i.e. beyond 12 months from funding) and submit an INTERIM REPORT, you must still ultimately submit a FINAL REPORT once your project is completed. The FINAL REPORT must be submitted by October 31 in order to receive grant funds awarded for the 2022-2023 year.*

***ANSWER ALL QUESTIONS BELOW:***

1. Club Name / Rotary ID #:
2. Club Location (town):
3. Club President (name/email address):

*In office when grant was requested and as named on grant application.*

1. Key Contact for the grant-funded project (name/email address):

*As named on grant application; if changed, provide both the name used on the grant application and the name of the current Key Contact.*

1. Project budget summary:

**District Grant Award $**

**District Grant Award dollars applied to project TO DATE $**

Estimated unneeded Rotary District Grant funds, if any $

*Contact the District Grant Subcommittee Chair for details when submitting FINAL REPORT*

Match provided by sponsoring Rotary Club $

Project funding from other sources $

**TOTAL PROJECT COST $**

1. Provide a brief but thorough description of your District Grant project:
2. Detail the progress of your District Grant project to date:
3. List the steps that remain to allow you to complete your District Grant project:
4. Provide your best estimate of when your District Grant project will be completed:
5. Provide the date your club received District Grant funding for your project:
6. Describe the circumstance(s) that will prevent/prevented your District Grant from being completed by October 31 of the year following grant funding:
7. Explain your assurances that your project can be completed within the required 24 months from grant funding:
8. Describe what you have learned that, in hindsight, might have prevented the delay your club has experienced in completing the approved District Grant project:
9. Indicate how/when you requested a District Grant timeline extension (up to a maximum of 24 months from grant funding) and how/when you received approval of the extension:

**Required Signatures:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Current President Current Key Contact, District Grant Project

Printed Name: Printed Name:

Date: Date:

Does your club plan to submit/has it submitted an application for a D5680 2022-2023 District Grant?

❑ Yes ❑ No ❑ Undecided

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**Be sure to carefully review the “REPORT INSTRUCTIONS” section at the beginning of this document before submitting your INTERIM REPORT.**

***For questions, contact: Andrea Krauss, District Grant Subcommittee Chair, andrea.krauss@johnofarmer.com***

***For District Grant Committee use only:***

Date received: Date Reviewed:

Reviewer(s):

Questions/Concerns (if any):