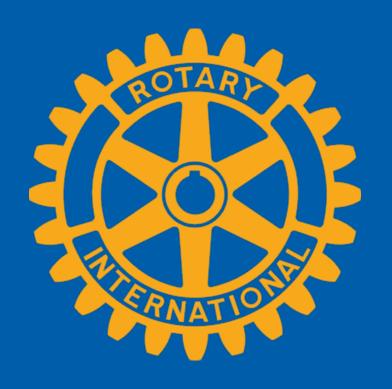
## GLOBAL GRANT MANAGEMENT SEMINAR

DISTRICT 6860

April-May 2018





- Global Grants
- Learn Global Grant requirements
- Learn eligible activities
- Qualify clubs to receive Global Grant funds



#### **Global Grants**

Rotary Foundation Global Grants support larger, international projects with sustainable, measurable, high-impact outcomes in one or more of six areas of focus that correspond to the Foundations' Mission.

Peace & conflict resolution/prevention

Disease prevention/treatment

Water and sanitation

Maternal and child health

Education and basic literacy

Economic and community development



#### The Annual Fund

#### 50%

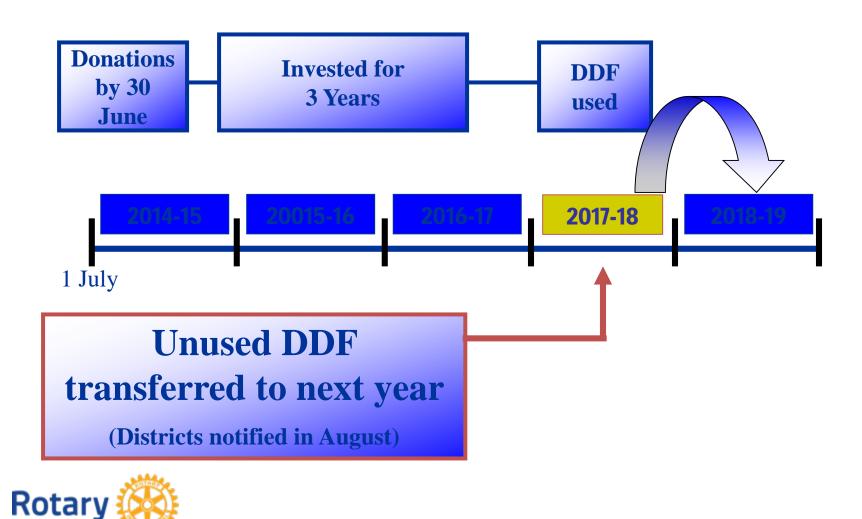
OF CONTRIBUTIONS ARE
INVESTED FOR THREE
YEARS. EARNINGS COVER
ADMINISTRATIVE EXPENSES.
THIS 50% THEN IS
RETURNED TO THE DISTRICT
AS <u>DISTRICT DESIGNATED</u>
FUNDS

#### 50%

OF CONTRIBUTIONS
INVESTED IN THE WORLD
FUND. IT PAYS FOR
MATCHING GRANTS



#### How District Funding Works



## **Project Funding**

#### Raise Funds

- Global grants are a combination of funds raised by sponsor clubs and matching funds from TRF
- TRF matches at least \$15,000 from the World Fund
- Projects are at least \$30,000
  - DDF matched 100%
  - Rotary member cash contributions matched 50%
  - Nonmember cash contributions matched 50%



## Global Grant Requirements – Your Project Must

- Have a long-term sustainable impact
- Include activities that clearly fit into one of Rotary's areas of focus
- Invest at least \$30,000 within a community
- Address an important need identified by the community itself
- Strengthen the community's capacity to meet its own needs.



## Global Grant Requirements – You Must

- Apply for a grant through the Grant Center at Rotary.org using My Rotary
- Actively involve the benefiting community in the project
- Partner with a club in another country
- Qualify your club for global grants every year



## Global Grant Requirements – You Must

- Act as primary sponsor club of no more than 10 active global grants at a time (Limit of 2 in District 6860)
- Develop a project plan that includes a budget and a financial management plan
- Measure progress toward the outcome
- Stay up-to-date in reporting for all active grants



## **Eligible Activities**

Global grants support international activities within Rotary's areas of focus:

- Humanitarian projects
- Vocational training
- Scholarships



#### **Club Qualification**

- Attend a global grant management seminar
- Complete the club Memorandum of Understanding (MOU)
- Agree to any additional qualification requirements set by your district

Complete these steps annually to stay qualified



If you're thinking about applying for a global grant and your club is qualified to do so, be sure that your project meets the criteria for global grants. Global grant activities must be supported by the benefiting community and led by Rotary members, and they must have measurable results and an impact that will continue after the grant funds have been spent.



## Make a Sustainable Impact

- Sustainability
- Your Community's Needs and Strengths



## Make a Sustainable Impact

For Rotary, sustainability means providing longterm solutions to community problems that community members themselves can support after grant funding ends.

- Start with the community
- Encourage local ownership
- Provide training
- Buy local
- Find local funding
- Measure your success



### Make a Sustainable Impact

Do a needs assessment to determine your community's needs and strengths.

- Use the Community Assessment Tools provided by Rotary (links to this and other useful documents on My Rotary and the Grant Center)
- <u>District Grant</u> Funds may be used to conduct assessments
- Once the need is identified, make sure
  - It falls within Rotary's global grant guidelines
  - It is technically feasible
  - You and your partner(s) are qualified to address the need
  - The need isn't already being met my another organization



## Partner To Maximize Impact

- Partnership Requirements
- Sponsor Roles
- Cooperating Organizations



#### Partner To Maximize Impact - Partnership Requirements

To apply for a global grant, two or more Rotary clubs must work together

- The **Host Sponsor Club** is the partner in or near the community that's implementing the project.
- The **International Sponsor Club** works with the host sponsor, but it is located outside the host sponsor's country.



#### Partner To Maximize Impact – Sponsor Roles

#### The Host Sponsor

- Initiates the project
- Conducts a community needs assessment
- Manages project implementation and budget
- Provides local assistance and support to vocational training teams and scholars during their time abroad
- Receives project funds



#### Partner To Maximize Impact – Sponsor Roles

#### The International Sponsor

- Provides financial assistance, technical support, and other guidance
- Performs project tasks that can be done remotely, as well as participating in service during site visits
- Prepares any vocational training teams or scholars for travel and study abroad



#### Partner To Maximize Impact – Sponsor Roles

#### **Both Sponsors**

- Must be qualified to participate in a global grant
- Develop a project plan
- Have project committees that collaborate with each other
- Partner with a cooperating organization (a nongovernmental organization, community group, or government entity) if needed



## **Cooperating Organizations**

- Collaborating with another organization can enhance the quality and effectiveness of your project.
- A Cooperating Organization can provide technical expertise, advocacy, training, education, or other support.
- There must be a Memorandum of Understanding (MOU) with a Cooperating Organization.



## Plan Your Global Grant-Funded Project

- Develop a Project Plan
  - Timeline, roles and responsibilities, areas of expertise, etc.
- Identify Measurable Outcomes
  - Use the Global Grant Monitoring and Evaluation Plan Supplement from the Grant Center
- Create a Financial Plan
  - Bank account, budget, funds dispersal, record keeping
- Raise Funds (as discussed in slide #5)



- Get Started
- Reviews and Approvals
- Grant Ineligibility



#### Get started – DO THIS FIRST

- Discuss your project and funding options with your District Rotary Foundation Committee <u>before you</u> <u>begin your application</u>
- District may be able to provide DDF, other support or expertise
- Online system automatically notifies the District Governor and District Rotary Foundation Chair when you start an application



# In the application, you will provide (see How To Use Grant Center for details)

- The project's objectives
- Its activities
- The project plan and schedule
- Community needs
- Areas of focus
- Cooperating organizations and partners
- Volunteer travel
- Rotarian participation
- The project budget
- Financing



#### Reviews and Approvals

Club and District officers have different levels of access

	View application	Edit application	Authorize application
Primary project contact	•	•	•
Club president	•	•	•*
Club treasurer	•		
District Rotary Foundation chair	•	•	•
District governor	•	•	•**
District stewardship subcommittee chair	•	•	
District grants subcommittee	•	•	
District scholarship  subcommittee chair	•	•	



<sup>\*</sup>Signs legal agreement after application is approved by Rotary

<sup>\*\*</sup>Only if District Designated Funds are used for the grant

## Grant Ineligibility – applications most often denied because:

- The project doesn't fit any of Rotary's areas of focus
- The project isn't sustainable
- The project benefits another organization's programs
- A club partner has reached 10 open grants, the maximum number (2 open global grants for District 6860)
- A club partner is not current on its reporting on other grants



- Project Implementation
- Monitoring and Evaluation
- Financial Transparency
- Reviews, Visits, and Audits



#### **Project Implementation**

- Implement according to your plan
- Communicate any challenges to all parties
- Any changes to your plan must be approved by your Regional Grants Officer
- Regularly review progress with your committee and team
- Regularly check in with partners and the community
- Provide regular updates to your fellow club members
- Report to TRF every twelve months



#### Monitoring and Evaluation

- Monitor the project start to finish
- Consult the <u>Monitoring and Evaluation Supplement</u> for definitions and a sample monitoring plan
- The <u>Scholarships Supplement</u> includes additional recommendations for monitoring global grant scholarships



#### Financial Transparency

- Open a bank account dedicated to only your project
- Follow local laws
- Transfer and disbursement of funds
  - Provide the project bank account's information
  - Name two Rotary members as signatories
  - Sign the global grant legal agreement
  - Submit cash contributions to TRF or deposit directly into the project account



#### Financial Transparency

- Keep financial records
- Retain documents
  - All grant correspondence, including email
  - Beneficiary documentation (assessments, MOUs, etc.)
  - Vendor documentation (quotes, contracts, etc.)
  - Grant-related documentation (agreements, receipts and invoices, bank statements, inventory, photos, etc.)
- Track inventory



#### Reviews, Visits, and Audits

- Technical Review
- Site visits
- Audits

	Technical review	Interim site visit	Advance site visit	Approval by Trustees
\$15,000- \$50,000	(depends on technical difficulty)	2		
\$50,001- \$100,000	•			
\$100,001- \$200,000	•			•



### Report Your Progress and Outcome

#### Reporting Requirements

- Timeline
  - Submit a project report within 12 months of first grant payment and every 12 months thereafter
  - Final reports are due within two months of project completion
  - Due dates and overdue notices are provided in the Grant Center



## Report Your Progress and Outcome

#### Reporting Requirements – Final Report

#### Humanitarian Project Reporting Requirements

- · Purpose of the project
- · Project goals
- Evaluation of goals and how they addressed the areas of focus
- Results of your monitoring and evaluation plan and who collected the measurements
- Description of how sponsors were involved in the grant
- Number of project beneficiaries and how they benefited
- Itemization of how the funds were spent, including identity of vendors
- Role of cooperating organizations, if any
- Bank statement indicating that the account is closed (if it is a projectspecific account) or that all grant funds and interest were spent

#### Additional Reporting Submitted by Scholar •

- List of coursework, research, and service activities you completed
- Description of the impact the studies had on your future professional goals
- Description of your interaction with local Rotarians and community

#### Additional Reporting Submitted by Vocational Training Team Leader

- Method, schedule, beneficiaries, and results of the vocational training
- Statement on whether the vocational training met your and beneficiaries' expectations
- Description of your specific role on the vocational training team and the activities carried out during training



## Get Extra Support

- District Rotary Foundation Committee
- Regional Rotary Foundation Coordinator
- Regional grants officers
- Area of focus managers
- Cadre of Technical Advisers
- Rotary Support Center
- Rotary Grants discussion group
- Rotary Ideas
- Rotary Showcase



Up next
Part 2
HOW TO USE GRANT
CENTER



### HOW TO USE GRANT CENTER

DISTRICT 6860

April-May 2018





#### **Purpose**

To learn about The Grant Center — the place to go for everything you need to do online for your Rotary Foundation grants, and to keep all of Rotary's grant-related resources handy for you.



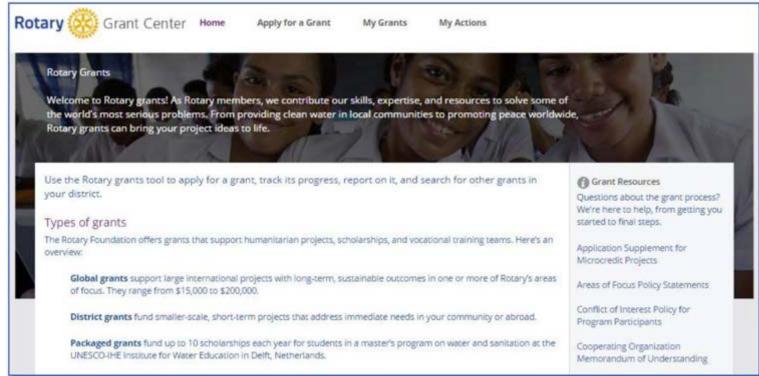
### Agenda

- Navigate the Grant Center
- Apply for a Global Grant
- Authorize a Global Grant Application (Club Presidents and District Leaders)
- Enter Global Grant Bank Account Information
- Report on a Global Grant
- Authorize a Global Grant Report



#### Navigate the Grant Center

# The landing page gives an overview of Rotary grants and links to helpful resources



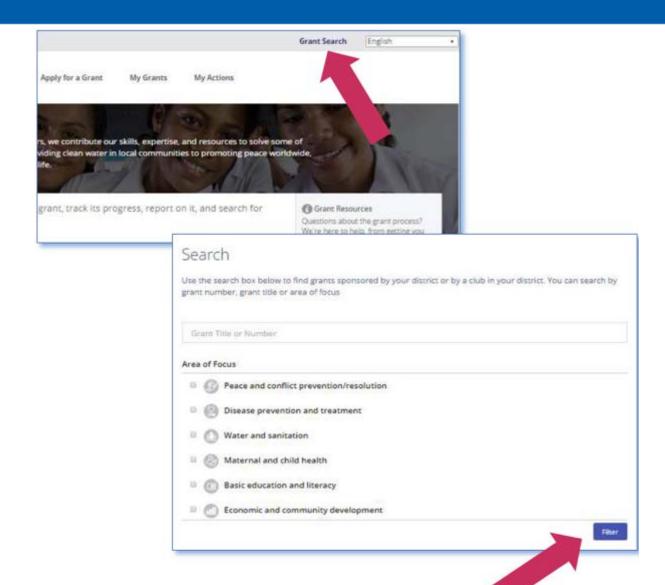


#### Navigate the Grant Center

Use **Grant Search** to find all of the global and district grants sponsored by your district, whether or not your club is involved. You can search for grants by number, title, or area of focus. After entering search criteria, use the **Filter** button.



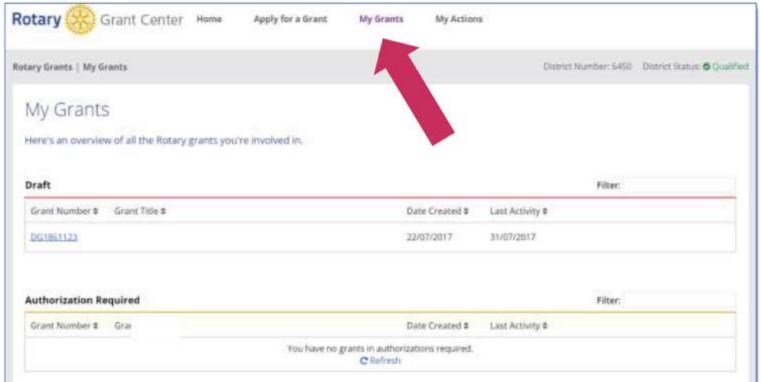
#### Navigate the Grant Center - Grant Search





#### Navigate the Grant Center – My Grants

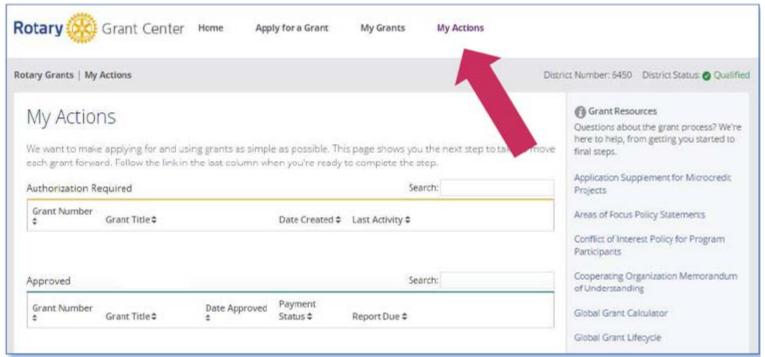
Choose **My Grants** to see all of the grants you're involved in.





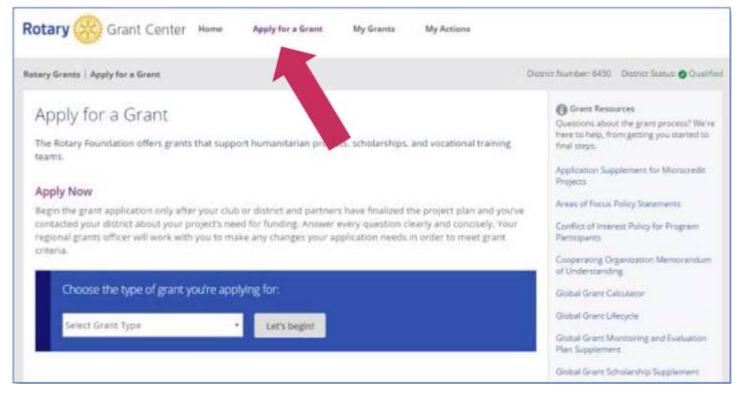
#### Navigate the Grant Center – My Actions

# Go to **My Actions** to see the grants you're involved in that require action from you.





## To start a global grant application, go to **Apply for a Grant**.





# Choose **Global Grant** from the list and click **Let's begin!**

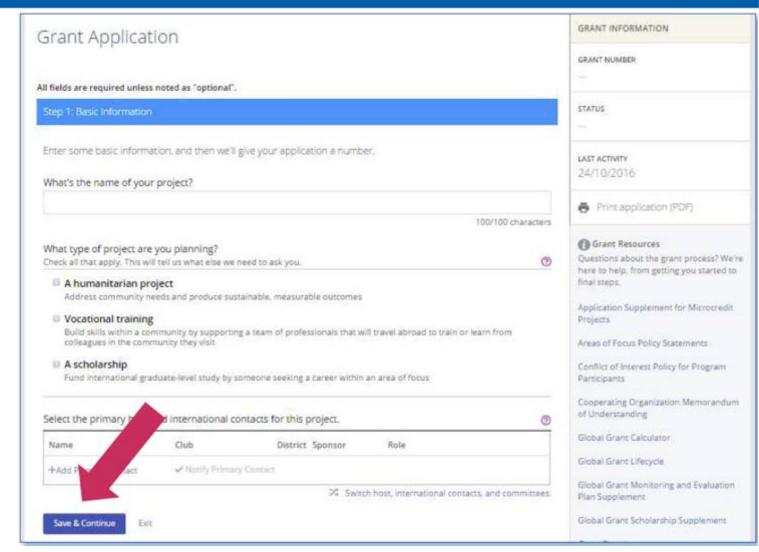
Apply Now	Training Plan for Global Grants  Vocational Training Feam Itinerary
Begin the grant application only after your club or district and partners have littled the project plan and you've contacted your district about your project's need for funding. Answer of the section clearly and concisely. Your regional grants officer will work with you to make any changes your and concised in order to meet grant criteria.	Vocational Training Team Member Application
Choose the type of grant you're applying for:  Select Grant Type  • Let's begin	
Select Grant Type • Let's begint	



In **Step 1**: **Basic Information** enter project name, project type, primary host and international contacts. Click on the question mark (?) icons throughout the application for important information. Use the **Save & Continue** button to move to the next step.

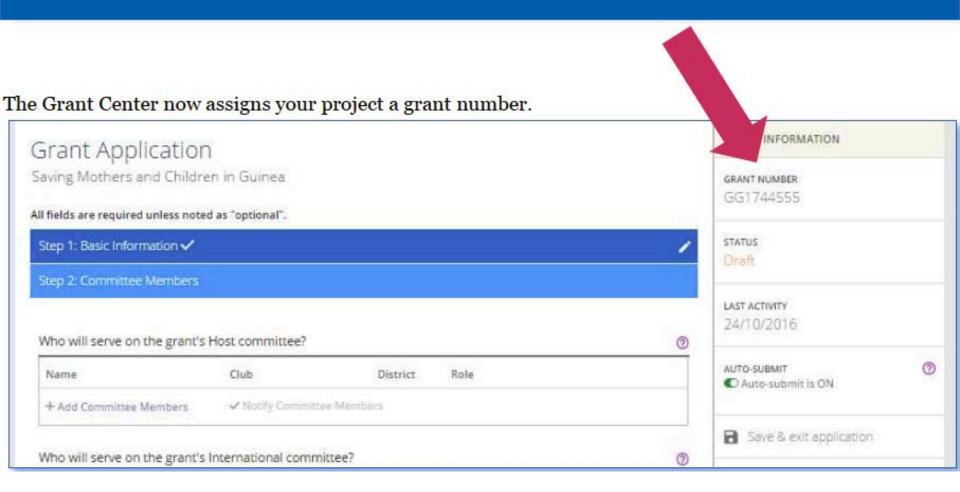


#### Apply for a Global Grant – Step 1





#### Apply for a Global Grant – Step 1





Now you're at **Step 2**, **Committee Members**.

Add at least two members of the host committee, made up of Rotarians who live in the country where the project activities will be carried out (or where the scholar will study, in the case of a scholarship), and at least two members of the international committee. Answer the question about conflicts of interest. After each step, you'll use the **Save & Continue** button to move to the next step.

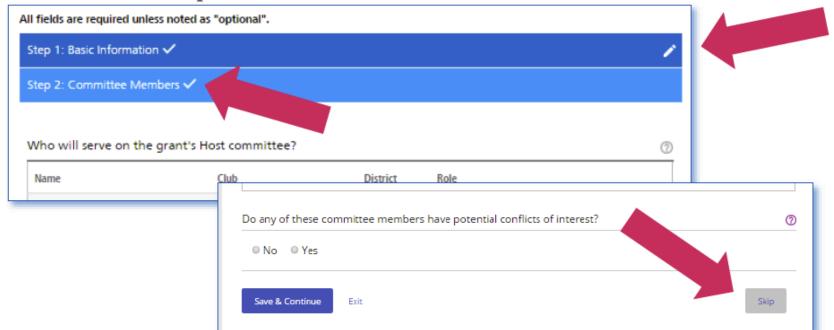


### Apply for a Global Grant – Step 2

Grant Application	n		GRANT INFORMATION
aving Mothers and Child			GRANT NUMBER
I fields are required unless no	oted as "optional".		GG1744555
Step 1: Basic Information 🗸			STATUS
Step 2: Committee Mem			Draft
			LAST ACTIVITY
Who will serve a grant	t's Host committee?		24/10/2016
Name	Club	District Role	AUTO-SUBMIT  Auto-submit is ON
+ Add Committee Members	✓ Notify Commi	House Malaterbases	Auto-submit is ON
1 And Committee memora	* Houry Carrie	WC 1801-0	Save & exit application
Who will serve on the gran	t's International com	mittee?	0
Name	Club	District Role	Print application (PDF)
+ Add Committee Members	✓ Notify Commi	ttee Members	■ Delete application
Do any of these committee	members have note	ential conflicts of interest?	Grant Resources
◎ No ◎ Yes			Questions about the grant process? We'r here to help, from getting you started to final steps.
100			- Interest (Interest (Inte
			Application Supplement for Microcredit
Save & Continue Ext		(54)	Projects



As you complete the steps, you'll notice that **check marks** appear next to their labels. You can click the **pencil** to edit steps you've completed. You can also Skip a step and return to it later, but any changes you've made within that step will not be saved.



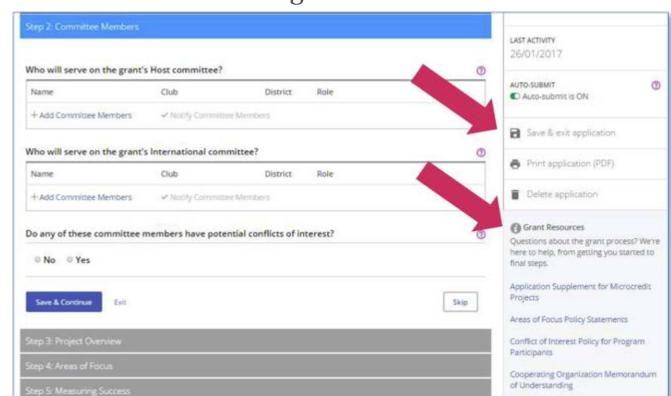


If you save a step when you haven't supplied all of the necessary information, a banner will tell you that more information is needed. The incomplete sections will be highlighted. The banner will remain until all information for the step has been provided.

Where will your project ta	ke place?	
City or town	EN. (1). (1)	Province or state (optional)
Country		
Please Select	•	
	▼ ke place?	
Please Select When will your project tal Start date	ke place?	



Throughout the process, you can click **Save & exit application**. You can also create a PDF of the grant application at any time using Print application (PDF), or you can delete an application that is still in "Draft" status by clicking on **Delete application**. Helpful Grant Resources are listed at the bottom of the right-hand column.



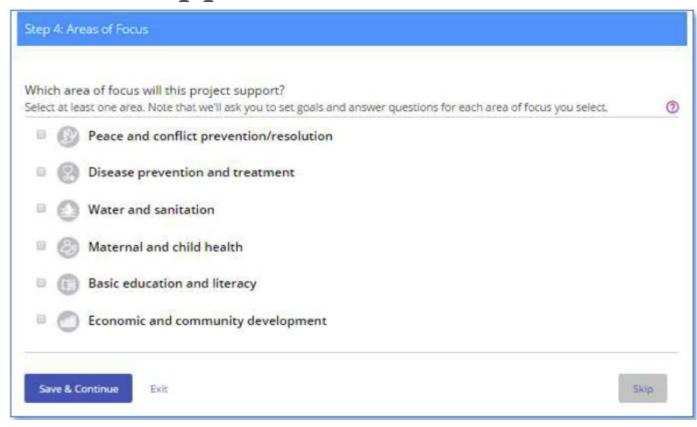


## In **Step 3**, briefly describe your project in a Project Overview

ell us a little about yo	ur project. What are the main objectives of the project, and who will benefit from it?	0



In **Step 4**, indicate the **Areas of Focus** that your project will support.

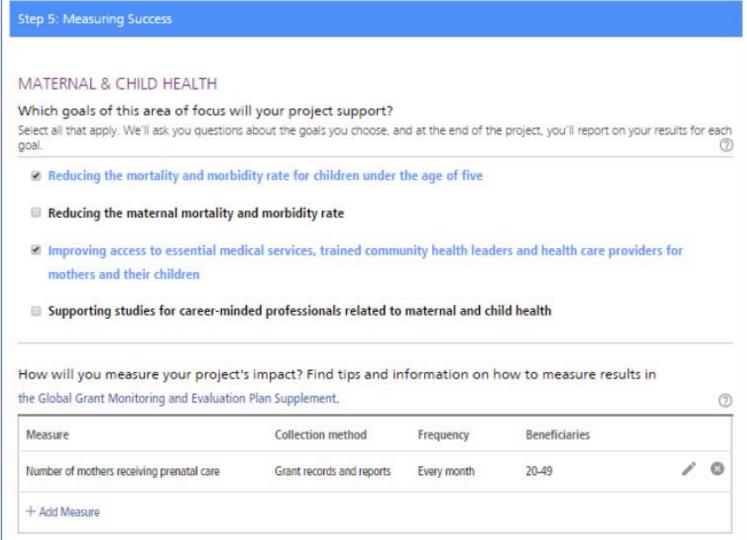




In **Step 5**, outline your plan for **Measuring Success** by checking one or more goals for each area of focus and adding measures for each goal.



#### Apply for a Global Grant – Step 5





In **Step 6**, add the **Location and Dates** of the project. For scholarships and vocational training teams, add the estimated travel dates.

Step 6: Location and Dates

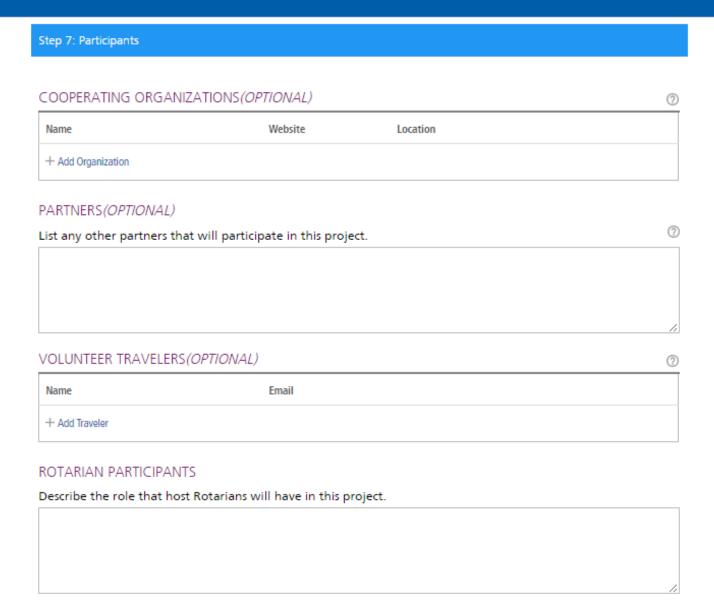
HUMANITARIAN PR	ROJECT	Г		
Where will your project	t take p	place?		
City or town				Province or state
Conakry				
Country				
Guinea			*	
When will your project	t take p	lace?		
Start date		End date		
02/01/2017	Ё	29/12/2017	Ё	



In **Step 7**, list other project **Participants**, including cooperating organizations, scholarship candidates, vocational training team leaders, additional partners, volunteer travelers, and participating clubs or districts.

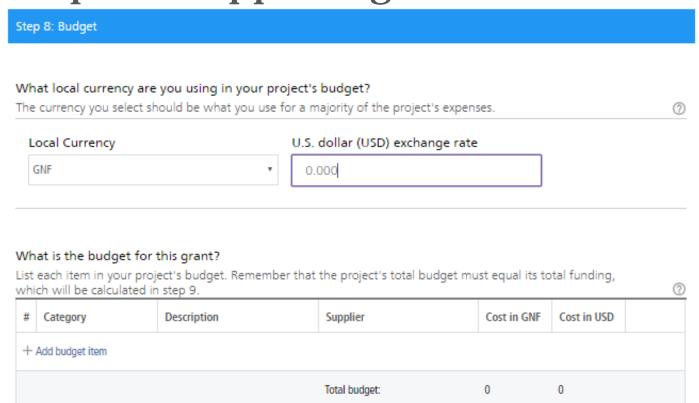


#### Apply for a Global Grant – Step 7





In **Step 8**, provide **Budget** data. Enter the local currency and exchange rate, list budget items, and upload supporting documents.





## In **Step 9**, list your sources of project **Funding**.

You may request up to 0.00 USD from the World

Tell us about the funding you've secured for your project. We'll use the information you enter here to calculate your maximum possible funding match from the World Fund.

# Source Details Amount (USD) Support\* Total

+ Add funding source

\*Whenever cash is contributed to the Foundation to help fund a global grant project, an additional 5 percent is applied to help cover the cost of processing these funds. Clubs and districts can receive Paul Harris Fellow recognition points for the additional expense.

How much World Fund money would you like to use on this project?



Funding summary

Fund.

(?

In **Step 10**, **Sustainability**, you explain each step of the project, how the project responds to community needs, and what makes the project activities sustainable. You also answer a few questions about how the budget affects the sustainability of the project.



### Apply for a Global Grant – Step 10

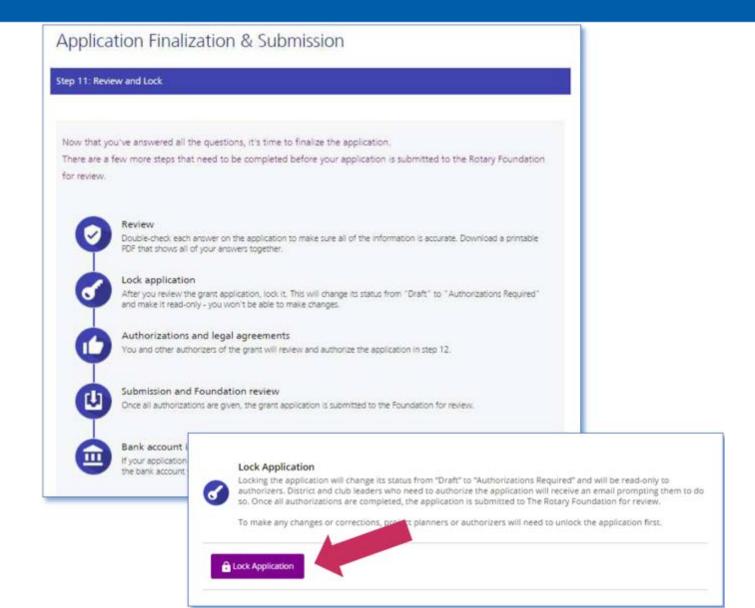
HUMANITAR	Volume - No in the second second second	
	Project implem	entation
Project plan	Summarize ea	BUDGET
Describe the	# Activity	Will you purchase budget items from local vendors?
	+ Add Activity	© Yes □ No
	Describe how	Did you use competitive bidding to select vendors?
How did yo		⊕ Yes   ⊕ No
		Do your budget items align with the local community's technology standards?
	Does your pro	© Yes © No
fow were r	⊕ Yes ⊕ N	
	Will the project	Describe how community members will maintain the equipment after grant-funded activities conclude. Will replacement parts be available?
	○ Yes ○ N	
fow were c		
	How were the	
		After the project is completed, who will own the items purchased by grant funds? No items may be owned by Rotary club or member.



When you've completed steps 1-10, you're ready to finalize and submit your application. In **Step 11** you **Review** and **Lock** your application. Make sure all of your information is accurate and complete. You may find it helpful to print the full application. After you review the grant application, lock it. This will change its status from "Draft" to "Authorizations **Required**" and make it read-only — you won't be able to make changes. Only the primary contact can lock the application.



#### Apply for a Global Grant – Step 11





### Authorize a Global Grant Application (Club Presidents and District Leaders)

In **Step 12**, **Authorizations**, the primary contacts and district and club leaders will authorize the application. Review the information, then click **Authorize now**. As soon as everyone who needs to authorize the application does so, the application is submitted to The Rotary Foundation for review. After your application is submitted, you cannot change it without contacting Rotary staff.



### Authorize a Global Grant Application – Step 12

#### Step 12: Authorizations

#### YOUR AUTHORIZATIONS & LEGAL AGREEMENTS

#### Authorization

Getting your grant application authorized is the last step before submitting it to The Rotary Foundation. Review the information that has been entered in each step and then give your authorization below. Depending on your role, you may need to authorize the application more than once.

When you locked the application in step 11, an email was sent to club or district leaders who also need to authorize your application. In this step, you can see which of them have done so.

#### Primary contact authorizations

Application Authorization

By submitting this all grant application, we agree to the following:

- 1. All information of the led in this application is, to the best of our knowledge, true and accurate, and we intend to implement the accurate as presented in this application.
- 2. The club/distress to undertake these activities as a club/district.
- We will ensign the cash contributions (as detailed in the grant financing) will be forwarded to The Rotary Foundation.
   (TRF) or sen to the global grant bank account after Trustee approval of the grant.



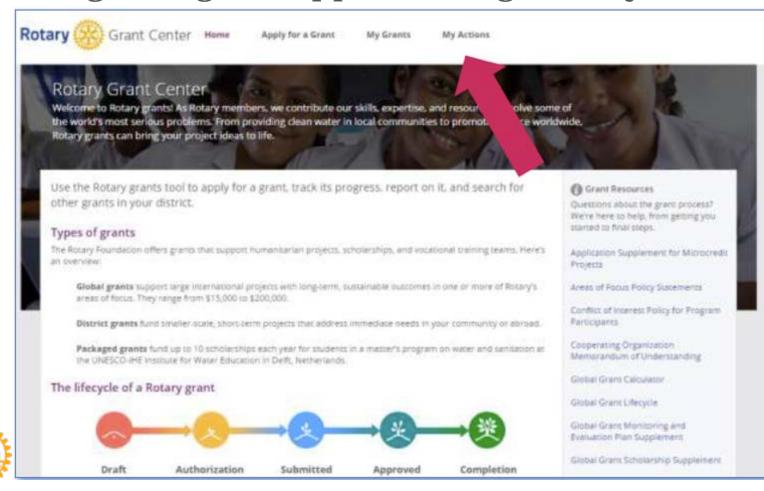


### Authorize a Global Grant Application (Club Presidents and District Leaders)

To authorize a global grant application, go to My

Actions.

Rotary

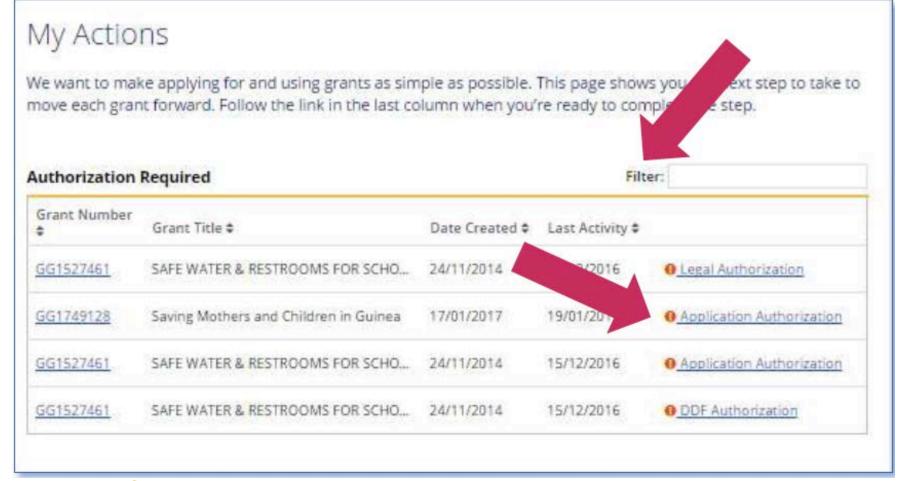


### Authorize a Global Grant Application (Club Presidents and District Leaders)

Go to the **Authorization Required** section of the page. You can use **Filter** to search for a grant by number. Depending on your role (club president, district Rotary Foundation committee chair, or district governor), you'll see various authorization links. When you find the grant you need to authorize, follow its authorization link.



# Authorize a Global Grant Application (Club Presidents and District Leaders)



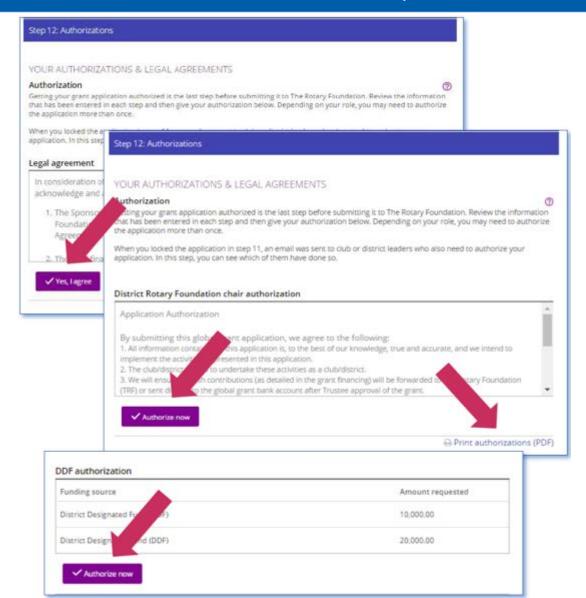


# Authorize a Global Grant Application (Club Presidents and District Leaders)

You'll be taken to **Step 12** of the application, **Authorizations**. Read the legal agreement, then click Yes, I agree, or read the authorization information and click **Authorize now**. You can print a copy of the agreement for your records.

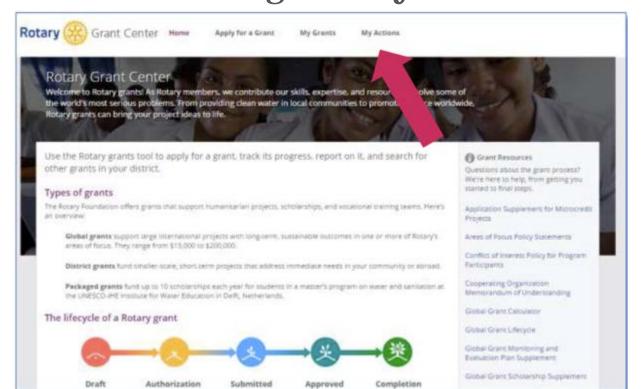


# Authorize a Global Grant Application (Club Presidents and District Leaders)



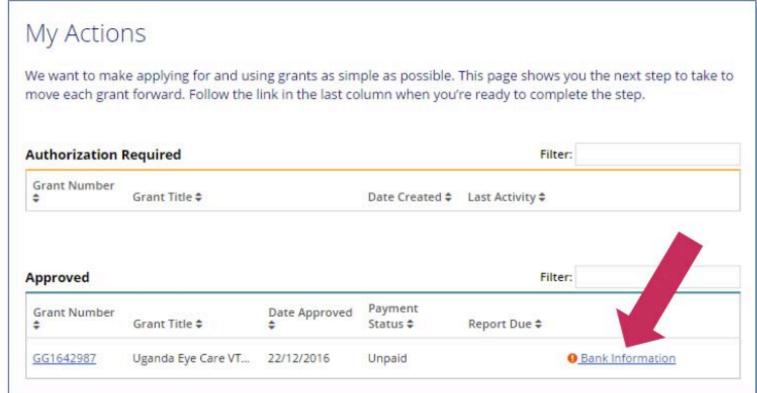


After a grant has been approved, primary contacts provide information about the project bank account so that the Foundation can deposit the grant money. To enter bank account information, go to **My Actions**.





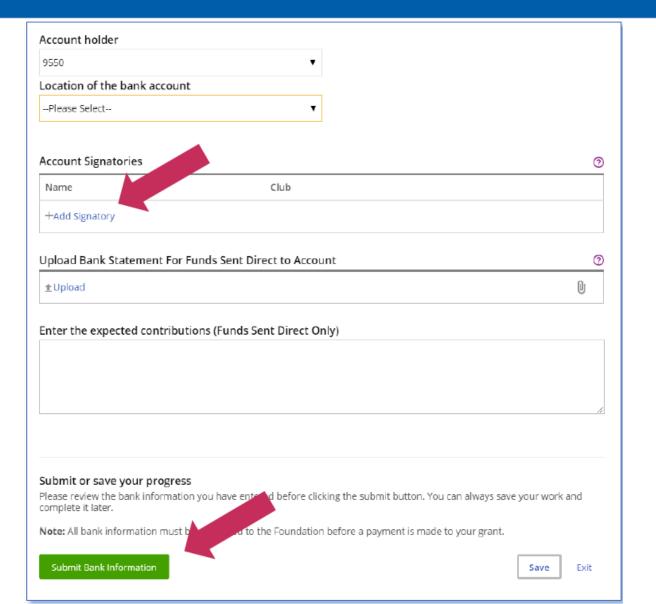
Go to the **Approved grants**. You can use **Filter** to search for a grant by number. When you find the grant, click **Bank Information**.





Select the account holder from the list and then select the location of the bank account. Click **Add Signatory** to designate two Rotarians to serve as signatories for the bank account. When you've provided all of the information, click **Submit Bank Information**.

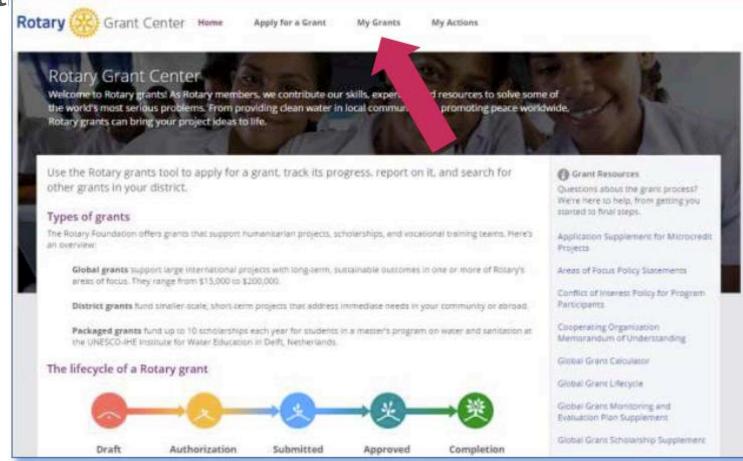






To report on a global grant, go to My

Grants



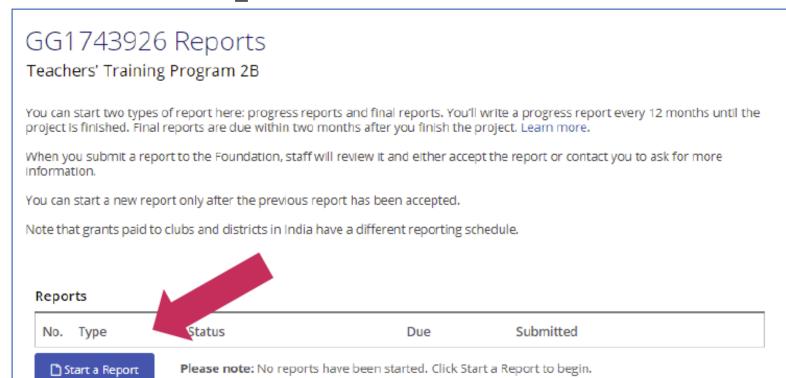


Go to the **Approved grants** section to see all of the approved grants that you're involved in. Or use **Filter** to search for a grant by number. When you find the grant, click **Reports**.

Approved			Filter:		
Grant Number	Grant Title \$	Date Approved \$	Status ¢	Report Due \$	
GG1416944	Eldo Eye Centre Clinic	26/03/2015	Paid	28/05/2016	Reports
GG1419525	T,A.R.A Tenwek Medical Proj	06/04/2016	Paid	11/05/2017	Reports
GG1641361	Cervical Cancer Prevention an	30/09/2016	Paid	24/10/2017	Reports



#### Click Start a Report





# If you have already started a report, choose **Edit** to continue your work on it.



Teachers' Training Program 2B

You can start two types of report here: progress reports and final reports. You'll write a progress report every 12 months until the project is finished. Final reports are due within two months after you finish the project. Learn more.

When you submit a report to the Foundation, staff will review it and either accept the report or contact you to ask for more information.

You can start a new report only after the previous report has been accepted.

Note that grants paid to clubs and districts in India have a different reporting schedule.

# Reports No. Type Status Due Submitted 1 Progress Draft 28/06/2018 Edit | Print



Please note: You can only work on one active report at a time.

Choose **Progress Report** if the project is still in progress. Choose **Final Report** when all project activities are finished. Click **Continue**.

Select Report Type

To begin, select the report type.



PROGRESS REPORT

Use a progress report if the project is still in progress.



FINAL REPORT

Submit a final report when all project activities are finished



Continue

Continue

Select **Change Report Type** if you need to change the report from a progress to a final report, or vice versa.

GG1743926 Reports

Teachers' Training Program 2B



This is a progress report, which indicates that your project activities are still in progress.

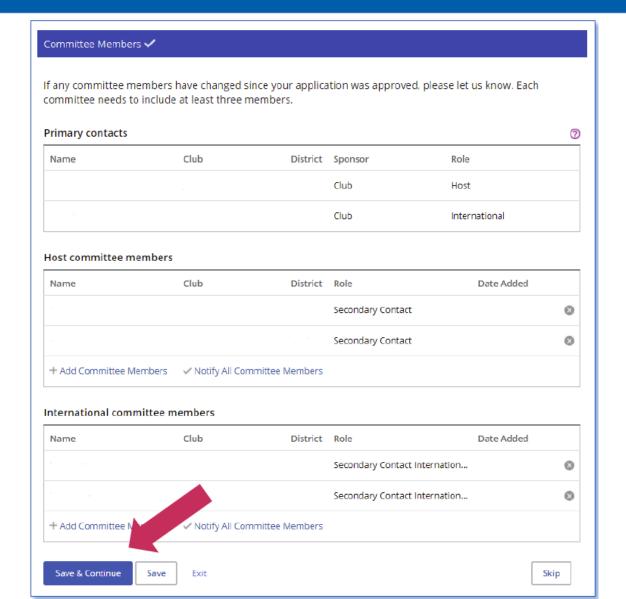
If your activities are completed, switch to a final report. / Change Report Type



Several sections of the report will automatically include information that was provided in the grant application.

Committee Members. If any committee members no longer serve on the project committees, remove them by clicking on the **X** to the right of their information. You can add new committee members if necessary. Use the **Save & Continue** button to move to the next section.







# In **Project Objectives and Implementation** section, include information about the progress made on the project.

Project Objectives and Implementation

Tell us about the progress you and your partners have made on your grant project.

PROJECT OBJECTIVES

The Rotary Foundation approved global grant funding to be used for the following project objectives:

The main objective is to enhance teaching competence of Elementary School Teachers, specifically in mathematics and science. Why elementary teachers? Learning something early on when we are still fresh has a better chance to succeed. Hence, elementary school years are the golden time for children to learn especially something basic such as math and natural science. It is expected that once they master those

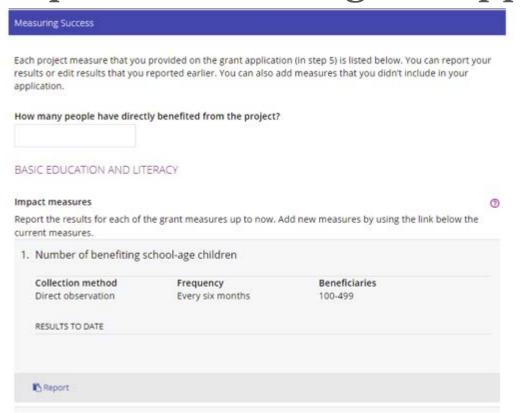
Have any of these objectives changed?



○ Yes ○ No

Have you made progress toward your project objectives?

In **Measuring Success**, add information about the success of the project in terms of the measures you provided in the grant application.





In the **Participants** section, describe how the sponsor Rotarians have participated in the project. Also enter any other clubs or districts that have helped with the project. If any cooperating organizations are involved in the project, provide details about their activities.



rticipants	
PONSOR PARTICIPATION	
hat roles and responsibilities did host sponsor members have?	
hat roles and responsibilities did international sponsor members have?	
	<i>[i</i>

#### PARTNERS (OPTIONAL)

Add any Rotary clubs or districts that were involved in this project, other than the host and international sponsors or financial contributors.



No. Type Club name or district number

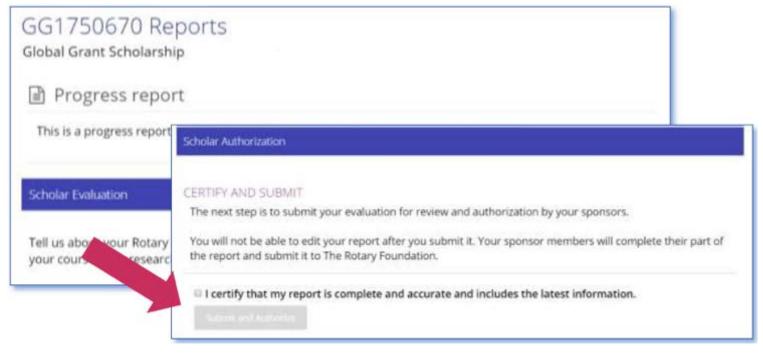
+ Add a Club or District

If your grant involves a scholarship, provide information about the scholar in the **Participants** section of the report.

SCHOLAR	
Tell us a little about the scholar's involvement with Rotary.	
■ Ask the scholar to write the evaluation	
Rate the scholar's level of participation in Rotary activities. The scholar won't be able to see	this rating
Rate the scholar s level of participation in Rotary activities. The scholar work to be able to see	tins rating.
© Poor	
O Fair	
@ Good	
© very good	
© Excellent	
Mark the Rotary activities the scholar participated in during their studies.	
(i) Club meetings	
Conferences (e.g., district conferences)	
Service projects	
☐ Fundraising events	
None	
Other (please specify)	



The scholar will complete and authorize the **Scholar Evaluation**.

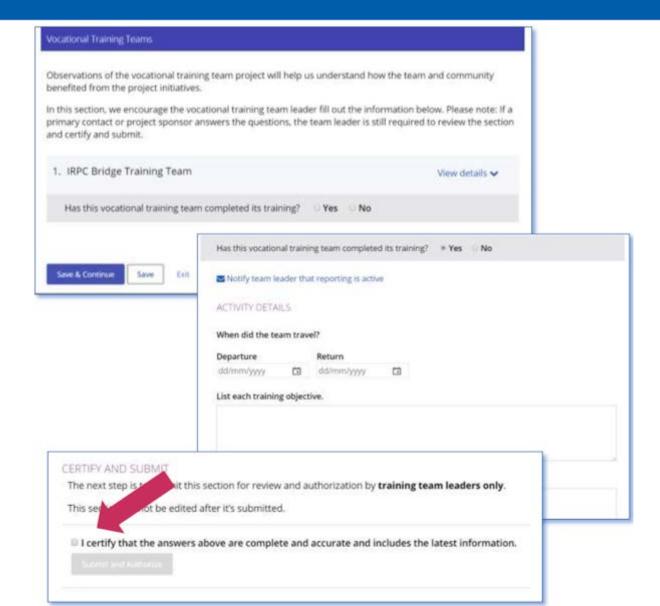




If your project includes a vocational training team, the **Vocational Training Teams** section of the report will be visible.

The vocational training team leader should complete this section. If the team has traveled, select **Yes**, and more questions will be displayed. The team leader will answer these questions and authorize the section. If multiple teams are involved in the grant, the leader of each team will need to complete and authorize their team's section of the report.

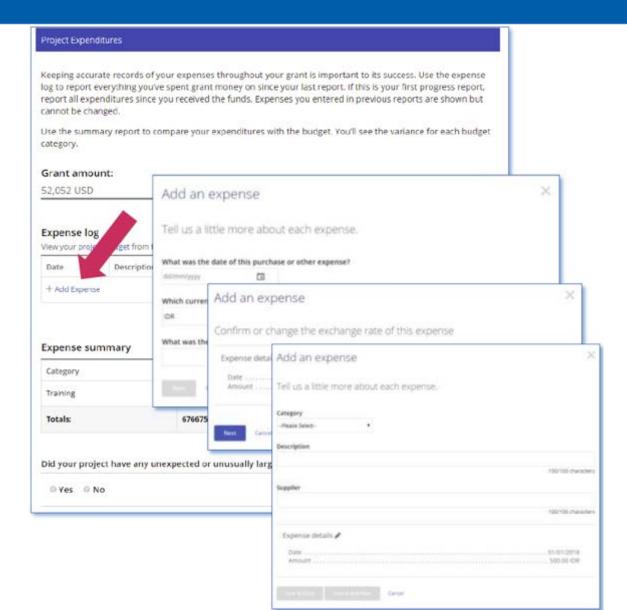






In the **Project Expenditures** section, enter what you've actually spent in the **Expense log** by clicking **Add Expense**. You can view the budget that was included in the grant application by clicking **View** your project budget from the application.







In the **Financial Details** section, you'll answer questions about the project's budget, financial management, and challenges. For both progress reports and final reports, provide bank statements. You may also upload any other supporting documentation, such as a ledger or receipts.



#### Financial Details

#### PROJECT BANK STATEMENTS

Upload bank statements from the project bank account to show all project-related transactions, including deposits and withdrawals. In addition to the bank statements, you can also upload a financial ledger. For scholarships, please attach receipts for any expenses over \$75.

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#### FINANCIAL MANAGEMENT

Who is in charge of the project's financial management?

Please describe the project's financial management, including record keeping, inventory, payment authorizations, and conversion of funds.



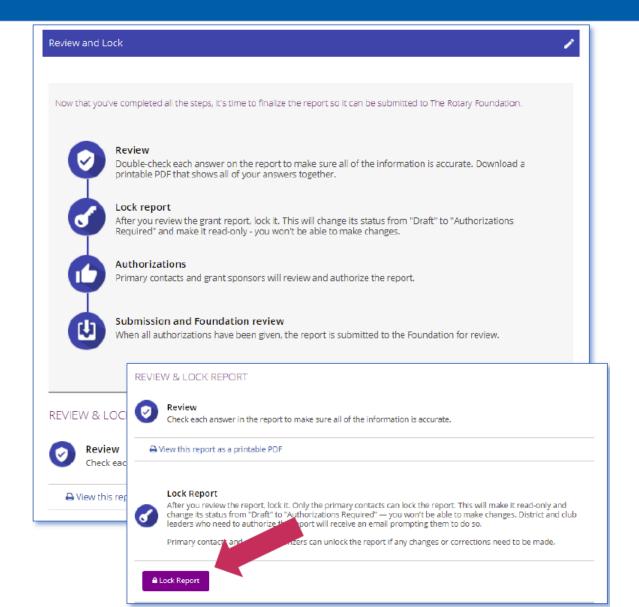
Were there any challenges in managing the project funds?



When you've completed the sections above, you're ready to finalize and submit your report.

In the next section, you **Review** and **Lock** your report. Check each answer you've given to make sure all of the information is accurate and complete. You may find it helpful to print the full report. After you review the grant report, lock it. This will change its status from "**Draft**" to "**Authorizations Required**" and make it read-only — you won't be able to make changes. Only the primary contacts can lock the report.







The last section is **Authorizations**.

The primary contacts and club president (if the grant is club-sponsored) or district Rotary Foundation committee chair (if it is district-sponsored) will authorize the report. Review the authorization information, then click **Authorize now**. As soon as everyone who needs to authorize the report does so, the report is submitted to The Rotary Foundation for review. After your report is submitted, you cannot change it without contacting Rotary staff.



#### Authorizations

#### YOUR AUTHORIZATIONS

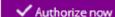
#### Authorization

Getting your grant report authorized is the last step before submitting it to The Rotary Foundation. Review the information that has been entered in each step and then give your authorization below. Depending on your role, you may need to authorize the report more than once.

When the report was locked, an email was sent to club or district leaders who also need to authorize this report. In this step, you can see which of them have done so.

#### Sponsor

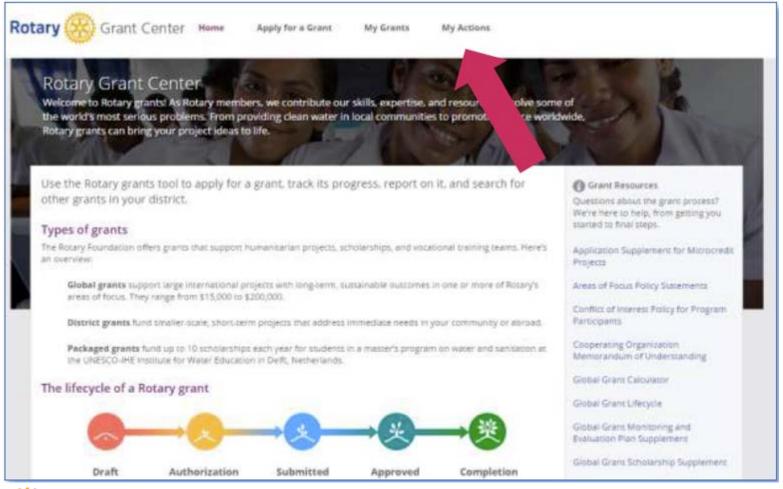
By authorizing this report, I confirm that, to the best of my knowledge, these grant funds were spent according to Foundation guidelines and that all of the information contained in this report is true and accurate. Original receipts for all expenses incurred will be kept on file for at least five years, or longer if required by local law, in case they are needed for auditing purposes. I also understand that all photographs, video and other media submitted with this report will become the property of Rotary International and will not be returns the represent and warrant that I own all rights in the photographs, video and other media, including appearing in the photographs, video and other media to Rotary.





After a primary contact affirms that the report is complete and the report's status changes to "Authorizations Required," the other primary contact and the club presidents or district Rotary Foundation committee chairs from both the host and international sponsors must authorize the report. To authorize a global grant report, go to My Actions.







Go to the **Approved grants** section of the page. When you find the grant, click **Report Authorization**. Then click **Open**.

Approved			Filter:		
Grant Number	Grant Title \$	Date Approved	Payment Status \$	Report Due \$	
GG1633520	Ethiopia VTT Vocatio	29/09/2015	Paid	10/12/2016	<ul> <li>Report Authorization</li> </ul>



Review the report content, then go to the **Authorizations** section of the report. Review the authorization information, and click **Authorize now**. When the final authorizer completes this step, the report's status changes to "Submitted," and Rotary staff will see that the report

Authorizations

is ready for review.





# What Happens Next?

Once the Final Report is accepted by Rotary Foundation staff, your grant status changes from **Submitted** to **Closed** in **My Grants**.



#### Resources

The following documents are on the District 6860 website at <a href="http://rotary6860.org/foundation.php">http://rotary6860.org/foundation.php</a>.

- This slide show, 2018 Global Grant Management Seminar.pdf
- A Guide To Global Grants.pdf
- 2018 How To Use Grant Center.pdf

#### **Additionally**

- Other documents referenced herein are on both My Rotary and the Grant Center.
- My Rotary is at https://www.rotary.org/myrotary/en. Click on Take Action> Apply For Grants> Global Grants.
- The Grant Center is also at My Rotary. Click on Take Action>
   Apply For Grants> Grant Center.



Thank you! GO NOW AND DO GOOD IN THE WORLD!

