



2024-2025
Grants Management Seminar

District 7670
March 2, 2024

Stewardship

Careful and Responsible Management of Rotary International
Grant Funds

Foundation Stewardship Committee

Nancy Brooks, Chair

Judy Domer

Mary Selzer



Stewardship

What does this mean for District Grants?

- **Complete project according to approved application**
- **Gather documentation**
- **Complete final report and upload supporting documentation**
- **Review, sign, and submit the final report for audit**



Stewardship District Grant Application Specifications

Project timelines:

- **July 20, 2023 – Project beginning date**
- **May 1, 2024 – Project completion date**
- **May 15, 2024 – Final Report completion date**



Stewardship District Grant Application Specifications

Evidence of project completion:

- **Legible** scanned copies of brochures, newspaper articles, etc
- Two good quality photos capturing Rotarian involvement and a **legible** Rotary Mark



Stewardship District Grant Application Specifications

Adequate financial documentation:

- Evidence of receipt of project contributions from Club members and other Clubs or organizations such as **legible** scanned copies of checks or bank/PayPal statements showing deposits
- **Legible** scanned copies of receipts or paid invoices for purchases
- Spreadsheet summarizing expenses



Stewardship District Grant Application Specifications

Adequate financial documentation (contd):

- **Legible** bank records:
 - Statement from a bank website showing copy of canceled/cashed check
 - An electronic fund transfer receipt
 - A scanned image of both sides of a canceled/cashed check
 - A credit card statement



Stewardship District Grant Final Report

1. Describe the project (prefilled in Interim Report tab).
2. How many people benefited from the project?
3. Provide measurable goals (prefilled in Interim Report tab) .
4. How many Rotarians participated?
5. What did they do?
6. If a cooperating organization was involved, what was its role?

Obtain club signatures and **submit** for District approval.



Stewardship

District Grant Audit Process

- **Verify that the project was completed according to the application and confirm that TRF Terms and Conditions were met**
- **Confirm grant funds spent according to approved budget**
- **Email Club grant contacts with any questions**
- **Complete and upload audit checklist and give District approval**
- **Submit project to District Foundation Treasurer for reimbursement**



Stewardship

Global Grants Orientation Process

- **Application/Budget**
- **Rotary Grants Terms & Conditions (Restrictions, Travel Policies, Reporting Requirements)**
- **Guide to Global Grants**
- **Global Grant Scholarship Supplement (Eligible and Ineligible Items, Reporting)**
- **How to Use the Grant Center (Report on a Global Grant)**
- **Global Grant Report Template (Project Expenditures & Financial Details)**

Excel Spreadsheet for Tracking Budgeted Expenses



Stewardship Remember!

- **Project activities may not begin and expenses may not be incurred prior to approval by Rotary International and the District**
- **Changes to your approved grant activities or budget must be approved before you implement a change in order to be reimbursed**
- **Confirm that documents uploaded to either DACdb or the Rotary.org website are **LEGIBLE****
- **Obtain all necessary signatures and **SUBMIT** for District approval**



Stewardship Questions?



Nancy Brooks, Chair
nancybrooks@charter.net
828-252-7441 (home) or
828-734-9403 (mobile)

