GRANTS MANAGEMENT SEMINAR

Grants Stewardship

Nancy Brooks
Foundation Stewardship Chair

Nancy Brooks, Chair

Billi Black

Judy Domer

Stewardship

Careful and Responsible Management of Rotary International Grant Funds

Rotary

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**

Rotary

STEWARDSHIP
District Grants Application Specifications

Project timelines:

- **August 2, 2022 – Project beginning date (approx.)**

- **May 1, 2023 – Project completion date**

- **May 15, 2023 – Final Report completion date**

Evidence of project completion:

- **Legible scanned copies of brochures, newspaper articles, etc**

- **Two good quality photos capturing Rotarian involvement and the Rotary Mark**

Adequate financial documentation:

- **Evidence of receipt of project contributions from Club members and other Clubs or organizations such as <mark>legible</mark> scanned copies of checks or bank/PayPal statements showing deposits**

- **<mark>Legible</mark> scanned copies of receipts or paid invoices for purchases**

- **Spreadsheet summarizing expenses**

Rotary

Adequate financial documentation (contd):

- <mark>Legible</mark> bank records:

  - Statement from a bank website showing copy of canceled check

  - An electronic fund transfer receipt

  - A scanned image of both sides of a canceled check

  - A credit card statement

STEWARDSHIP
District Grants 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 Grants 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 the Rotary.org or DACdb are <mark>LEGIBLE</mark>**

- **Obtain all necessary signatures and <mark>SUBMIT</mark> for District approval**

Rotary

STEWARDSHIP
Questions??

Nancy Brooks, Chair

nancybrooks@charter.net

828-252-7441 (home) or 828-734-9403 (mobile)

CREATE HOPE
in the WORLD