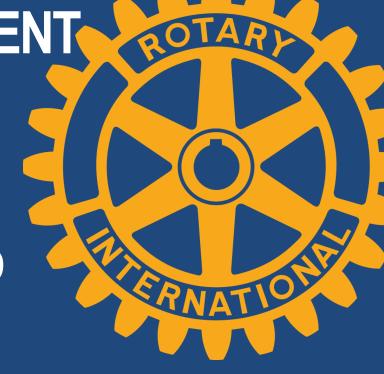
GRANTS MANAGEMENT SEMINAR

Grants Stewardship



Nancy Brooks
Foundation Stewardship Chair



STEWARDSHIP District Foundation Stewardship Committee

Nancy Brooks, Chair
Billi Black
Judy Domer



Stewardship

Careful and Responsible Management of Rotary International Grant Funds



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



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



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 the Rotary Mark



STEWARDSHIP District Grants 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 Grants Application Specifications

Adequate financial documentation (contd):

- Legible 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 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)



DISTRICT Presented to from the Rotary Club of **Asheville** for outstanding service in promoting The Rotary Foundation and its goal of world understanding and peace. The Rotary Foundation

