

HOW TO COMPLETE A DISTRICT SIMPLIFIED GRANT REPORT

Reporting is an integral part of the District Simplified Grant (DSG) process. Submitting regular and timely reports serves a number of purposes, including the following:

- Celebrates the success of your project
- Communicates your accomplishments to District 5520 (D5520) and The Rotary Foundation (TRF)
- Demonstrates that D5520 and TRF funds were used appropriately and effectively
- Provides transparency in the use of D5520 and TRF funds
- Meets legal requirements of D5520 and TRF
- Offers an opportunity to reflect on lessons learned
- Keeps your club in good standing with D5520 and D5520 in good standing with TRF

A final report is due within two months of the project's completion but no later than the June 30 end of the Fiscal Year. A copy of the District Simplified Grant Final Report Form is available on the D5520 website (<http://www.rotary5520.org/foundation/grants.html>).

PROJECT INFORMATION

Explanation

The first section of the District Simplified Grant report form asks you to provide the following information:

- District Simplified Grant number
 - The DSG number is assigned by the D5520 Grant Chair. It consists of the following:
 - A 2-digit number representing the Fiscal Year (FY) of the appropriated funds; for example "10" is used for FY 2010 (i.e., calendar years 2009-2010) and "11" is used for FY 2011 (i.e., calendar years 2010-2011)
 - An "SG" standing for "Simplified Grant" as opposed to "MG" which will stand for "Matching Grant"
 - A 1- or 2-letter indication of the source of the project's funding; for example an "R" indicates that the project is funded by TRF DSG funds, a "D" indicates that the project is funded by D5520 funds, a "J" after the "R" or "D" indicates that the project is jointly conducted with one or more other Rotary clubs.
 - A 4- or 5-digit number representing the club number of the host club.
 - A 1-digit number differentiating the different projects submitted by the host club; for instance "11SG-R-1291-2" would represent the second FY11 Simplified Grant which is funded by TRF funds and hosted by the Rotary Club of Albuquerque.
- Individual Project Report number
 - The Individual Project Report number is a number differentiating the several project reports submitted by the host club. The first report may be blank or "#1"; all subsequent reports will be sequentially numbered.

- Host Rotary Club
 - The Host Rotary Club is the “official” Rotary International name for your club followed by your club number. For instance, the Downtown Albuquerque club would be “Albuquerque - 1291”. (Remember that this report will be read by TRF staff members who are not familiar with the local names of clubs.)
- Indication of whether the report is a progress or final report
 - Check the appropriate block

PROJECT NARRATIVE (Block 1)

Explanation

In the project narrative section of the report you will include the following information:

- Original project objectives
- Actual project accomplishments
- When and where the project took place
- Who the beneficiaries were

When completing this section, it is helpful to refer back to the grant application. What was the original target? Remember to be specific and provide sufficient detail to adequately describe the project and its accomplishments to the TRF staff reviewing the project report. Remember that this your opportunity to explain the wonderful service your Rotary club provided to your community.

In the course of implementing the project, if you found it necessary to change the scope of the project you must explain the change and its rationale. Keep in mind that all changes must receive prior approval from the D5520 Grant Chair.

FAQ

Why do I need to list the original objectives?

Comparing the project’s original objectives with its actual accomplishments can be a helpful measure of success. It also offers the opportunity to note any lessons learned in implementing the project.

Did you remember...

1. To explain the original objectives of the project, as listed in the grant application?
2. To explain in detail (including the “what’s”, “when’s” and “where’s”) the actual project accomplishments?
3. To provide an explanation for any changes in scope?

ROTARIAN INVOLVEMENT AND OVERSIGHT (BLOCKS 2 & 3)

In this section you will explain how Rotarians managed and oversaw the project and how they actively participated in the project. Remember Rotarians must participate actively in the project, such as physically participating in the project, visiting the project site, working with the beneficiaries, and

publicizing the project to local media. Donating funds to the project does not constitute active involvement.

Provide detailed answers to the questions in this section. Be sure to include the number of Rotarians who participated in the project.

FAQ

What is the difference between Rotarian oversight and management of a grant and Rotarian participation?

Rotarian oversight and management refers to the controls that Rotarians put into place while implementing the project, to ensure that Trustee- and D5520 established criteria are met while proper stewardship is maintained. Rotarian participation is the voluntary involvement of the Rotarians to implement the project.

Did you remember...

1. To provide at least two examples of how your Rotarians actively participated in the project and/or oversaw and/or managed the project?
2. To list the number of Rotarians who participated in the project?

COMMUNITY IMPACT (BLOCKS 4, 5 & 6)

This section asks you to provide quantitative and qualitative information about the impact of the project on the benefiting community. Please indicate the number of people who benefited from the project. You may include in this number people who benefited both directly and indirectly.

Make sure to clearly explain the expected long-term impact of this project on the community.

If a cooperating organization was involved, describe its role in this project. See the D5520 website (<http://www.rotary5520.org/foundation/grants.html>) for the definition of a cooperating organization.

FAQ

How do I know what the long-term impact of the project will be?

Use your best judgment in answering this question. Based on the project's immediate impact on the benefiting community, you can make an educated guess about the project's long term impact.

Did you remember...

1. To indicate the number of people who benefitted from the project?
2. To describe the expected long-term community impact of the project?
3. To describe the role of cooperating organizations, if any, in the project?

FINANCIAL STATEMENT (BLOCKS 7, 8 & 9)

Explanation

In the financial statement portion of the report, you will clearly list all income received by the project and all expenses incurred during the course of the project. All items purchased during the course of the project should be listed on this page.

- The total project income and project expenses must match.
- Enter the D5520 grant amount on line 7.1.
- Enter your club's contribution on line 7.2.
- If there are other sources of income, include them on lines 7.3., etc.
- Summarize the expenditures on lines 8.1. through 8.6. All items \$25.00 or more must be accounted for.
- If there are a number of bills/invoices, you may want to list them on an Excel Spreadsheet to be referenced here and attached to the report along the bills/invoices.
- Your club must at least match D5520; if the project costs significantly less than projected, divide the cost by 2 and refund the difference from the D5520 grant to D5520. In the event the refund would be \$25.00 or less, no refund is required.

Please remember to attach the bills and/or invoices associated with the project.

Be sure to include the certifying signature on the report; the club President, other club officer or the project Point of Contact may sign the report.

FAQ

Do I need to submit receipts, bills, and/or invoices with the report?

Yes. D5520 is required by TRF to retain receipts for all expenditures.

Did you remember...

1. To provide a list of all income and expenses for the project.
2. To attach copies of receipts, bills and/or invoices with the report.

ADDITIONAL INFORMATION

Explanation

If you feel that your project clearly demonstrates Rotarian involvement and is worthy of publication, please submit an RI Newstip form, which can be found on the RI Web site.

D5520 requires copies of photographs and any print media coverage. Please provide captions for the photographs as well as date(s) and name of any media coverage. In the event of web-based coverage, please provide a printout of the coverage.

Hint

An easy way to attach captions to photographs is to create a Word document, insert the photographs and type the caption under each photo.