

# 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:

- Rotary Club
  - The 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.)
- Project Title
  - A concise title that best conveys what the project is about
- Indicate whether the report is a progress or final report
  - Check the appropriate block (to check the block, select it, right click, select Properties and select "Checked.")

## 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

When completing this section, it is helpful to refer to your 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?

## **COMMUNITY IMPACT (BLOCKS 2, 3 & 6)**

This section asks you to provide quantitative and qualitative information about the impact of the project on the benefiting community. Identify who the beneficiaries of this project were, how they were impacted, and what humanitarian need was met. Please indicate the number of people who benefited from the project. You may include in this number people who benefited both directly and indirectly.

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.

### **Did you remember...**

1. To indicate the number of people who benefitted from the project?
2. To indentify the beneficiaries of the project?
3. To describe the expected long-term community impact of the project?
4. To describe what humanitarian need the project met?
5. To describe the role of cooperating organizations, if any, in the project?

## **ROTARIAN INVOLVEMENT AND OVERSIGHT (BLOCKS 4 & 5)**

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?

## FINANCIAL STATEMENT (BLOCKS 7 & 8)

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.

- **Currency Used** is “USD”; **Exchange Rate** is “1 USD”; use “USD” where it asks for **Currency**
- 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.

## 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.

## **CERTIFYING SIGNATURE**

This is where a representative of your club certifies the information presented in the report. A club officer responsible for the project or the primary Rotarian point of contact for the project may sign here.

Besides your signature, be sure to include your PRINTED/TYPED name, your Rotary Title (i.e., President, Secretary, Director, or Rotary Project Officer) and the official name of your club (not the name you use).

## **ITEMS TO BE COMPLETED BY THE DISTRICT ROTARY FOUNDATION CHAIR**

- District Simplified Grant number
  - The FY2012 District Simplified Grant is “DS1274345”.
  - The FY2013 District Simplified Grant is “DS1376387”.
- Individual Project Report number
  - The DSG number is assigned by the D5520 Grant Chair and is contained in the email announcing your project’s approval. It consists of the following:
    - A 2-digit number representing the Fiscal Year (FY) of the appropriated funds; for example “12” is used for FY 2012 (i.e., calendar years 2011-2012) and “13” is used for FY 2013 (i.e., calendar years 2012-2013)
    - 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. This is available in the email announcing your project’s approval.
    - 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 “12SG-R-1291-2” would represent the second FY12 Simplified Grant which is funded by TRF funds and hosted by the Rotary Club of Albuquerque.

## **ADDITIONAL INFORMATION**

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.