District Simplified Grant Report Instructions

Complete and return to
The Rotary Foundation
1560 Sherman Avenue, Evanston, IL USA 60201
Fax: 847 556 2151, E-mail: contact.center@rotary.org

Preparing and submitting a District Simplified Grant (DSG) report

Step 1: Collect and review Individual Project Report forms for each project. Please note that all sections of the Individual Project Report form must be completed. For club projects, the certifying signature must be provided by a member of the club.

Step 2: If necessary, follow up with project contacts to complete missing report information or to address eligibility issues. Please refer to the DSG Eligibility Guidelines.

Step 3: Complete the District Simplified Grant Summary Report including the list of individual projects (pages 2-3 of this document).

Step 4: Submit District Simplified Grant Summary Report with accompanying bank statement(s) and Individual Project Reports to The Rotary Foundation. (Note: Individual Project Reports must be accompanied by a District Simplified Grant Summary Report. Do not send Individual Project Reports separately.)

Please note the following:

- The Foundation requires that a district submit DSG reports that include eligible expenditures totaling at least 50% of one DSG before payment is made on another DSG.
- Progress reports are required at least every 12 months, and a final report is required within two months of the full expenditure of grant funds. However, it is not recommended that districts wait the full 12-month period between a progress report and a final report. Early submission of reports will allow districts to avoid delays on the approval of future DSG grants.
- Reports must be submitted using the form below. *Please type the report*. Retain a copy of the entire report for your records.
- Clubs should retain original receipts for all grant-funded expenditures and provide copies to the district. The district must maintain copies of all receipts related to grant-funded expenditures in accordance with local laws and for a period of at least five years following closure of the grant. Do not send receipts to TRF unless requested by staff.
- If a project clearly demonstrates Rotarian involvement and is worthy of publication, you may choose to complete an RI Newstip Form, available on the RI website. Please attach action photos showing the beneficiaries or showing active Rotarian involvement.

District Simplified Grant Summary Report

Complete and return to
The Rotary Foundation
1560 Sherman Avenue, Evanston, IL USA 60201
Fax: 847 556 2151, E-mail: contact.center@rotary.org

Grant Information (to be completed by the District Rotary Foundation Committee Chair)

District Simplified Grant Number: _____ Sponsoring District: _____

Progress report ☐ Final report ☐

Provide an account of lessons learned by implementing this grant, and how the lessons learned will improve future grant-funded projects.

How has your district been impacted as a result of this DSG? Check all that apply.

- ☐ Involvement of Rotarians in our District in humanitarian grants has increased.
- ☐ Annual giving in our District has increased.
- ☐ Our District's awareness of the needs in our community has increased.
- ☐ Our District's international Rotary networks have been strengthened.
- ☐ Club membership in our District has increased.
- ☐ Participation in a District Simplified Grant has not changed our District in any significant way.

Given your experience, please provide any suggestions you believe would improve DSGs.

Financial Summary

Currency Used: _____ Exchange Rate: _____ = 1 USD

	Currency	Amount
DSG funds received		
Interest earned on DSG funds		
DSG funds distributed to individual projects		
DSG funds remaining in the district account		

Important notes

- Per Trustee policy, a district bank statement must be included with this report that clearly shows all district deposits and withdrawals related to the District Simplified Grant.
- For final reports, if there is less than US$200 remaining, please spend it on eligible items. If there is more than $200 remaining, it must be returned to TRF. [Note: In India, government rules require that all unutilized funds be returned to the Rotary International South Asia Office.]
- For grant awards over US$25,000, attach an Independent Financial Review to the final report.
- If your project involves a revolving loan fund you will need to attach a Report Supplement for Revolving Loan Grants.

Certifying Signature

On behalf of the District Rotary Foundation Committee, I certify that these District Simplified Grant funds were spent in accordance with the Terms and Conditions of District Simplified Grants Award and Acceptance.

Current District Rotary Foundation Committee Chair Name: _____

Current DRFC Chair Signature : _____ Date: _____

List of Individual Projects (to be completed by the District Rotary Foundation Committee Chair)

With each report to the Foundation, provide a summary of the grant funds distributed to individual projects and spent on project-related expenditures. Please ensure that the funds spent correlate directly to the attached Individual Project Reports.

#	Rotary Club	Project Description	DSG Funds Distributed	DSG Funds Spent	Individual Project Report Attached (Y/N)
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					
16.					
17.					
18.					
19.					
20.					
TOTAL					

Individual Project Report

Return this completed form to your District Rotary Foundation Committee Chair. Do not send this form directly to TRF.

Rotary Club: _____

Project Title: _____

Progress report ☐ Final report ☐

Project Description

1. Describe the project. What was done, when, and where did project activities take place? If this is a progress report, what remains to be done?

2. How many people benefited from this project? _____

3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?

4. How many Rotarians participated in the project? _____

5. What did they do? Please give at least two examples, not including financial support provided to the project.

6. If a cooperating organization was involved, what was its role?

Financial Report (District must retain receipts of all expenditures for at least five years)

Currency Used: _____ Exchange Rate: _____ = 1 USD

7. Income

Sources of Income	Currency	Amount
1. District Simplified Grant funds received from the District		
2. Other funding (specify)		
3.		
Total Project Income		

8. Expenditures (please be specific and add lines as needed)

Budget Items	Name of Supplier	Currency	Amount
1.			
2.			
3.			
4.			
5.			
Total Project Expenditures			

Certifying Signature

By signing this report, I confirm that to the best of my knowledge these District Simplified Grant funds were spent only for eligible items in accordance with Trustee-approved guidelines, and that all of the information contained herein is true and accurate. I also understand that all photographs submitted in connection with this report will become the property of RI and will not be returned. I warrant that I own all rights in the photographs, including copyright, and hereby grant RI and TRF a royalty free irrevocable license to use the photographs now or at any time in the future, throughout the world in any manner it so chooses and in any medium now known or later developed. This includes the right to modify the photograph(s) as necessary in RI's sole discretion. This also includes, without limitation, use on or in the web sites, magazines, brochures, pamphlets, exhibitions and any other promotional materials of RI and TRF.

Certifying Signature _____ Date: _____

Print name, Rotary title, and club _____

To be completed by the District Rotary Foundation Committee Chair:

District Simplified Grant # _____ Individual Project Report # _____