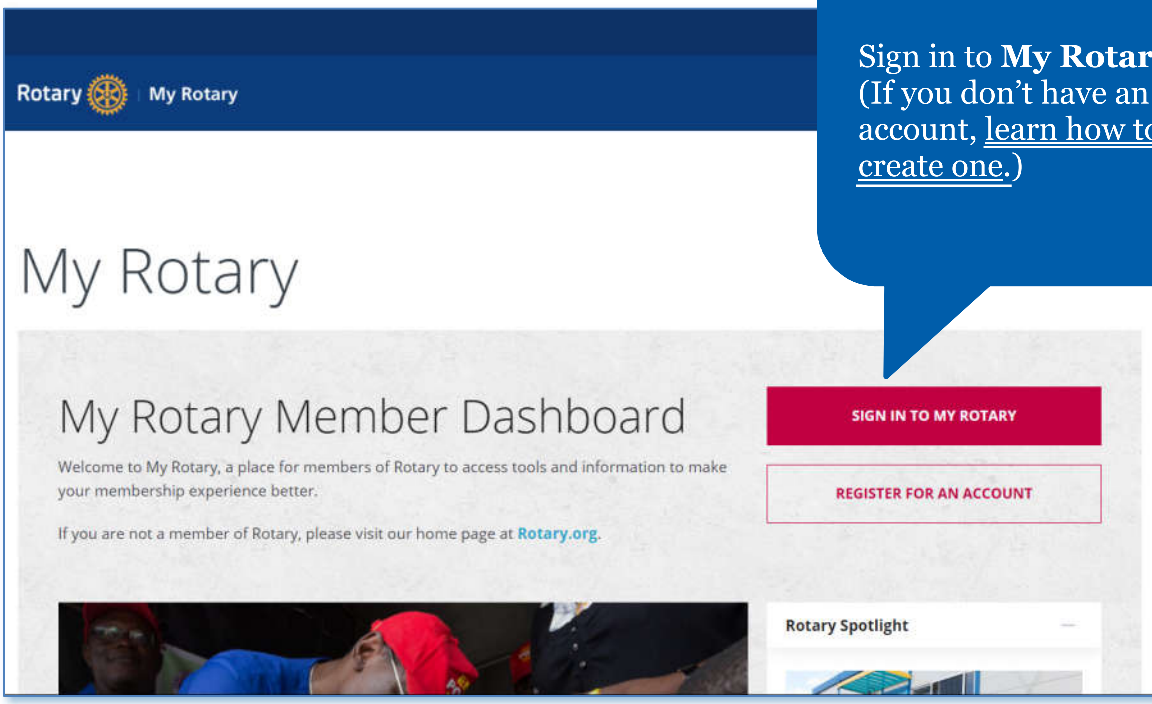
HOW TO USE THE GRANT CENTER

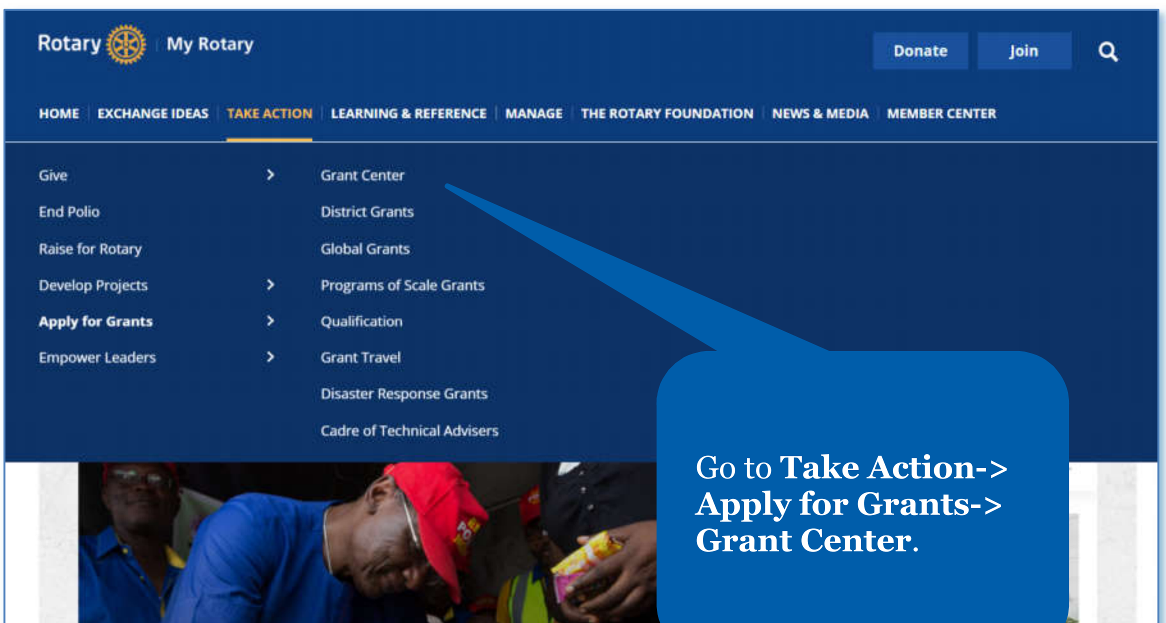
The Grant Center is the place to go for everything you need to do online for your Rotary Foundation grants, and it keeps all of Rotary's grant-related resources handy for you. This guide will show you how to:

For general information about grants, go to Rotary.org's Grants page.

Find the Grant Center

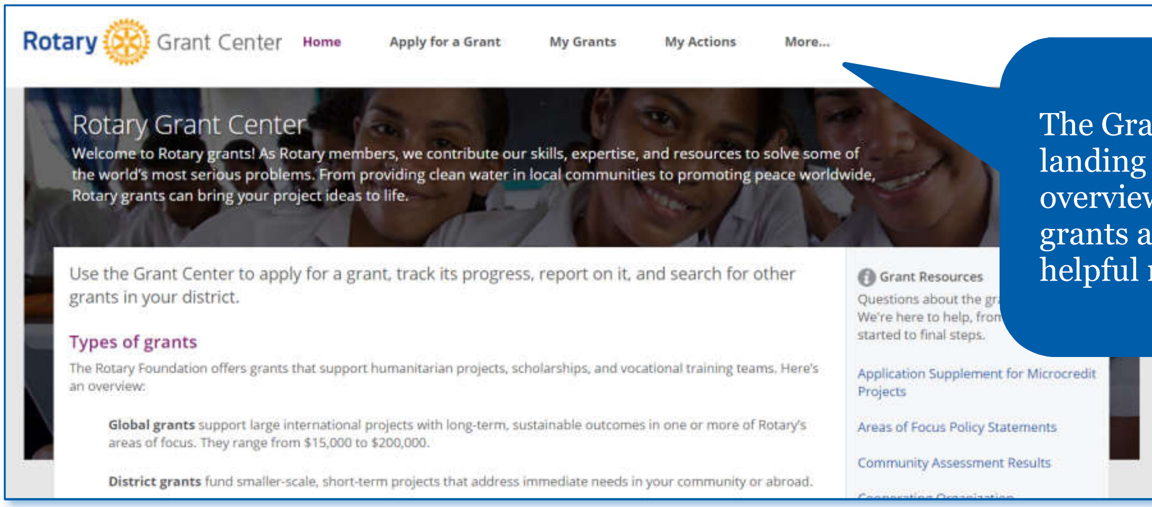


Sign in to **My Rotary**. (If you don't have an account, learn how to create one.)



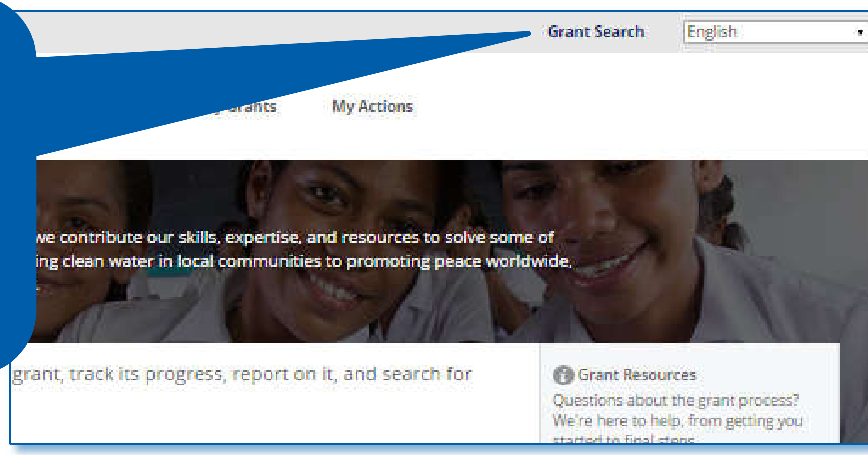
Go to **Take Action-> Apply for Grants-> Grant Center**.

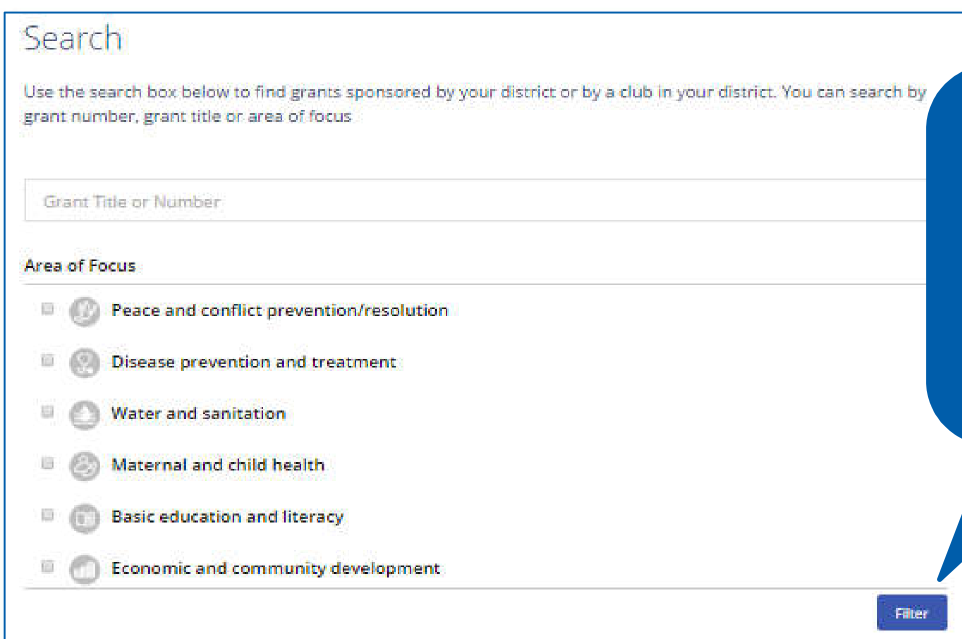
Navigate the Grant Center



The Grant Center's landing page gives an overview of Rotary grants and links to helpful resources.

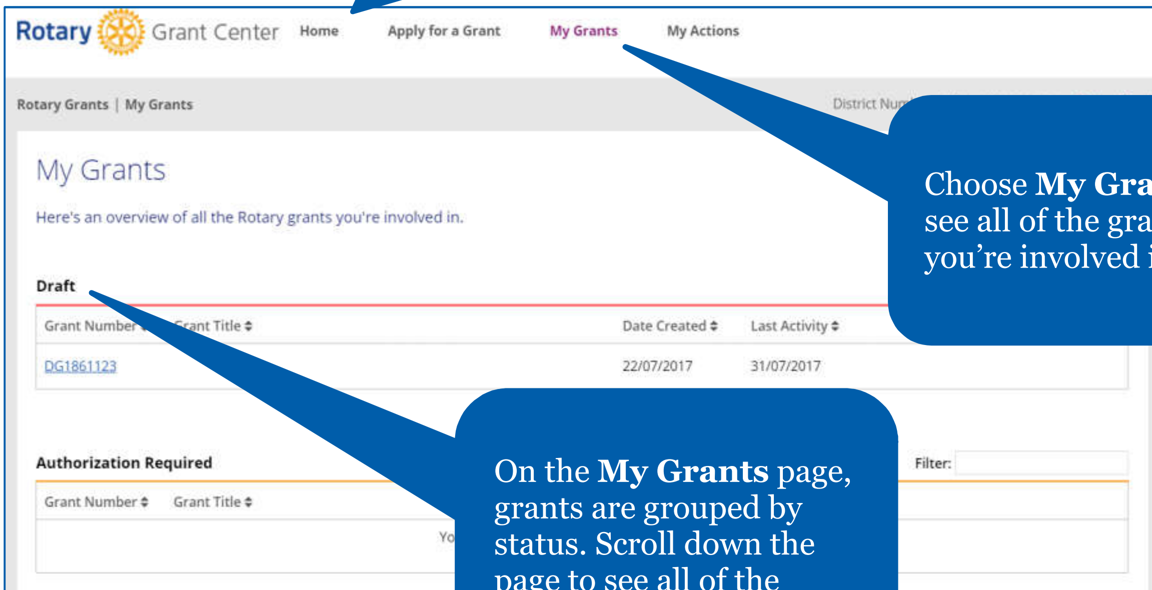
Use **Grant Search** to find all of the global and district grants sponsored by your district, whether or not your club is involved.





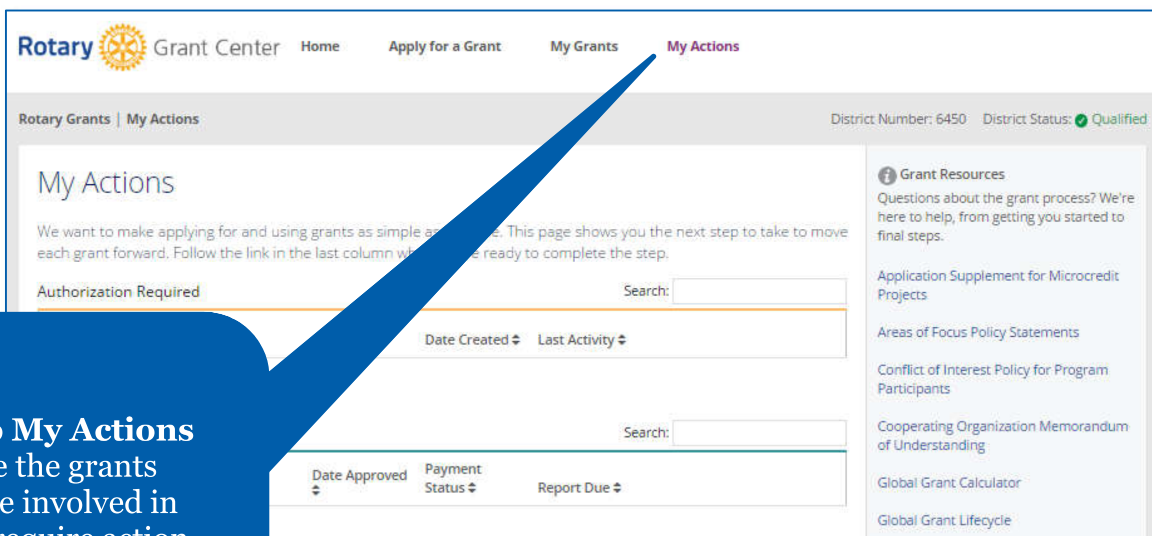
You can search for grants by number, title, or area of focus. After entering search criteria, use the **Filter** button.

Use the menus at the top to navigate the Grant Center.



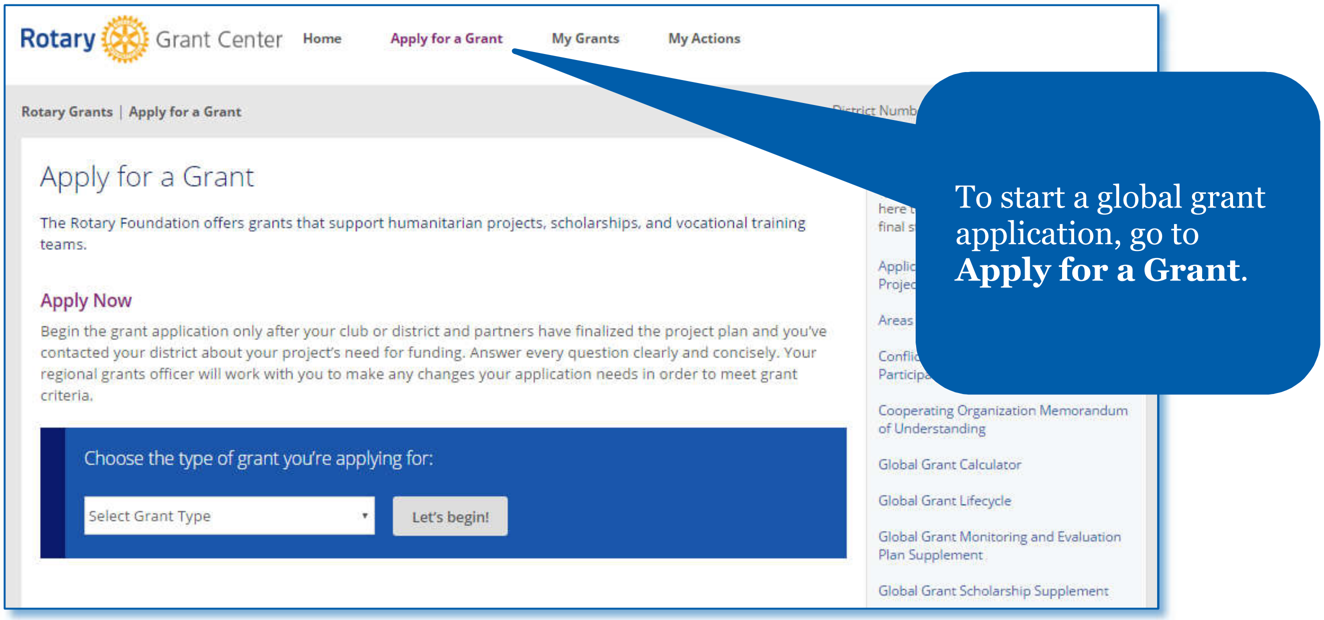
Choose **My Grants** to see all of the grants you're involved in.

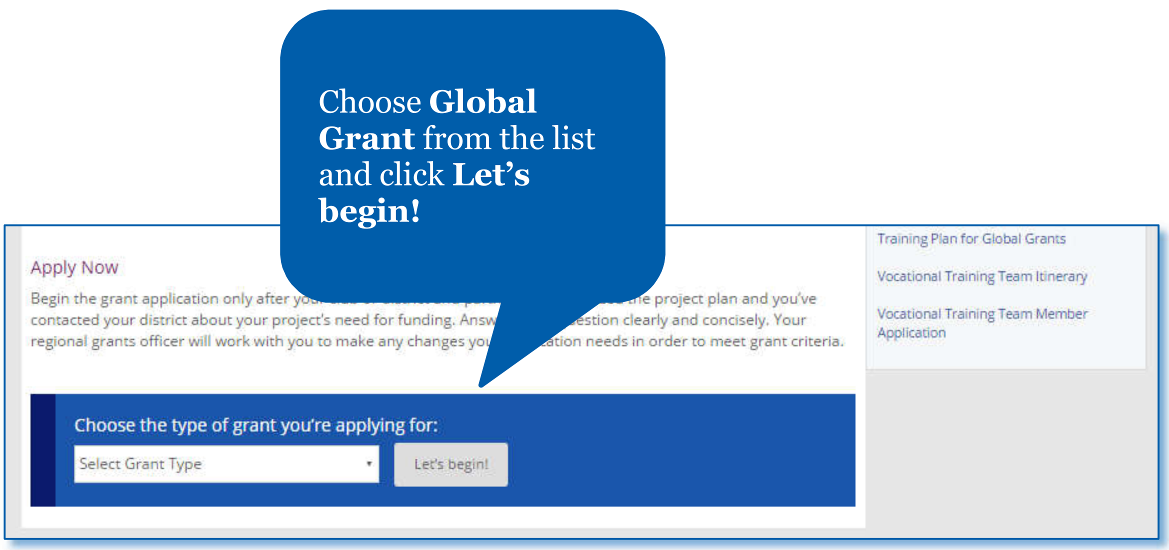
On the **My Grants** page, grants are grouped by status. Scroll down the page to see all of the grants in each status.



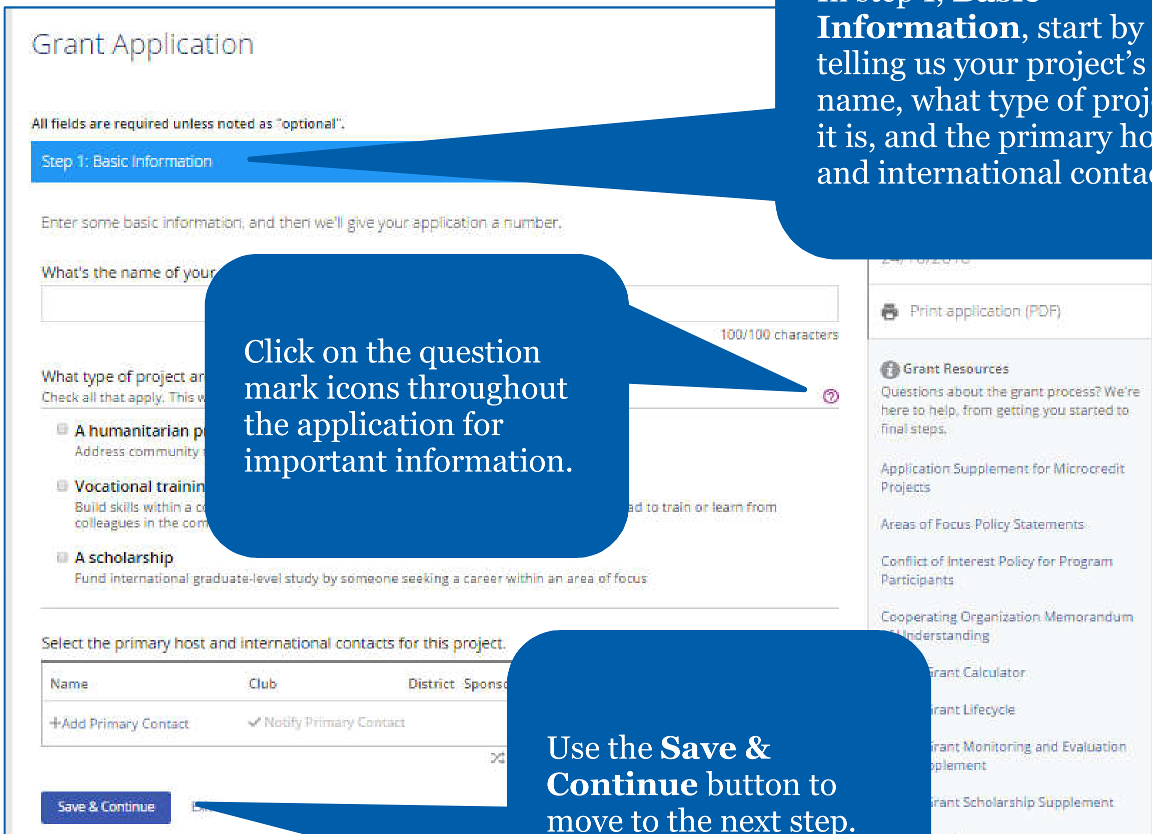
Go to **My Actions** to see the grants you're involved in that require action from you.

Apply for a Global Grant



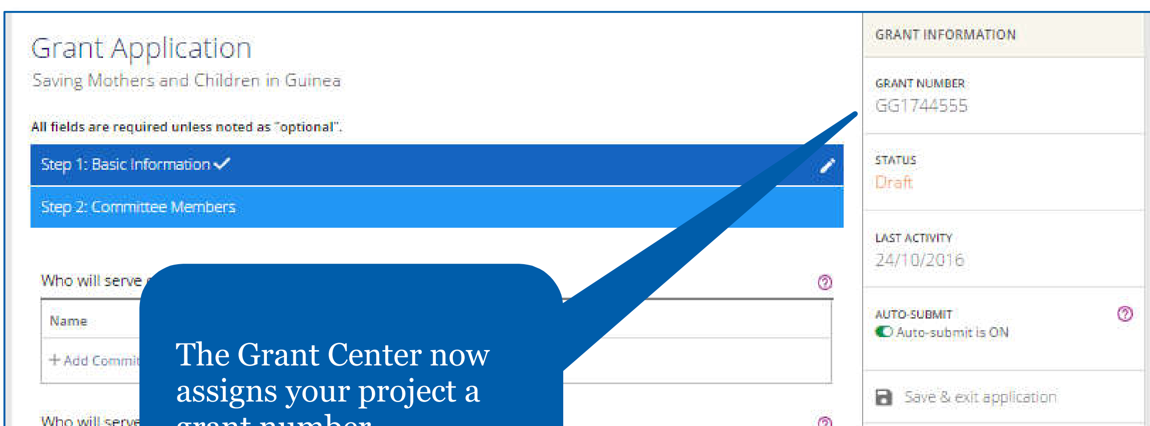


In step 1, **Basic Information**, start by telling us your project's name, what type of project it is, and the primary host and international contacts.



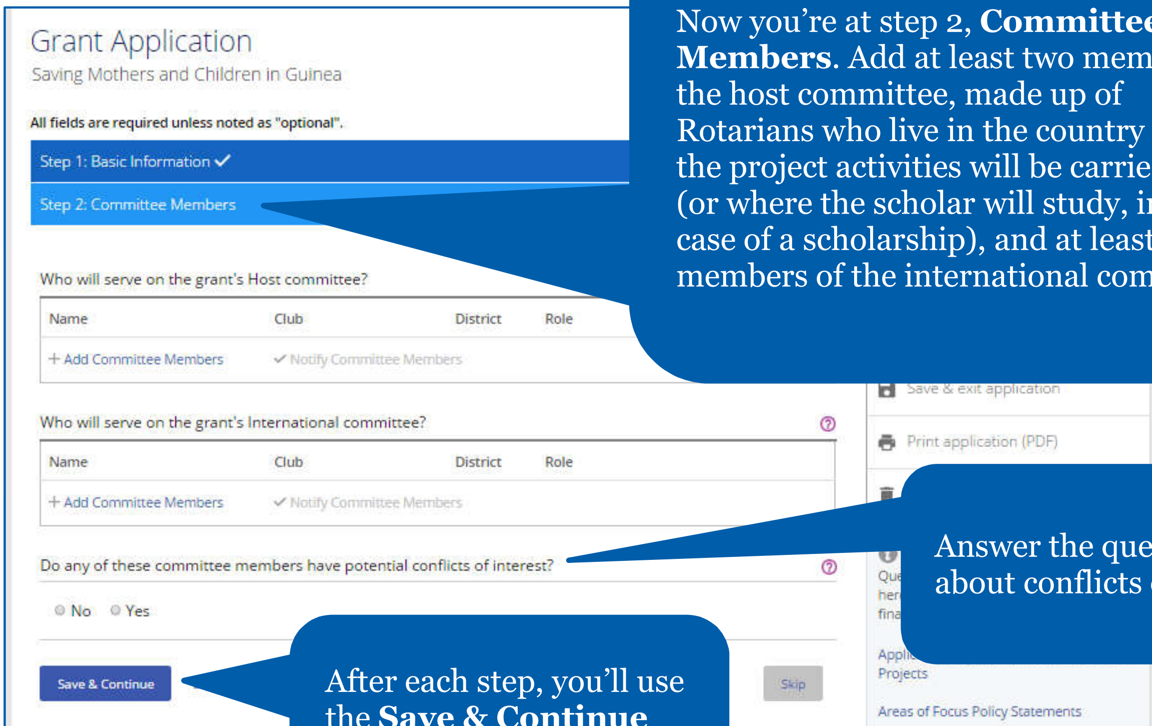
Click on the question mark icons throughout the application for important information.

Use the **Save & Continue** button to move to the next step.



The Grant Center now assigns your project a grant number.

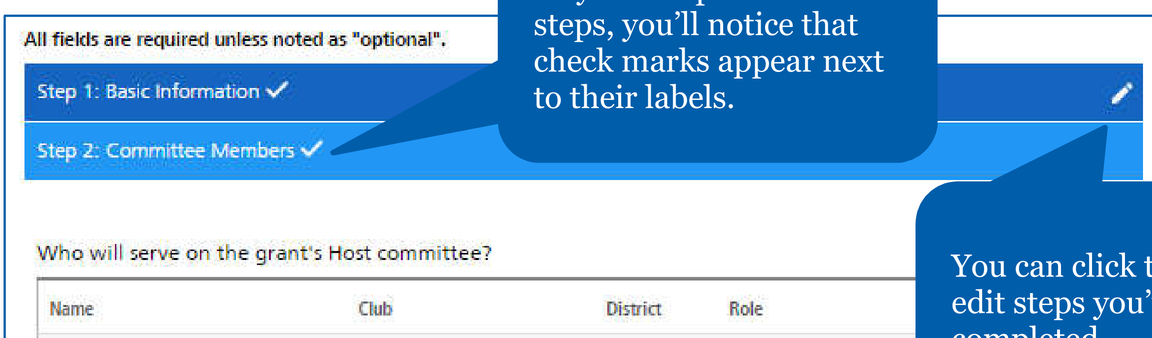
Now you're at step 2, **Committee Members**. Add at least two members of the host committee, made up of Rotarians who live in the country where the project activities will be carried out (or where the scholar will study, in the case of a scholarship), and at least two members of the international committee.



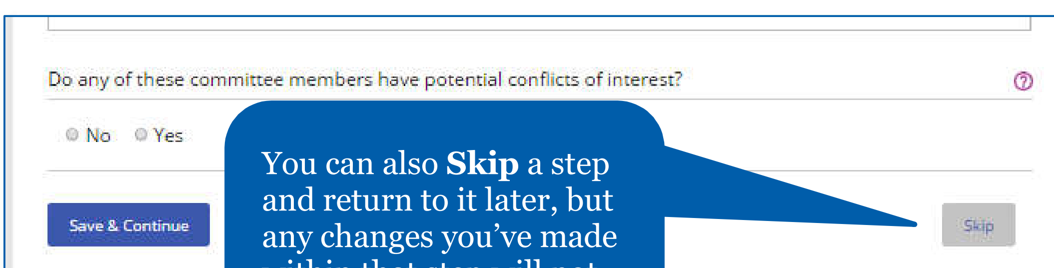
Answer the question about conflicts of interest.

After each step, you'll use the **Save & Continue** button to move to the next step.

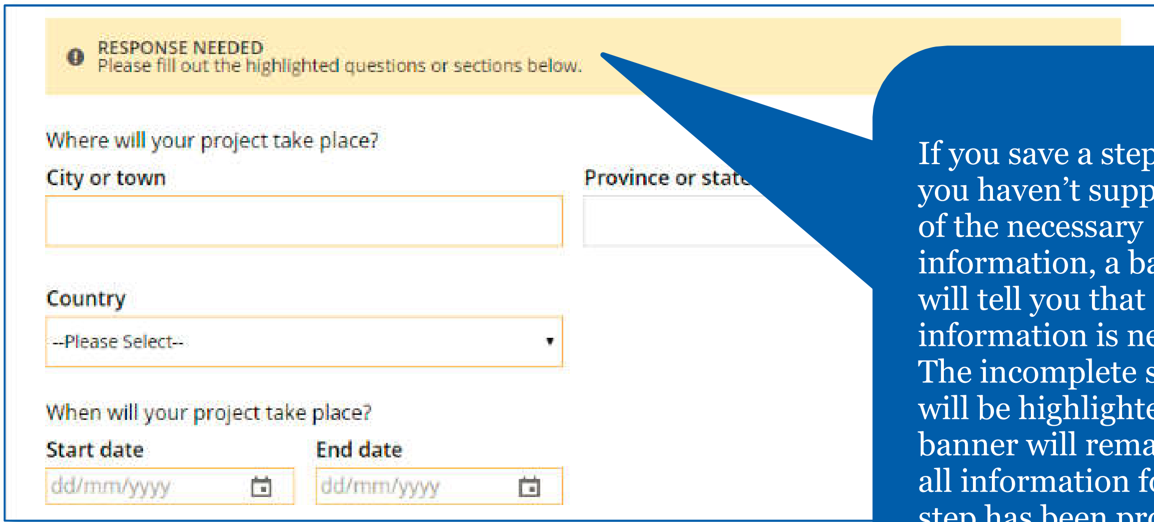
As you complete the steps, you'll notice that check marks appear next to their labels.



You can click the pencil to edit steps you've completed.

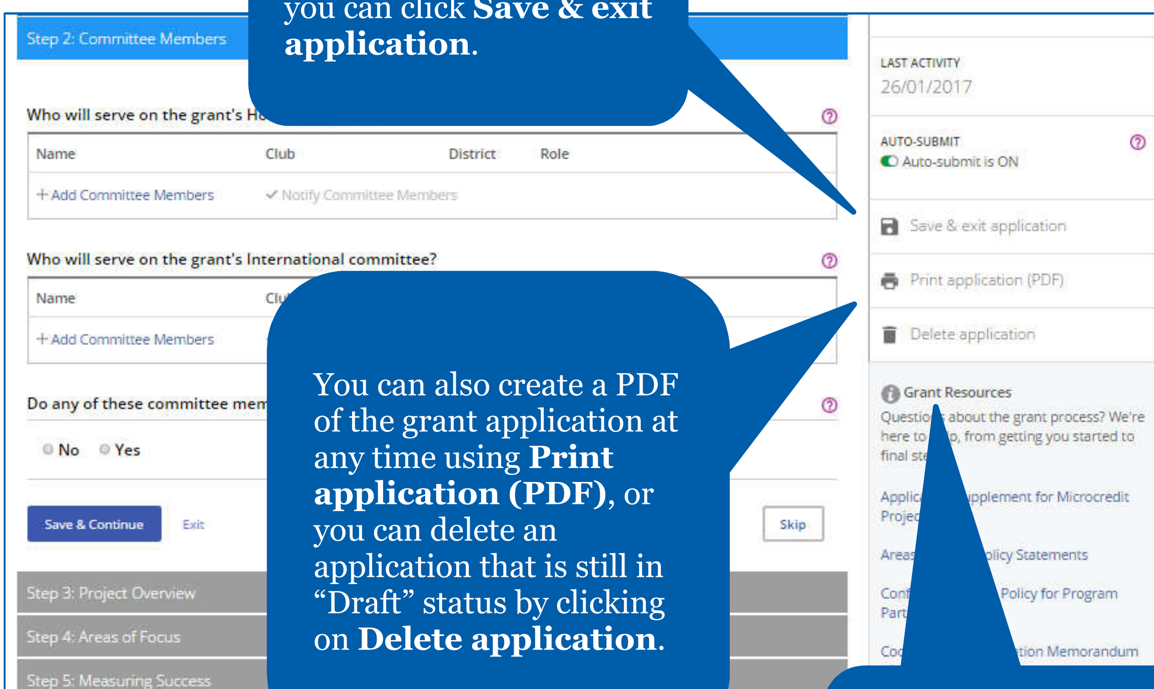


You can also **Skip** a step and return to it later, but any changes you've made within that step will not be saved.



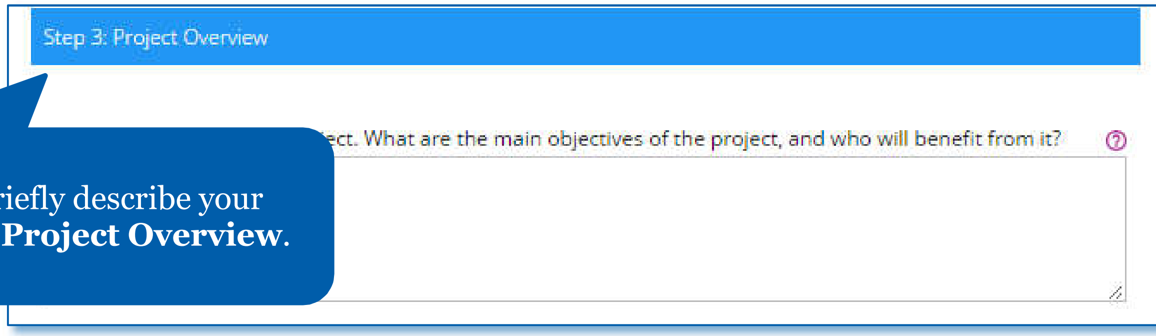
If you save a step when you haven't supplied all of the necessary information, a banner will tell you that more information is needed. The incomplete sections will be highlighted. The banner will remain until all information for the step has been provided.

Throughout the process, you can click **Save & exit application**.

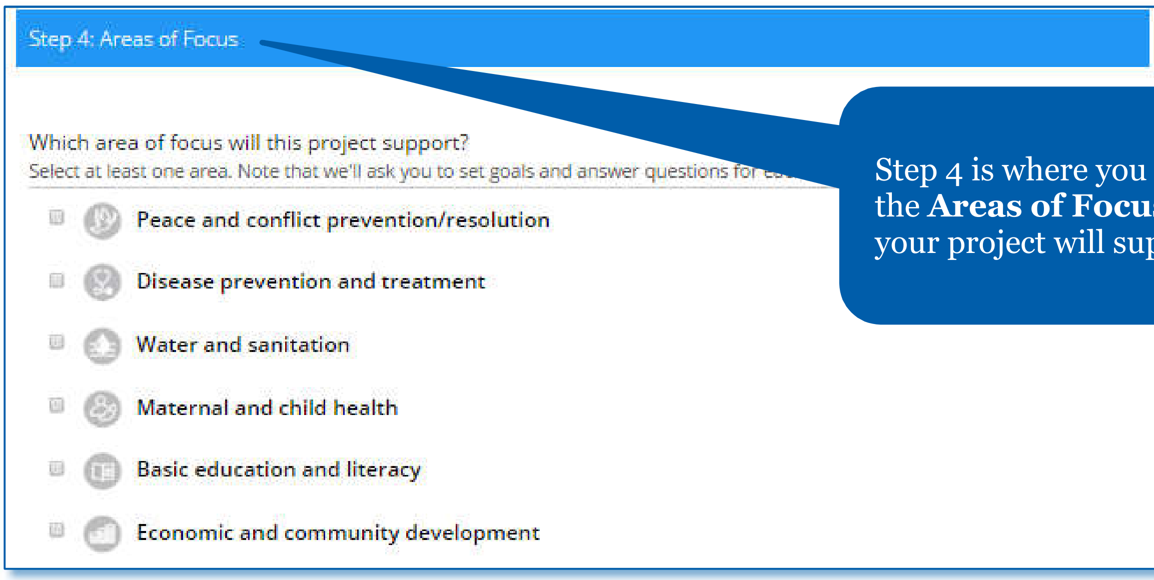


You can also create a PDF of the grant application at any time using **Print application (PDF)**, or you can delete an application that is still in "Draft" status by clicking on **Delete application**.

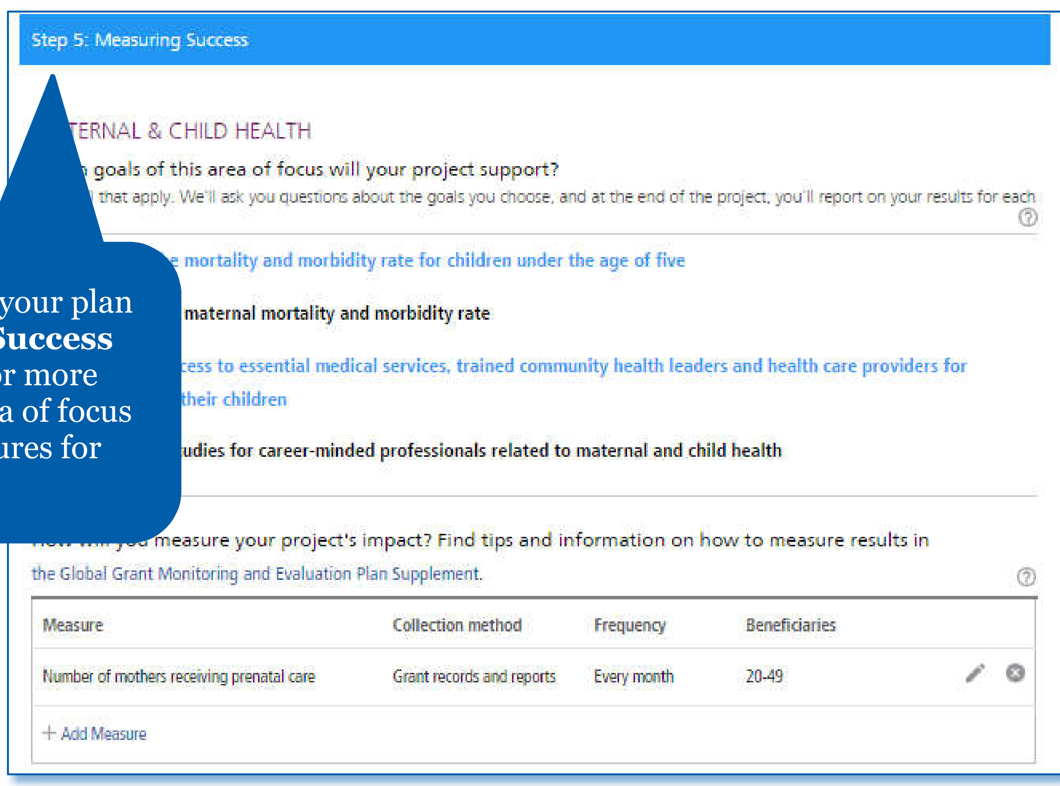
Helpful **Grant Resources** are listed at the bottom of the right-hand column.



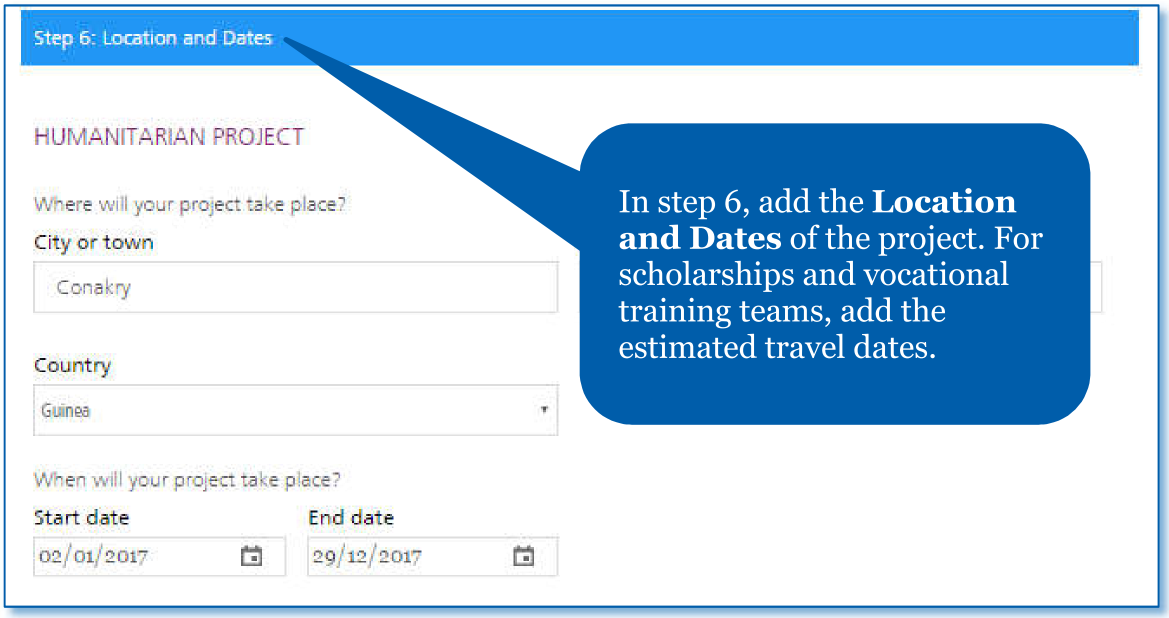
In step 3, briefly describe your project in a **Project Overview**.

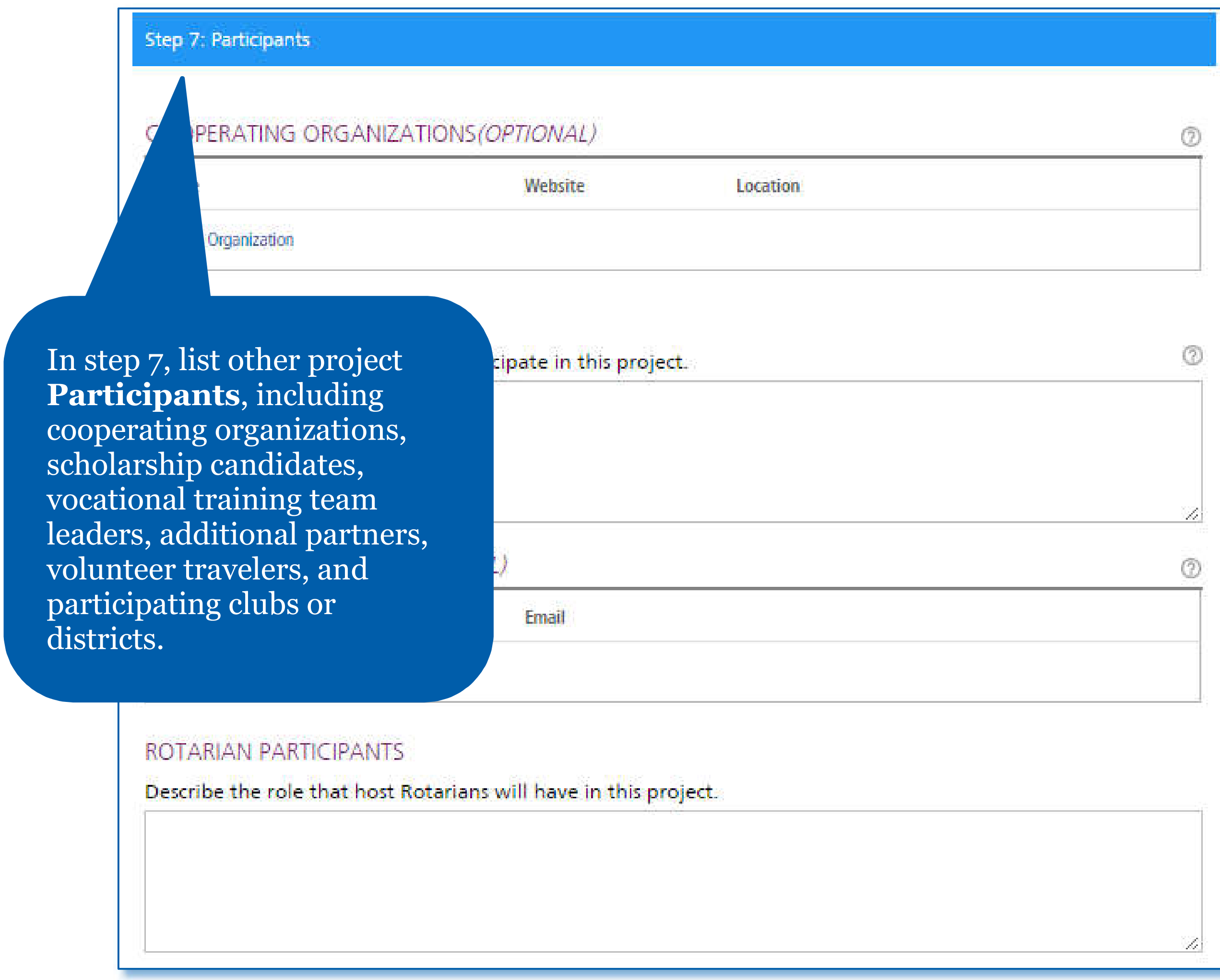


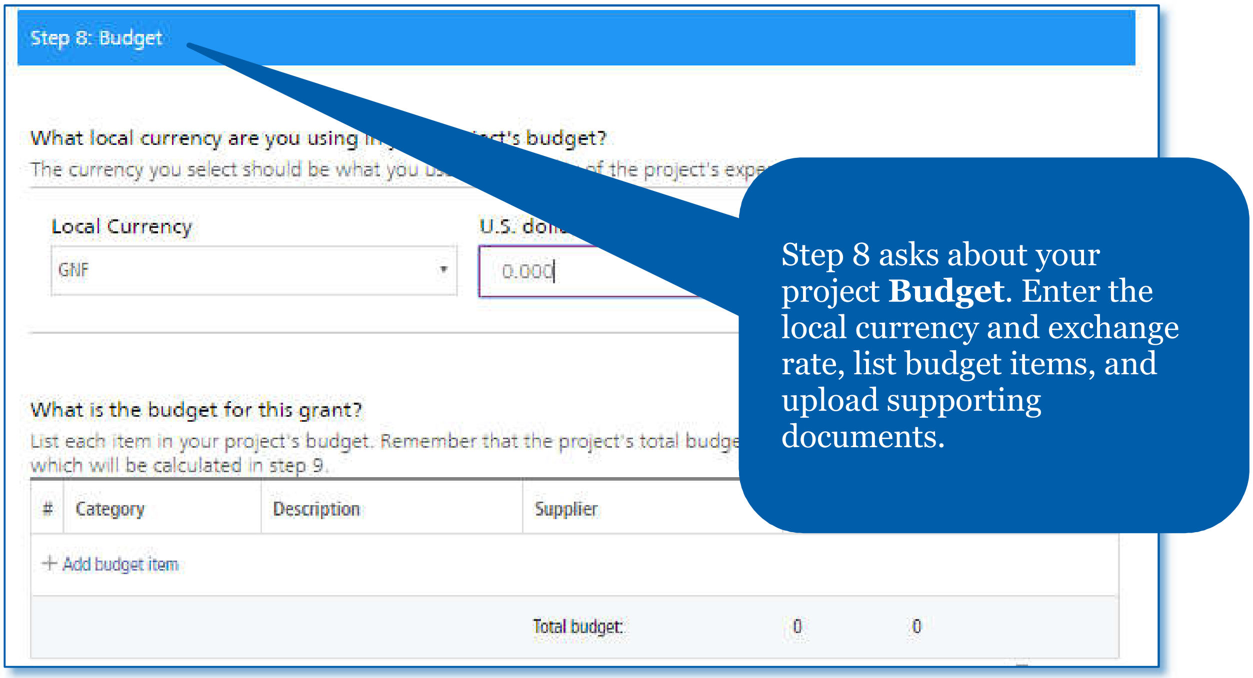
Step 4 is where you indicate the **Areas of Focus** that your project will support.

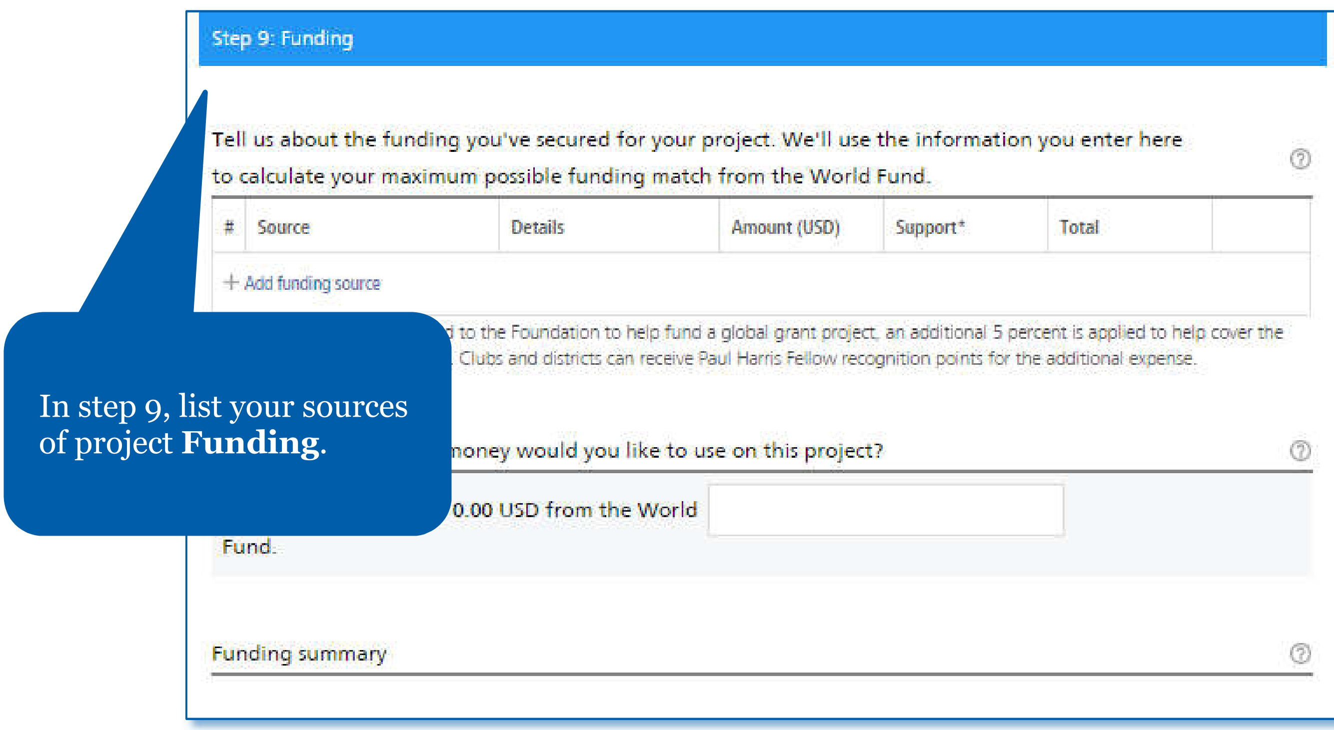


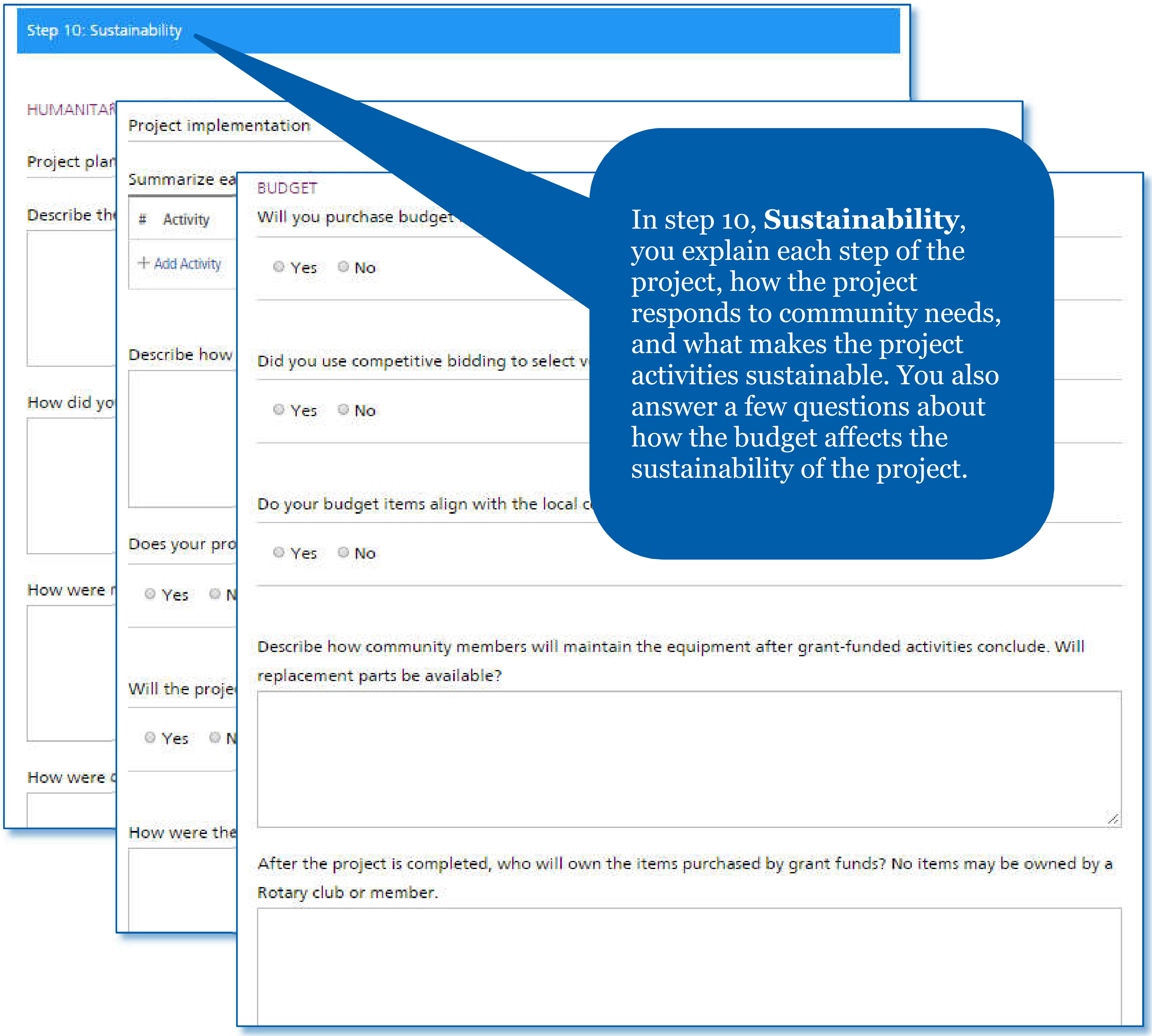
In step 5, outline your plan for **Measuring Success** by checking one or more goals for each area of focus and adding measures for each goal.


Step 6: Location and Dates
HUMANITARIAN PROJECT
Where will your project take place?
City or town
Conakry
Country
Guinea
When will your project take place?
Start date
02/01/2017
End date
29/12/2017
In step 6, add the **Location and Dates** of the project. For scholarships and vocational training teams, add the estimated travel dates.


Step 7: Participants
PERATING ORGANIZATIONS (OPTIONAL)
Website
Location
Organization
ipate in this project.
Email
ROTARIAN PARTICIPANTS
Describe the role that host Rotarians will have in this project.
In step 7, list other project **Participants**, including cooperating organizations, scholarship candidates, vocational training team leaders, additional partners, volunteer travelers, and participating clubs or districts.

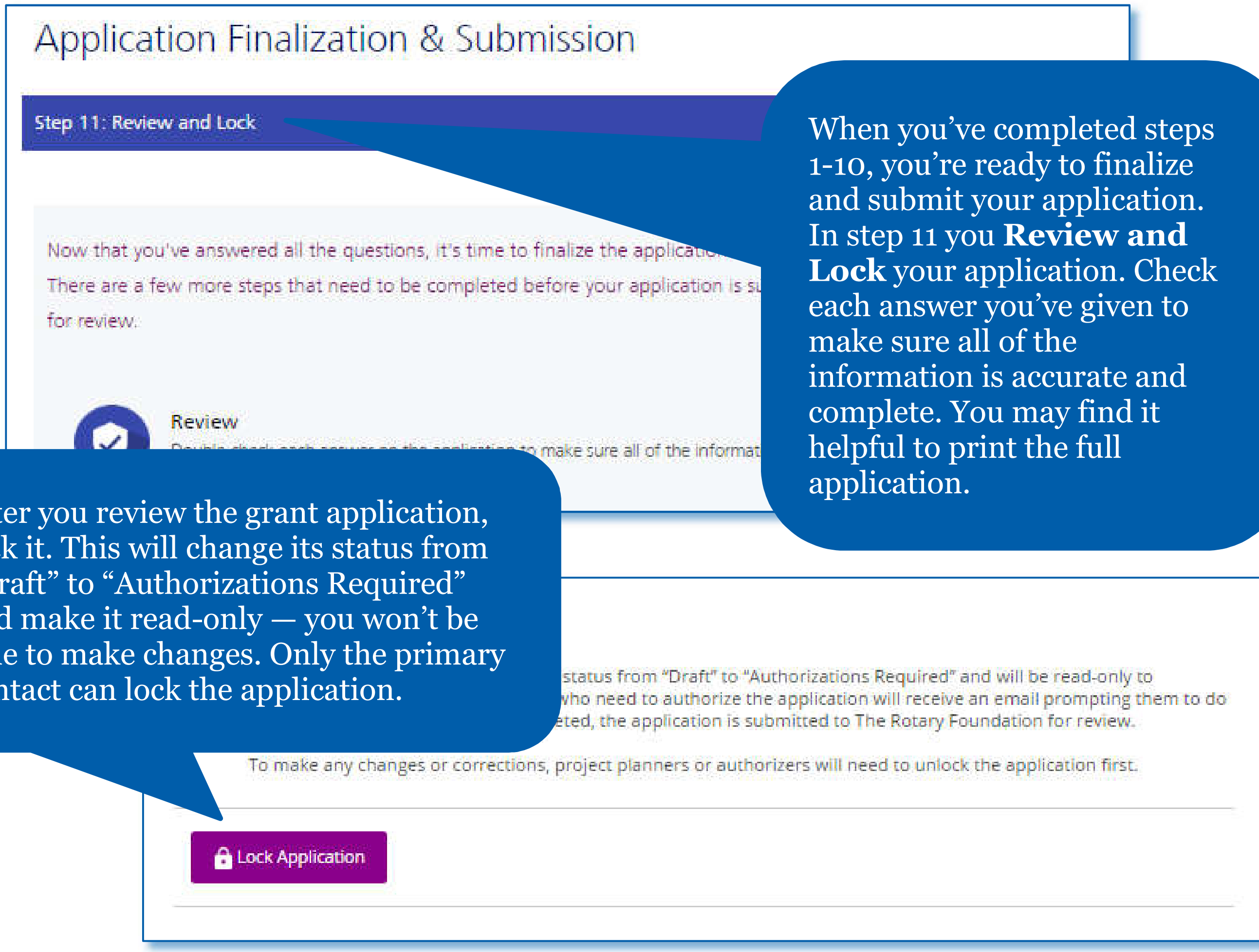

Step 8: Budget
What local currency are you using in your project's budget?
The currency you select should be what you use for the majority of the project's expenses.
Local Currency
GNF
U.S. dollar
0.000
What is the budget for this grant?
List each item in your project's budget. Remember that the project's total budget
which will be calculated in step 9.
Category Description Supplier
+ Add budget item
Total budget: 0 0
Step 8 asks about your project **Budget**. Enter the local currency and exchange rate, list budget items, and upload supporting documents.


Step 9: Funding
Tell us about the funding you've secured for your project. We'll use the information you enter here to calculate your maximum possible funding match from the World Fund.
Source Details Amount (USD) Support* Total
+ Add funding source
to the Foundation to help fund a global grant project, an additional 5 percent is applied to help cover the
Clubs and districts can receive Paul Harris Fellow recognition points for the additional expense.
money would you like to use on this project?
0.00 USD from the World
Fund.
Funding summary
In step 9, list your sources of project **Funding**.



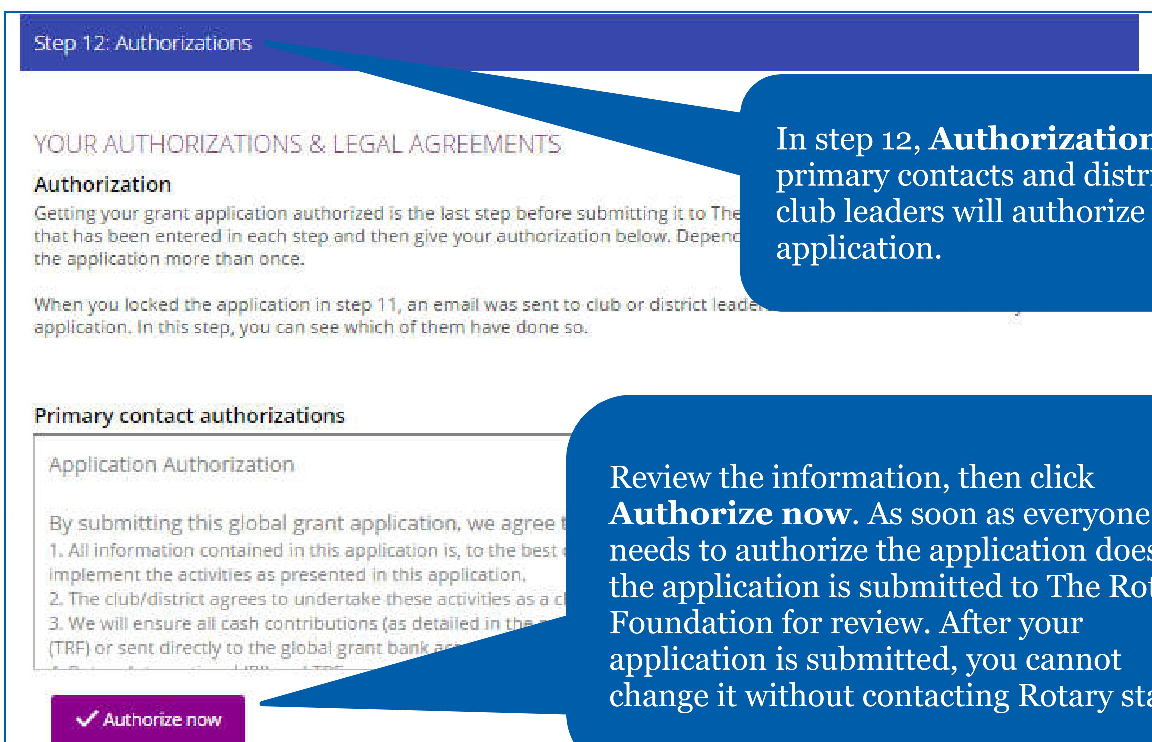
Step 10: Sustainability
HUMANITAR
Project plan
Describe th
How did yo
How were r
How were c
Project implementation
Summarize ea
Activity
+ Add Activity
Describe how
Does your pro
Yes N
Will the proje
Yes N
How were the
BUDGET
Will you purchase budget
Yes No
Did you use competitive bidding to select v
Yes No
Do your budget items align with the local c
Yes No
Describe how community members will maintain the equipment after grant-funded activities conclude. Will replacement parts be available?
After the project is completed, who will own the items purchased by grant funds? No items may be owned by a Rotary club or member.
In step 10, **Sustainability**, you explain each step of the project, how the project responds to community needs, and what makes the project activities sustainable. You also answer a few questions about how the budget affects the sustainability of the project.

Application Finalization & Submission



When you've completed steps 1-10, you're ready to finalize and submit your application. In step 11 you **Review and Lock** your application. Check each answer you've given to make sure all of the information is accurate and complete. You may find it helpful to print the full application.

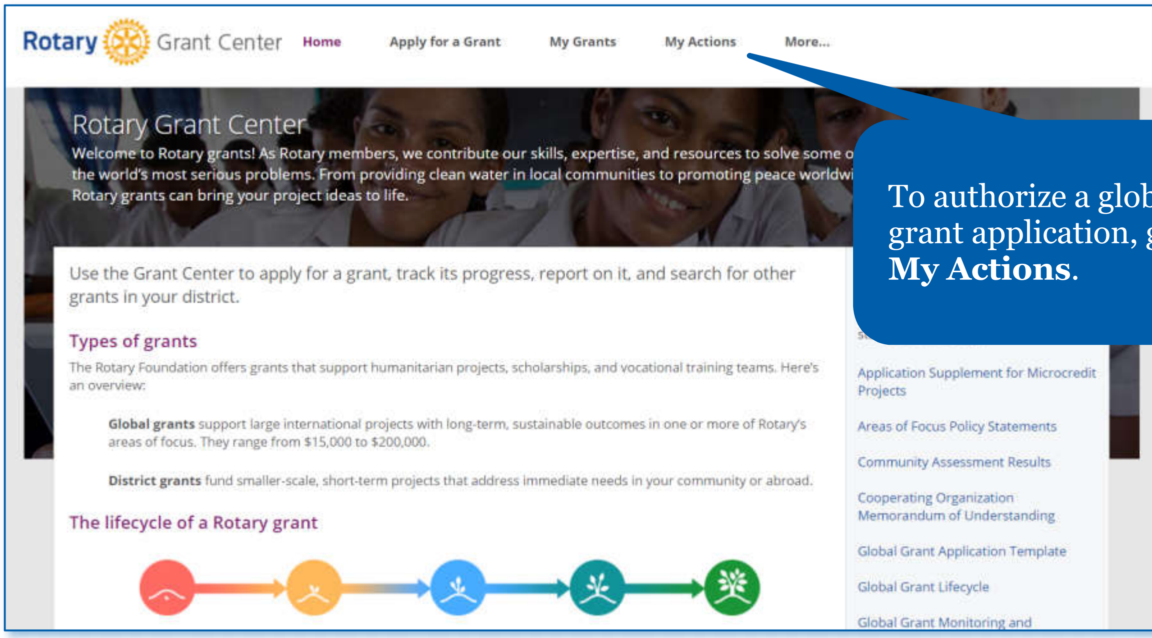
After you review the grant application, lock it. This will change its status from "Draft" to "Authorizations Required" and make it read-only — you won't be able to make changes. Only the primary contact can lock the application.



In step 12, **Authorizations**, the primary contacts and district and club leaders will authorize the application.

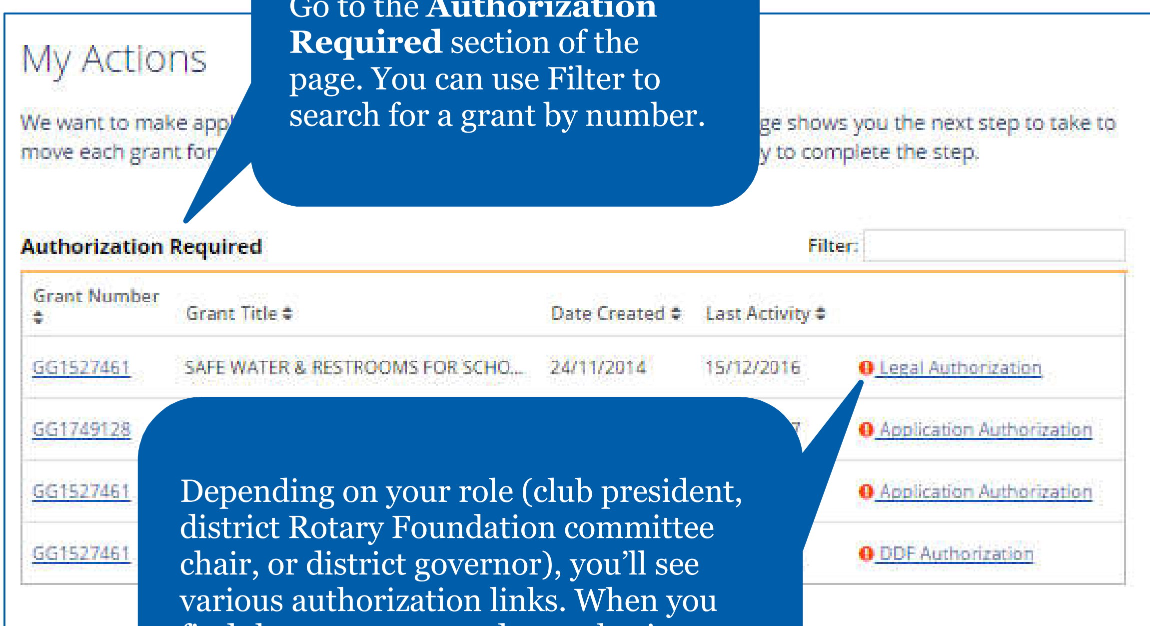
Review the information, then click **Authorize now**. As soon as everyone who needs to authorize the application does so, the application is submitted to The Rotary Foundation for review. After your application is submitted, you cannot change it without contacting Rotary staff.

Authorize a Global Grant Application (Club Presidents and District Leaders)



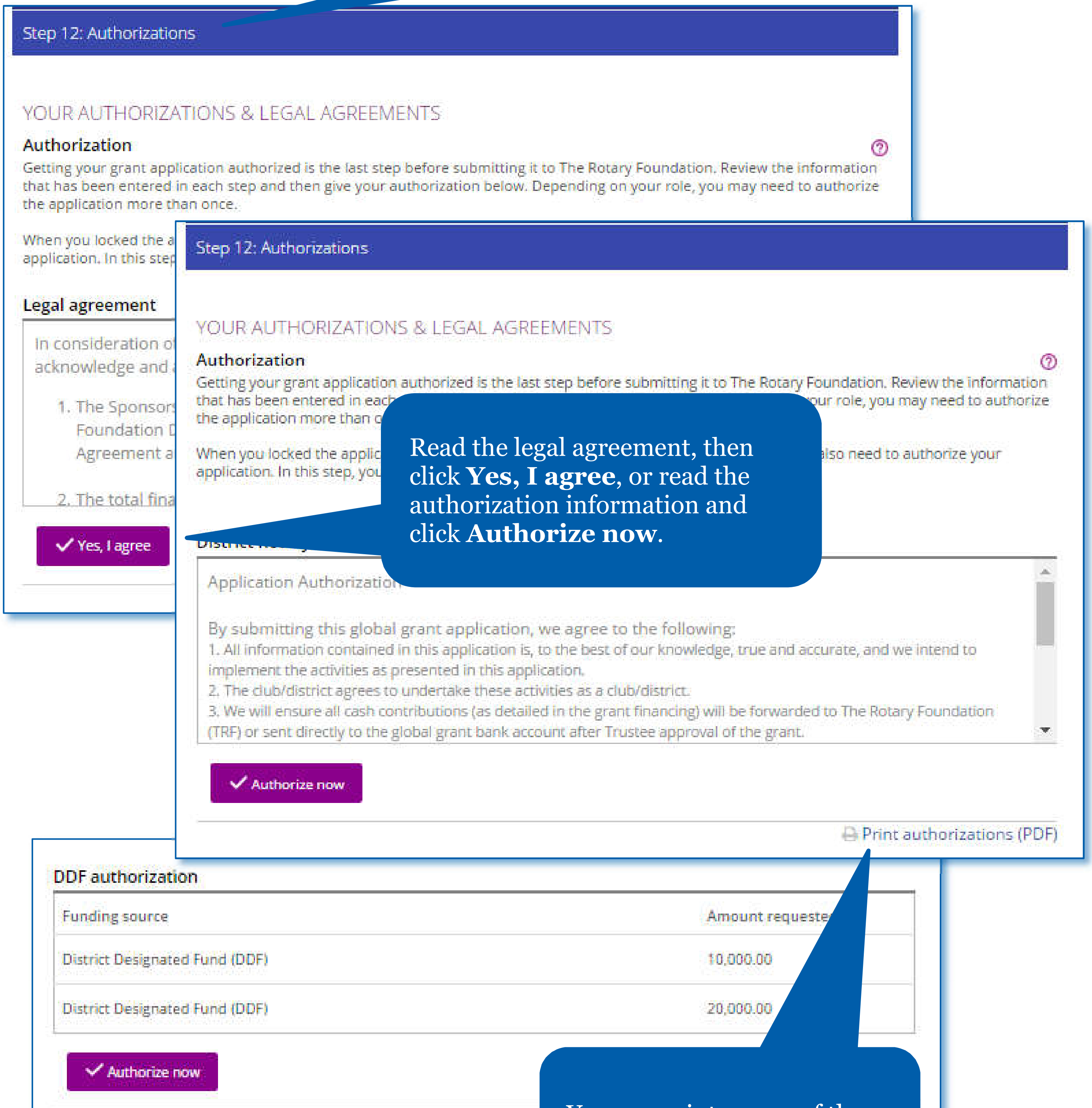
To authorize a global grant application, go to **My Actions**.

Go to the **Authorization Required** section of the page. You can use Filter to search for a grant by number.



Depending on your role (club president, district Rotary Foundation committee chair, or district governor), you'll see various authorization links. When you find the grant you need to authorize, follow its authorization link.

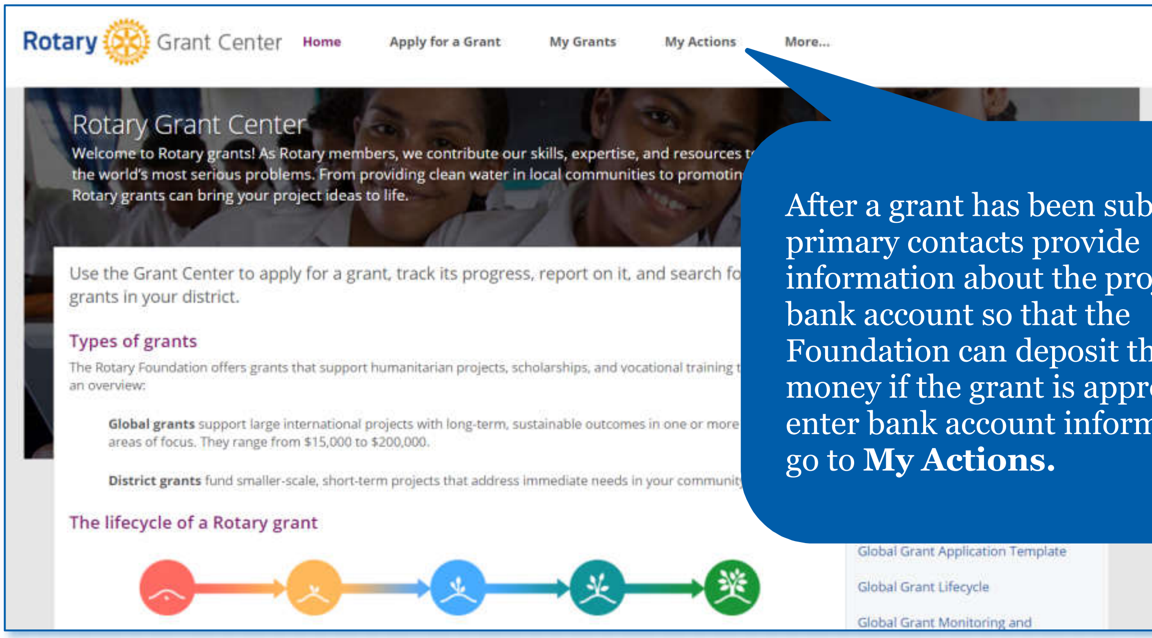
You'll be taken to step 12 of the application, **Authorizations**.



Read the legal agreement, then click **Yes, I agree**, or read the authorization information and click **Authorize now**.

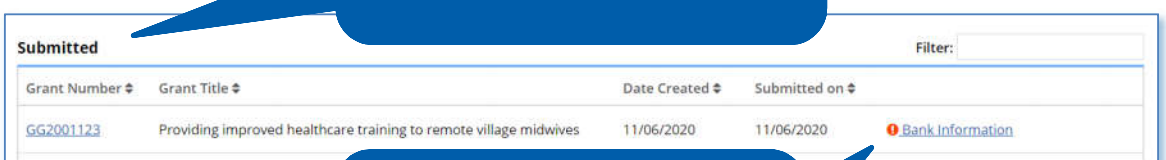
You can print a copy of the agreement for your records.

Enter Global Grant Bank Account Information

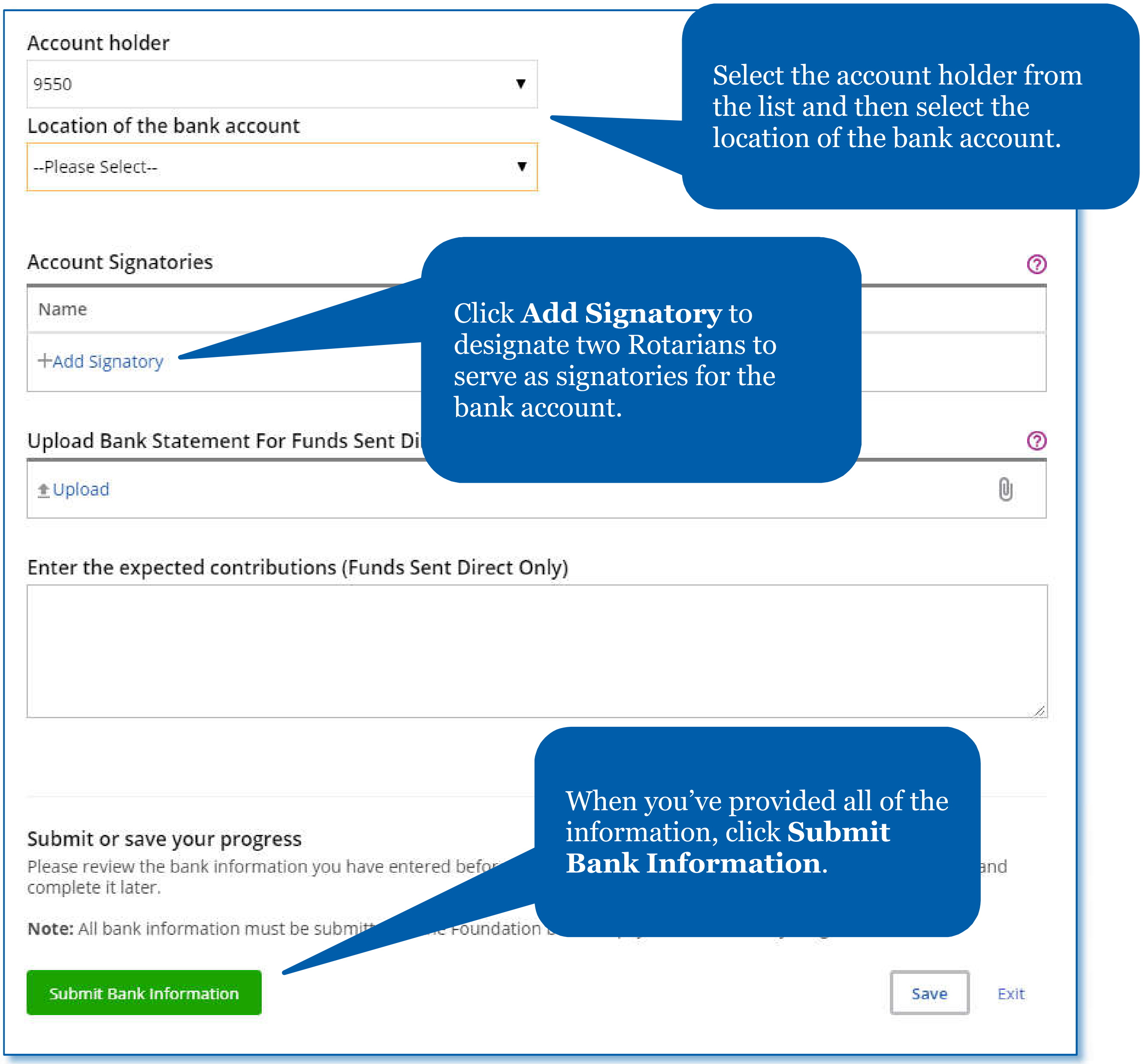


After a grant has been submitted, primary contacts provide information about the project bank account so that the Foundation can deposit the grant money if the grant is approved. To enter bank account information, go to **My Actions.**

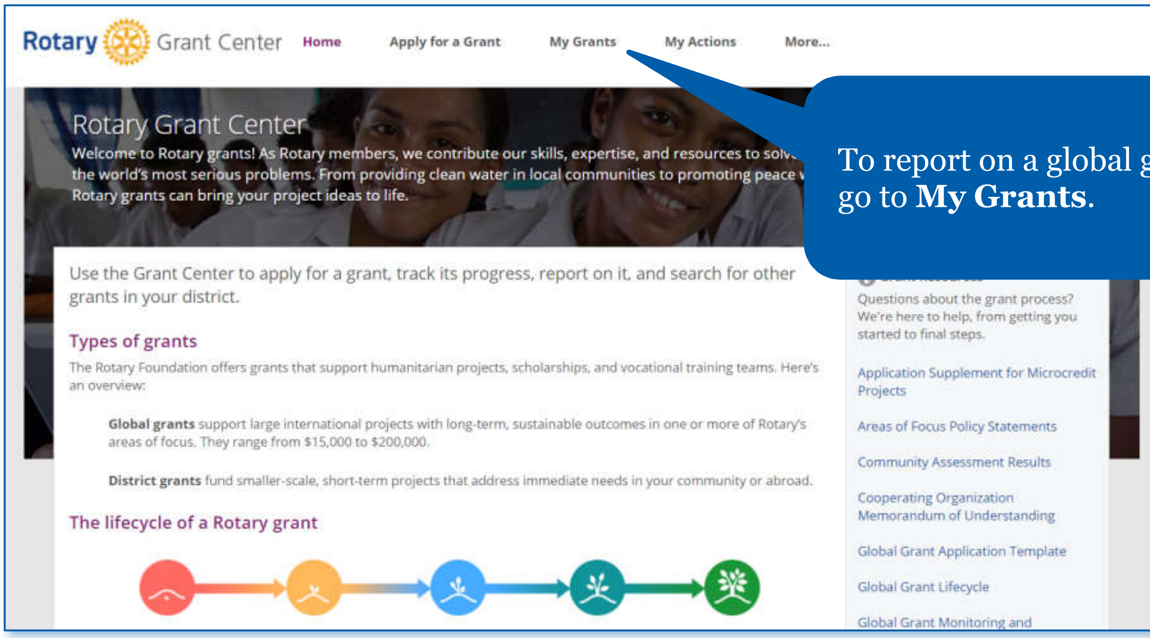
Go to the **Submitted** grants or use **Filter** to search for a grant by number.



When you find the grant, click **Bank Information**.

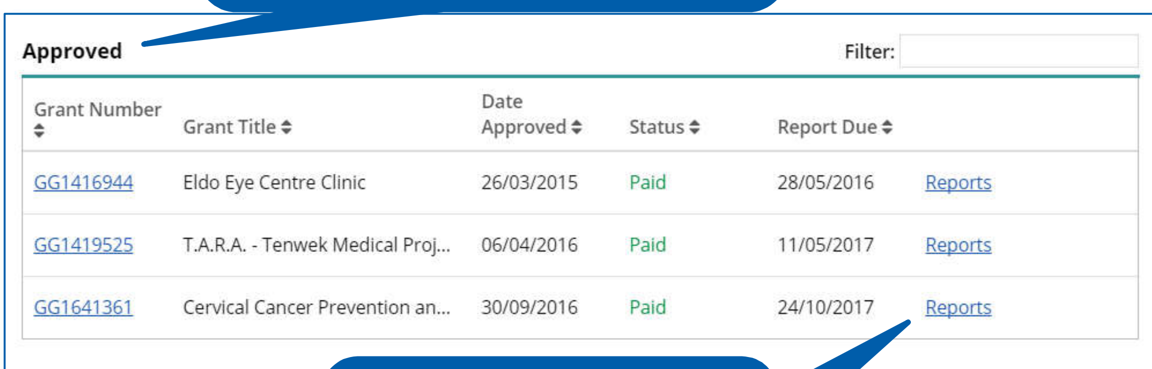

Account holder
9550
Location of the bank account
--Please Select--
Select the account holder from the list and then select the location of the bank account.
Account Signatories
Name
+Add Signatory
Click **Add Signatory** to designate two Rotarians to serve as signatories for the bank account.
Upload Bank Statement For Funds Sent Di
Upload
Enter the expected contributions (Funds Sent Direct Only)
When you've provided all of the information, click **Submit Bank Information**.
Submit or save your progress
Please review the bank information you have entered befor
complete it later.
Note: All bank information must be submitt
Submit Bank Information
Save
Exit

Report on a Global Grant



To report on a global grant, go to **My Grants**.

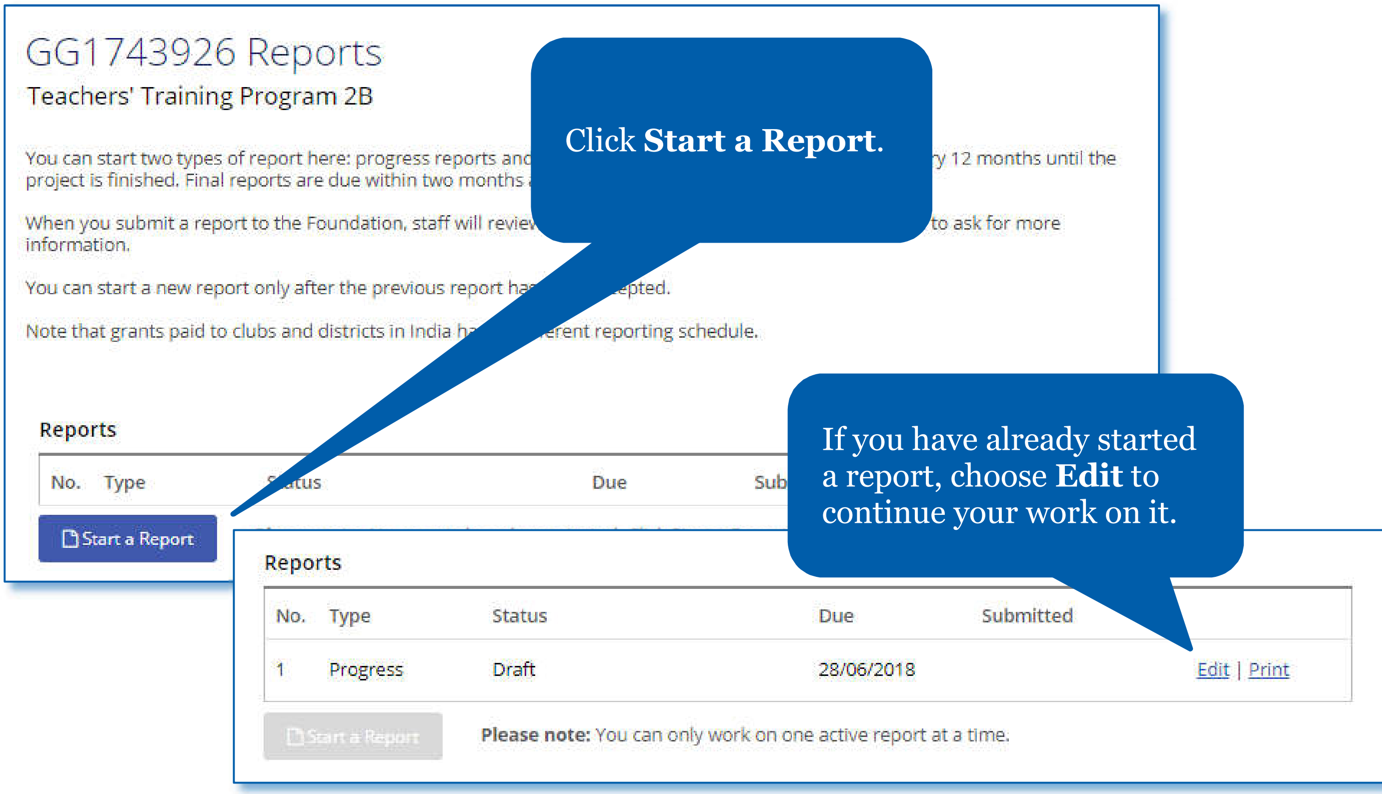
Go to the **Approved** grants section to see all of the approved grants that you're involved in or use **Filter** to search for a grant by number.

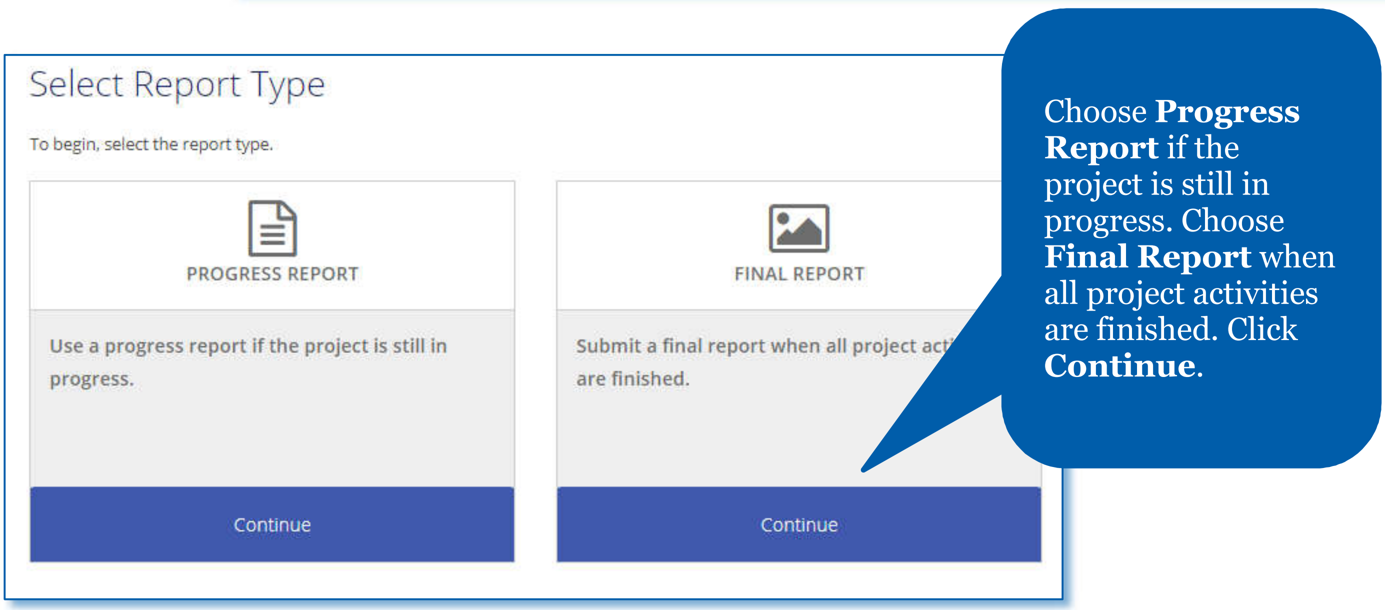


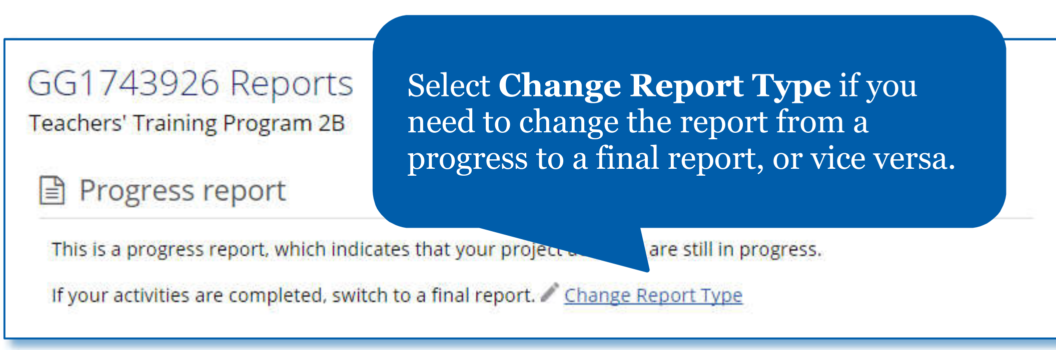
Approved Filter:

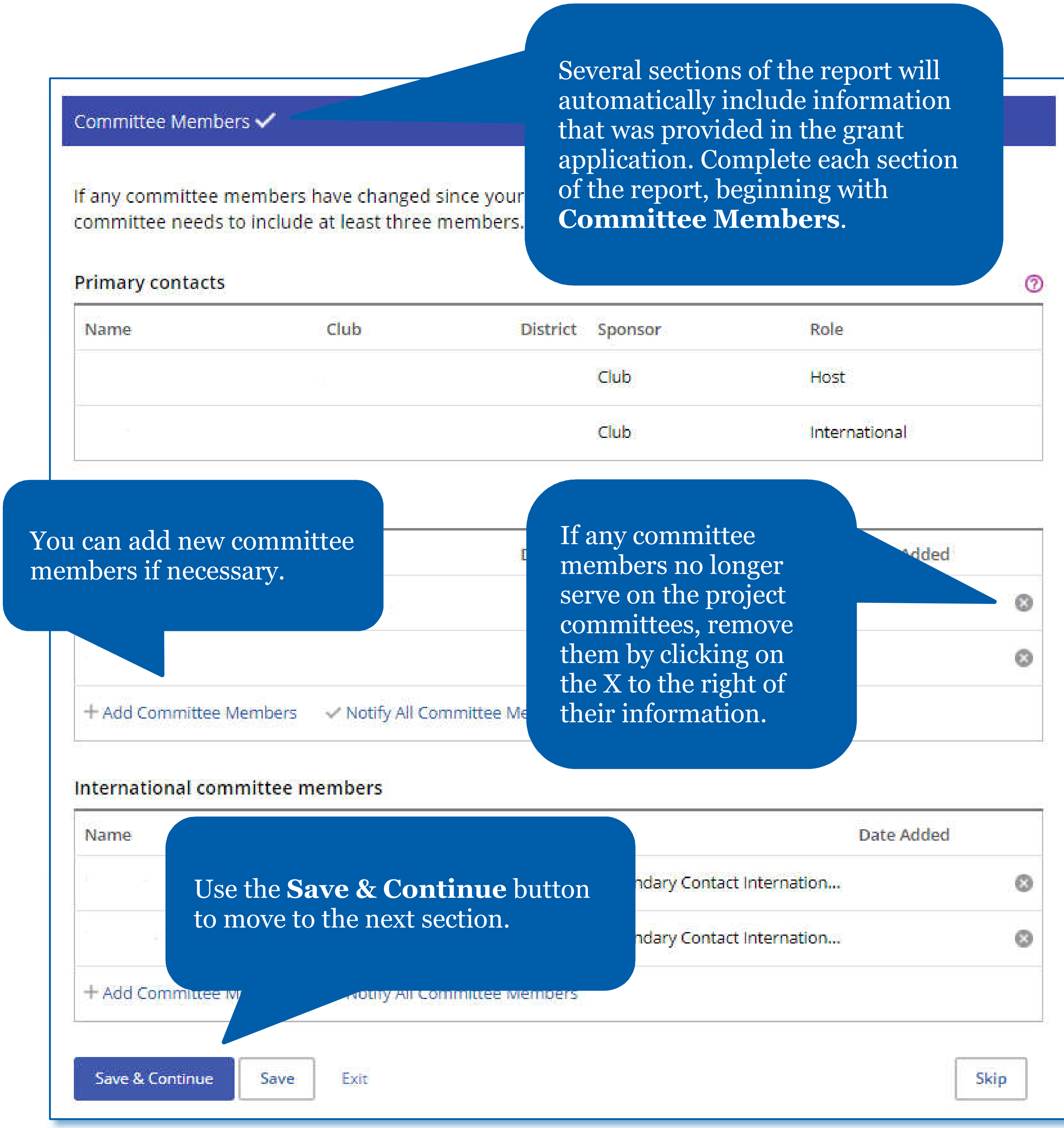
Grant Number	Grant Title	Date Approved	Status	Report Due	
GG1416944	Eldo Eye Centre Clinic	26/03/2015	Paid	28/05/2016	Reports
GG1419525	T.A.R.A. - Tenwek Medical Proj...	06/04/2016	Paid	11/05/2017	Reports
GG1641361	Cervical Cancer Prevention an...	30/09/2016	Paid	24/10/2017	Reports

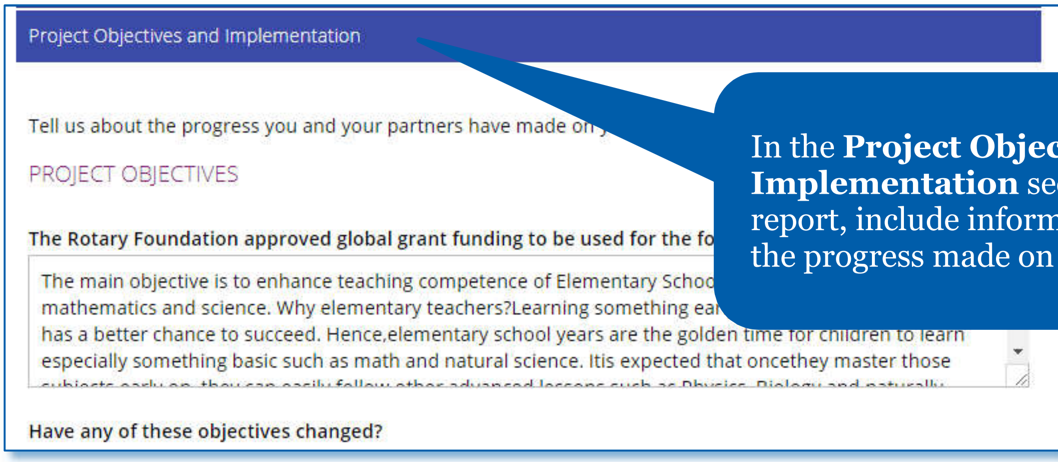
When you find the grant, click **Reports**.


GG1743926 Reports
Teachers' Training Program 2B
Click **Start a Report**.
If you have already started a report, choose **Edit** to continue your work on it.
Reports
No. Type Status Due Submitted
1 Progress Draft 28/06/2018 Edit | Print
Start a Report
Please note: You can only work on one active report at a time.

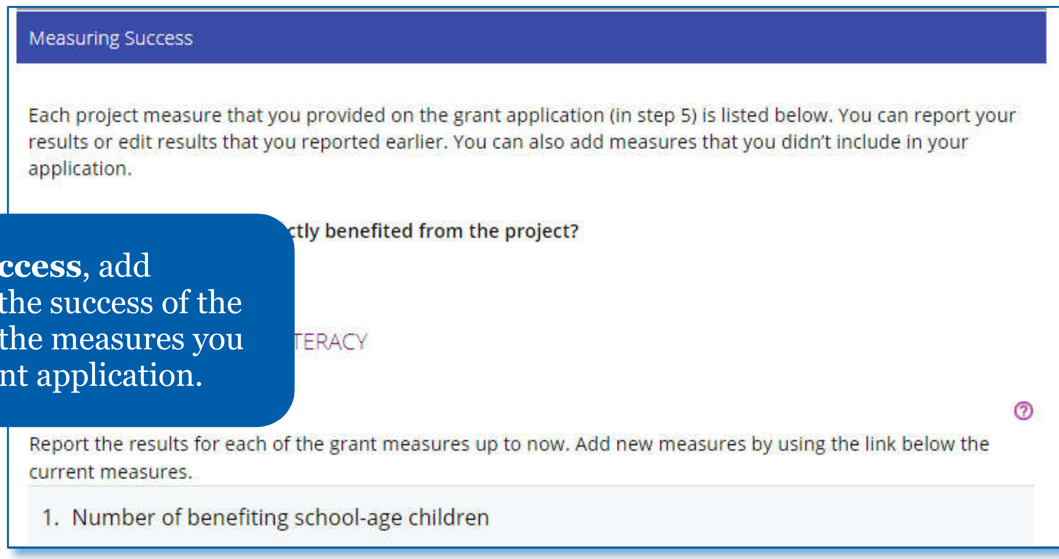

Select Report Type
To begin, select the report type.
PROGRESS REPORT
Use a progress report if the project is still in progress.
Continue
FINAL REPORT
Continue
Choose **Progress Report** if the project is still in progress. Choose **Final Report** when all project activities are finished. Click **Continue**.


GG1743926 Reports
Teachers' Training Program 2B
Progress report
Select **Change Report Type** if you need to change the report from a progress to a final report, or vice versa.
If your activities are completed, switch to a final report. Change Report Type


Several sections of the report will automatically include information that was provided in the grant application. Complete each section of the report, beginning with **Committee Members**.
Committee Members
If any committee members have changed since your
committee needs to include at least three members.
Primary contacts
Name
Club
District
Sponsor
Role
Club
Host
Club
International
You can add new committee members if necessary.
If any committee members no longer serve on the project committees, remove them by clicking on the X to the right of their information.
+ Add Committee Members
Notify All Committee Me
International committee members
Name
Date Added
Use the **Save & Continue** button to move to the next section.
Save & Continue
Save
Exit
Skip

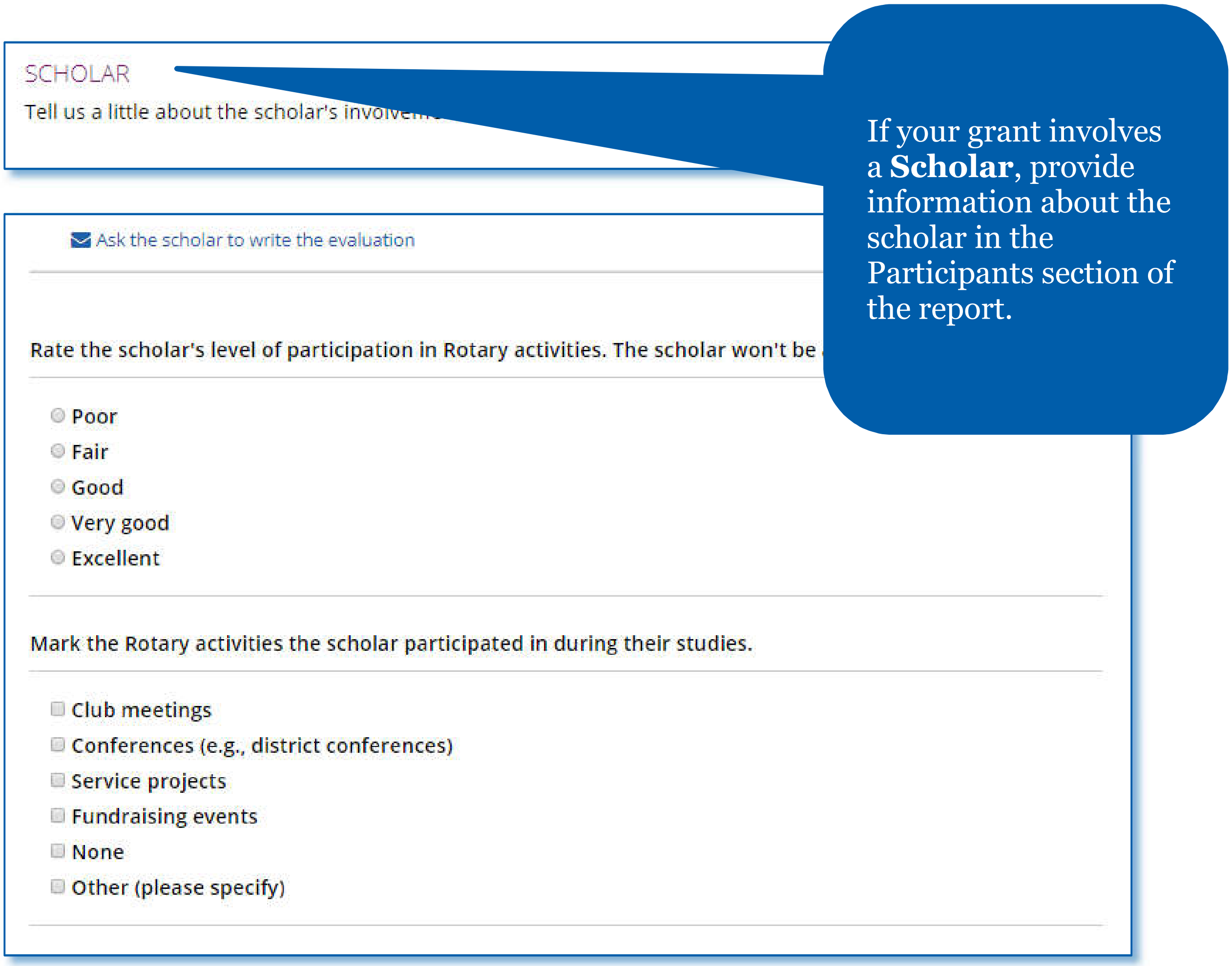


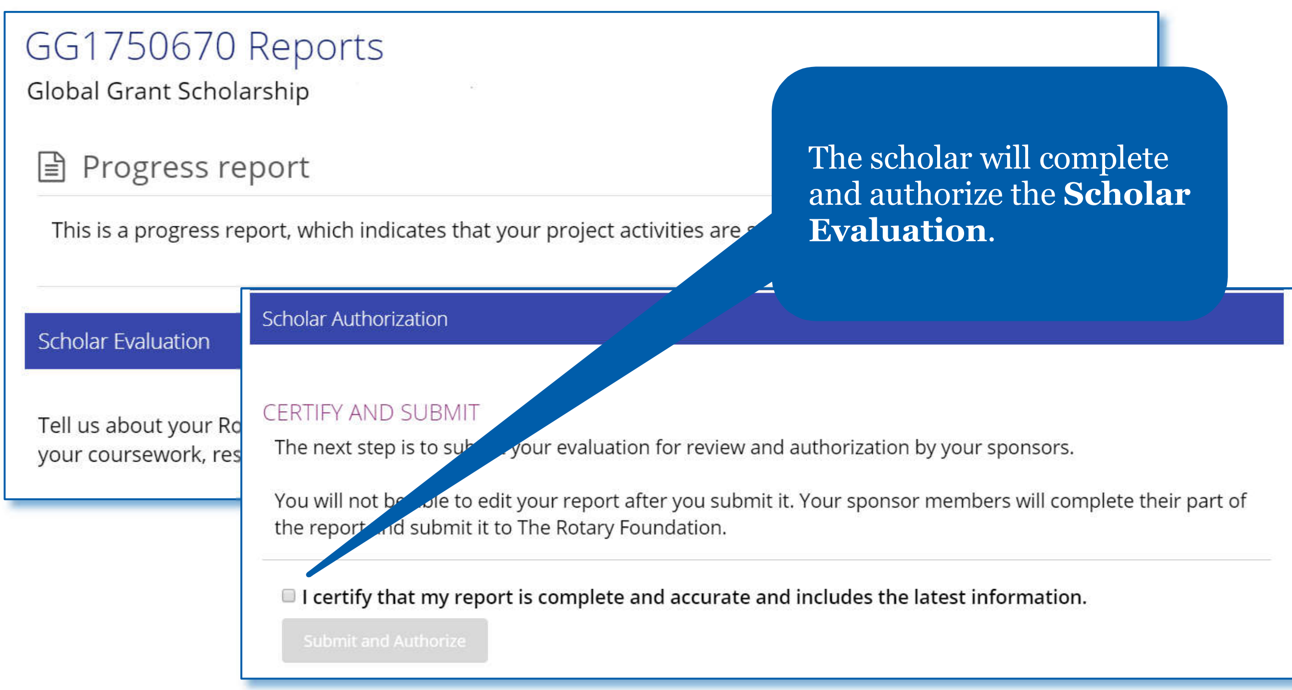
In the **Project Objectives and Implementation** section of the report, include information about the progress made on the project.



In **Measuring Success**, add information about the success of the project in terms of the measures you provided in the grant application.

In the **Participants** section, describe how the sponsor Rotarians have participated in the project. Also enter any other clubs or districts that have helped with the project. If any cooperating organizations are involved in the project, provide details about their activities.


SCHOLAR
Tell us a little about the scholar's involve
If your grant involves a **Scholar**, provide information about the scholar in the Participants section of the report.
Ask the scholar to write the evaluation
Rate the scholar's level of participation in Rotary activities. The scholar won't be
Poor
Fair
Good
Very good
Excellent
Mark the Rotary activities the scholar participated in during their studies.
Club meetings
Conferences (e.g., district conferences)
Service projects
Fundraising events
None
Other (please specify)

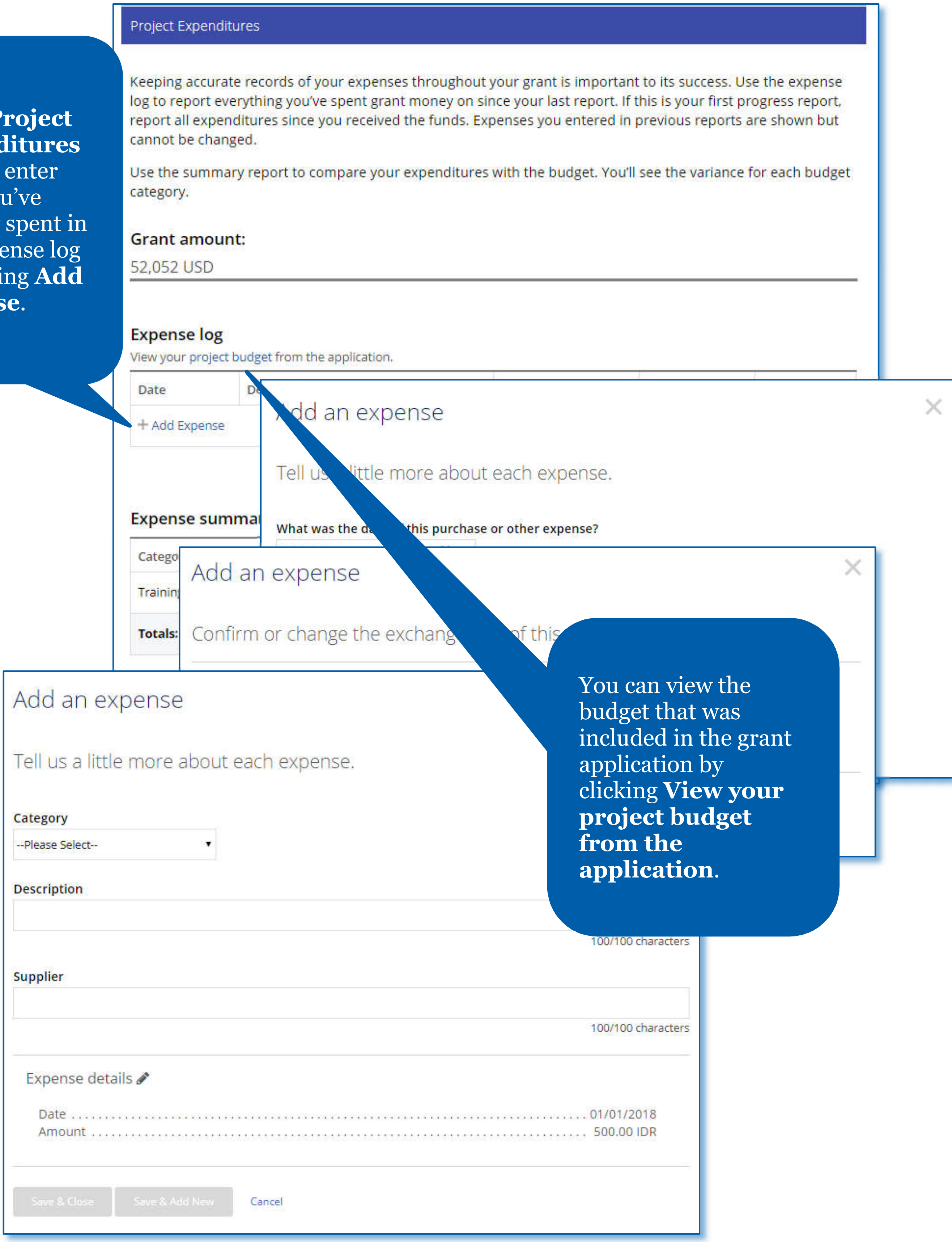

GG1750670 Reports
Global Grant Scholarship
Progress report
This is a progress report, which indicates that your project activities are
The scholar will complete and authorize the **Scholar Evaluation**.
Scholar Evaluation
Tell us about your Ro
your coursework, res
Scholar Authorization
CERTIFY AND SUBMIT
The next step is to su your evaluation for review and authorization by your sponsors.
You will not be ble to edit your report after you submit it. Your sponsor members will complete their part of the report nd submit it to The Rotary Foundation.
I certify that my report is complete and accurate and includes the latest information.
Submit and Authorize

If your project includes a vocational training team, the **Vocational Training Teams** section of the report will be visible. The vocational training team leader should complete this section.

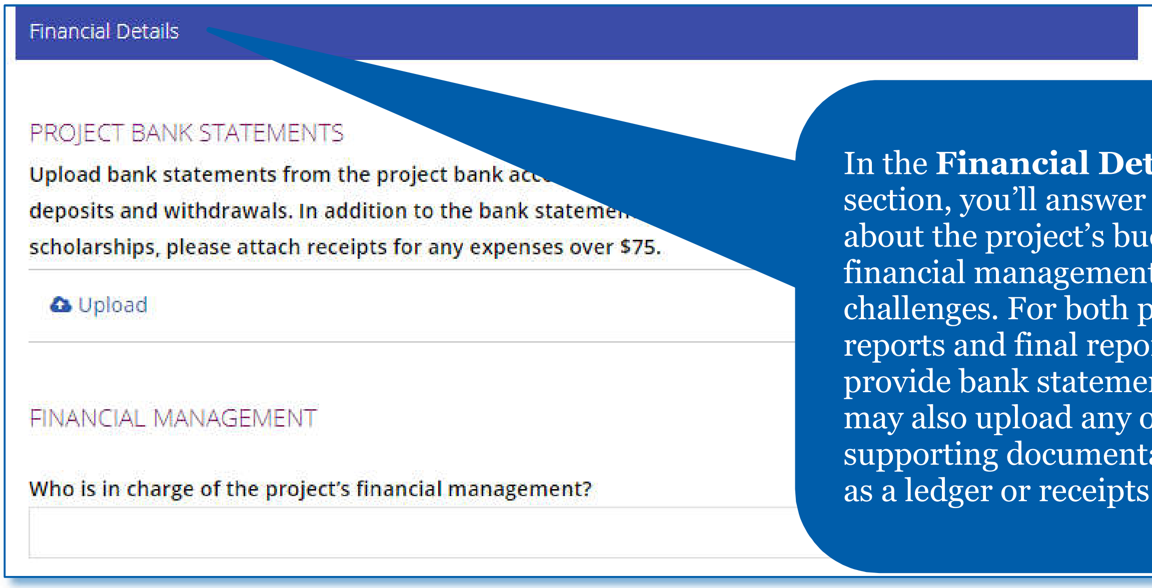
If the team has traveled, select **Yes**, and more questions will be displayed. The team leader will answer these questions and authorize the section.

If multiple teams are involved in the grant, the leader of each team will need to complete and authorize their team's section of the report.

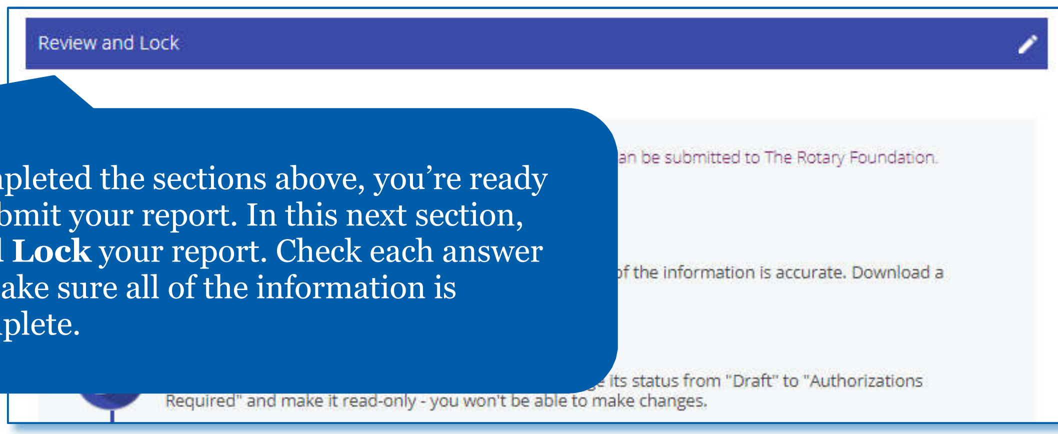
In the **Project Expenditures** section, enter what you've actually spent in the Expense log by clicking **Add Expense**.



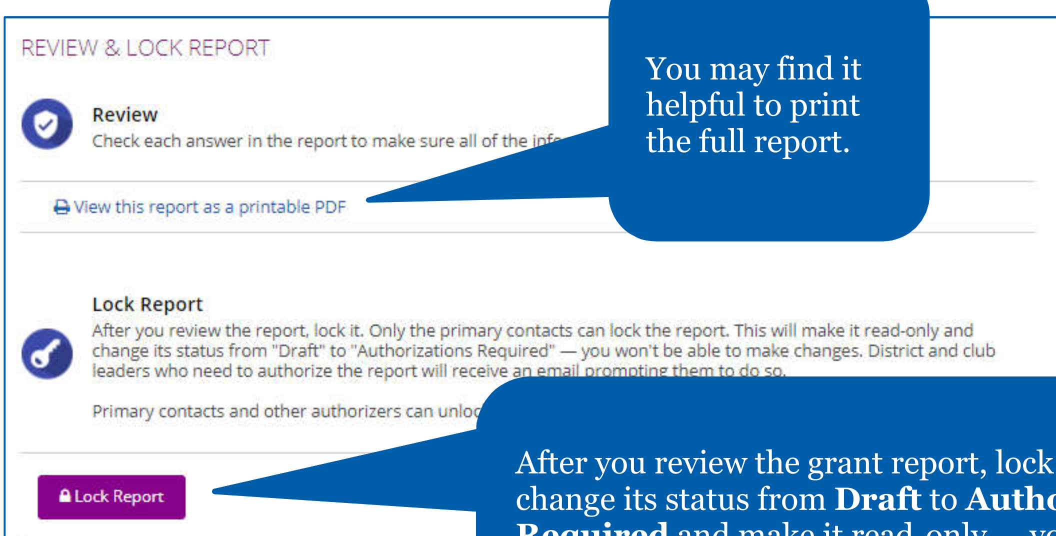
You can view the budget that was included in the grant application by clicking **View your project budget from the application**.



In the **Financial Details** section, you'll answer questions about the project's budget, financial management, and challenges. For both progress reports and final reports, provide bank statements. You may also upload any other supporting documentation, such as a ledger or receipts.

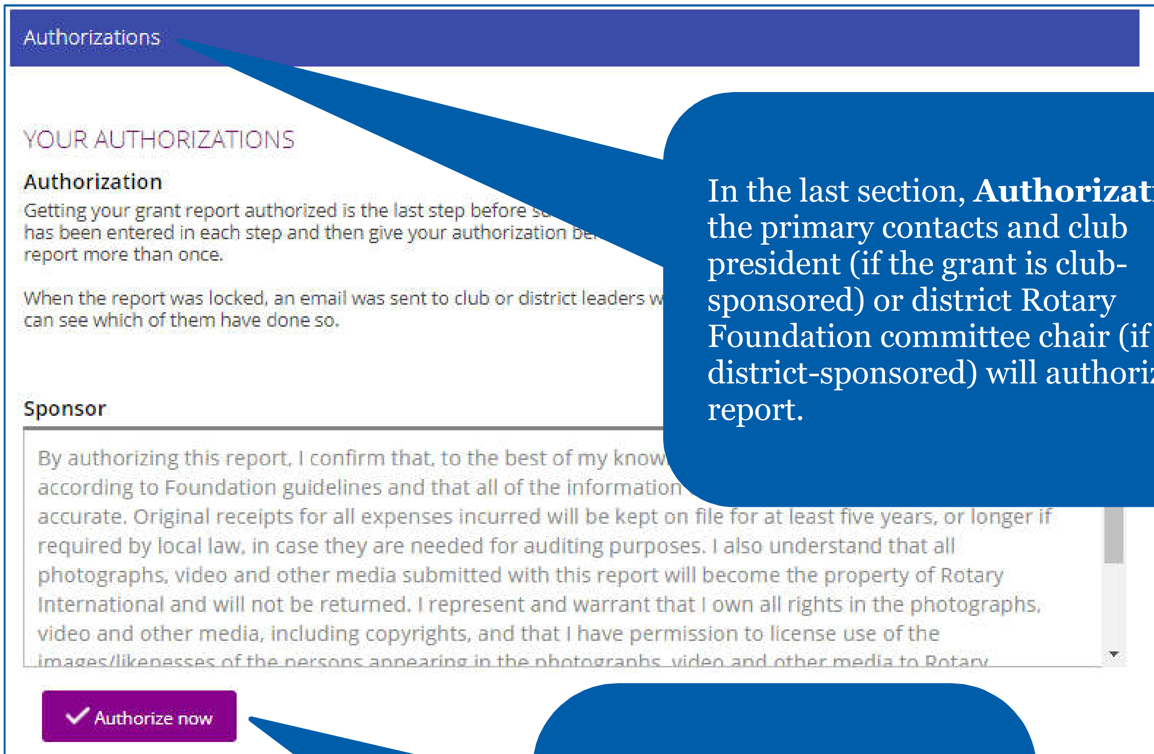


When you've completed the sections above, you're ready to finalize and submit your report. In this next section, you **Review and Lock** your report. Check each answer you've given to make sure all of the information is accurate and complete.



You may find it helpful to print the full report.

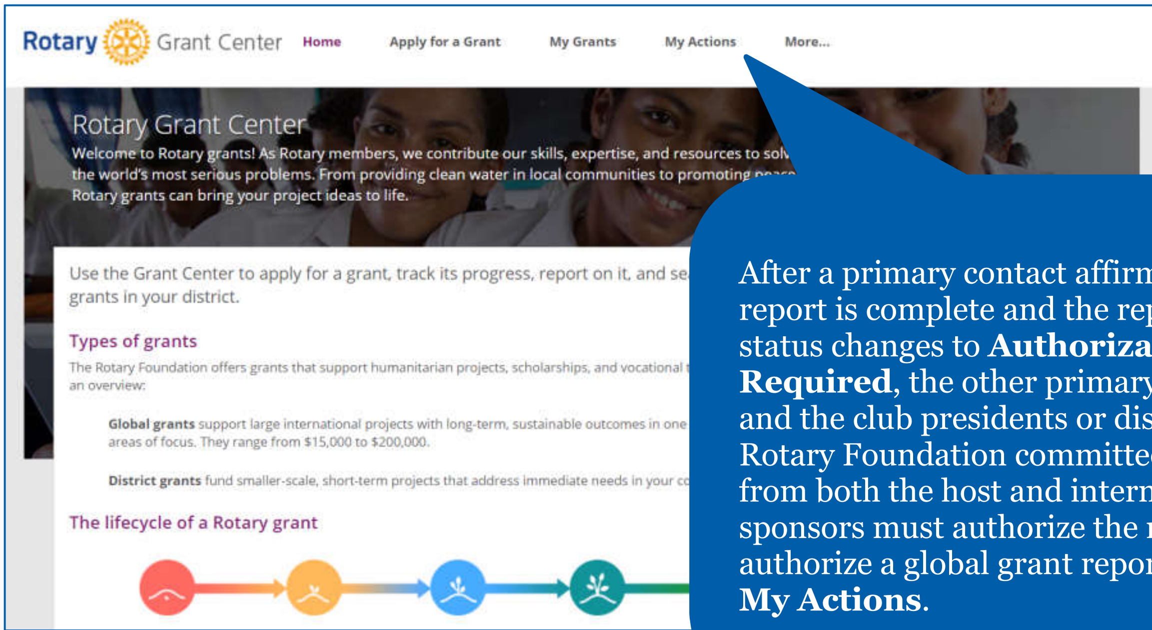
After you review the grant report, lock it. This will change its status from **Draft** to **Authorizations Required** and make it read-only — you won't be able to make changes. Only the primary contacts can lock the report.



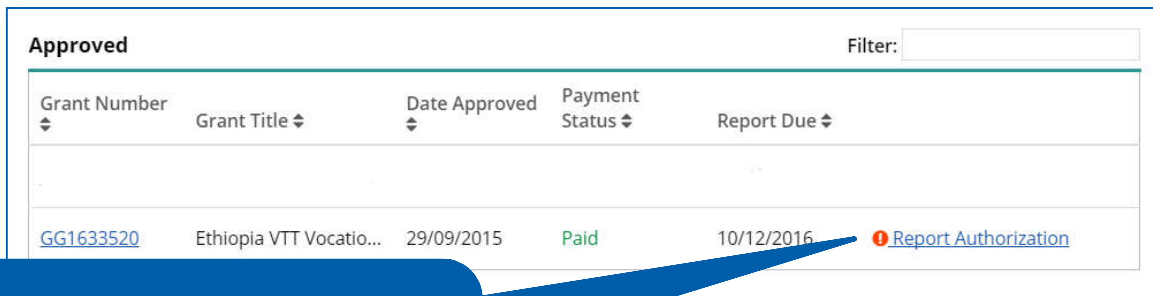
In the last section, **Authorizations**, the primary contacts and club president (if the grant is club-sponsored) or district Rotary Foundation committee chair (if it is district-sponsored) will authorize the report.

Review the authorization information, then click **Authorize now**. As soon as everyone who needs to authorize the report does so, the report is submitted to The Rotary Foundation for review. After your report is submitted, you cannot change it without contacting Rotary staff.

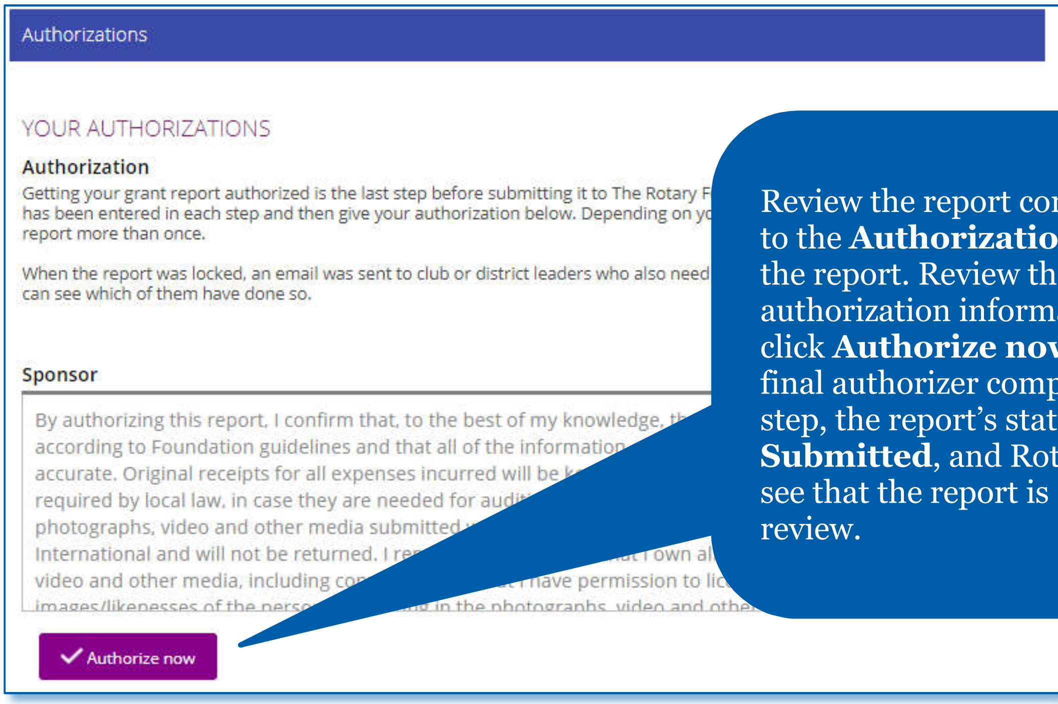
Authorize a Global Grant Report



After a primary contact affirms that the report is complete and the report's status changes to **Authorizations Required**, the other primary contact and the club presidents or district Rotary Foundation committee chairs from both the host and international sponsors must authorize the report. To authorize a global grant report, go to **My Actions**.

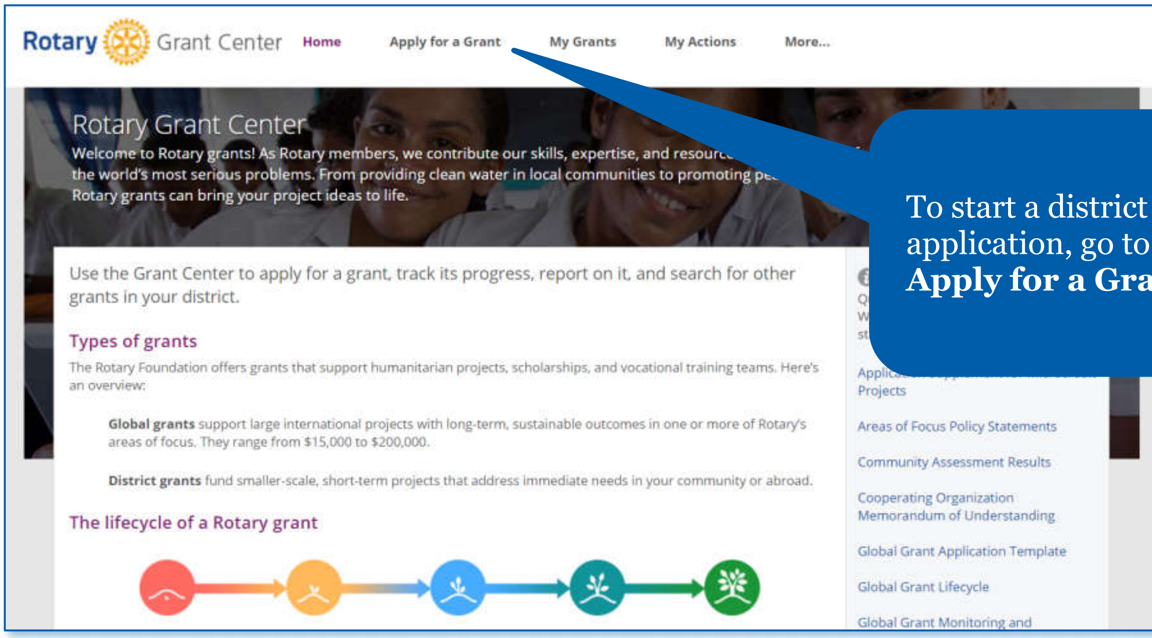


Go to the **Approved** grants section of the page. When you find the grant, click **Report Authorization**. Then click **Open.**



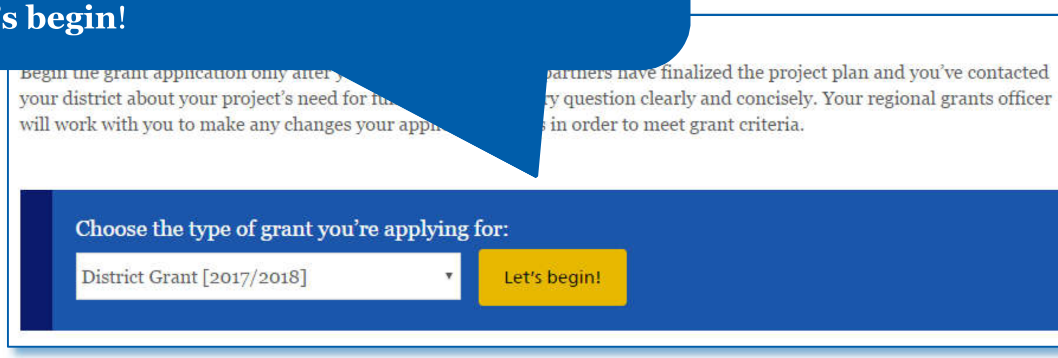
Review the report content, then go to the **Authorizations** section of the report. Review the authorization information, and click **Authorize now**. When the final authorizer completes this step, the report's status changes to **Submitted**, and Rotary staff will see that the report is ready for review.

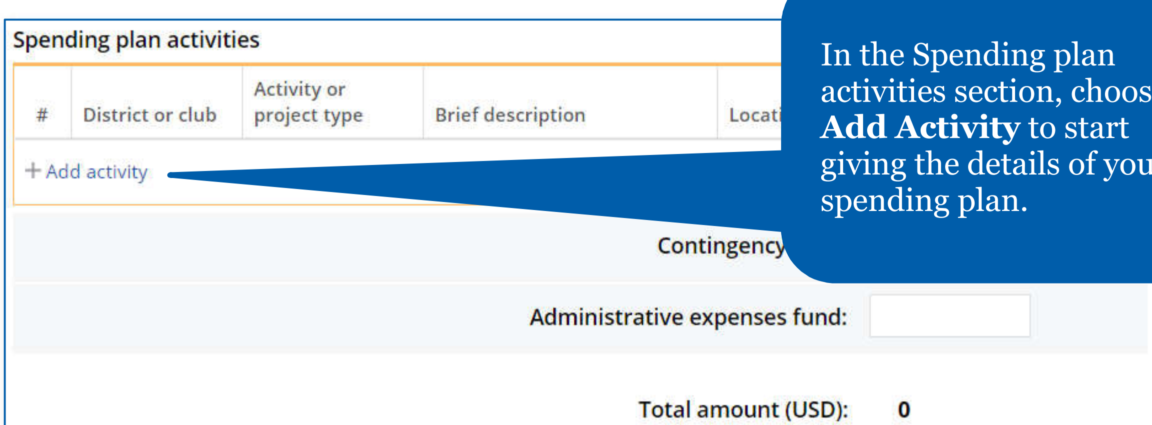
Apply for a District Grant (district leaders only)



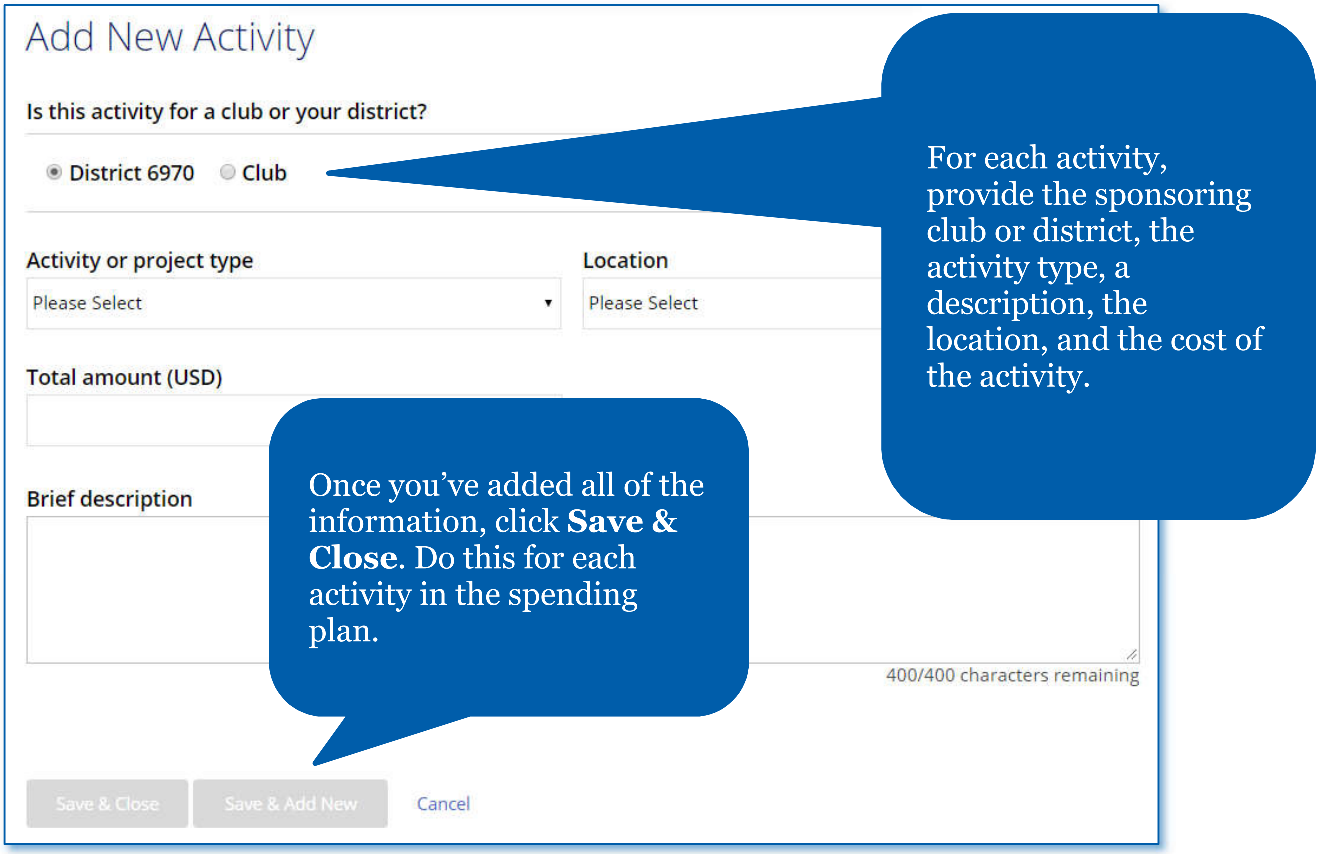
To start a district grant application, go to **Apply for a Grant**.

Only district governors, Rotary Foundation committee chairs and grants subcommittee chairs can apply for a district grant. So under Choose the type of grant you're applying for, the district grant option will be available only to them. Choose District Grant from the list and click **Let's begin**!



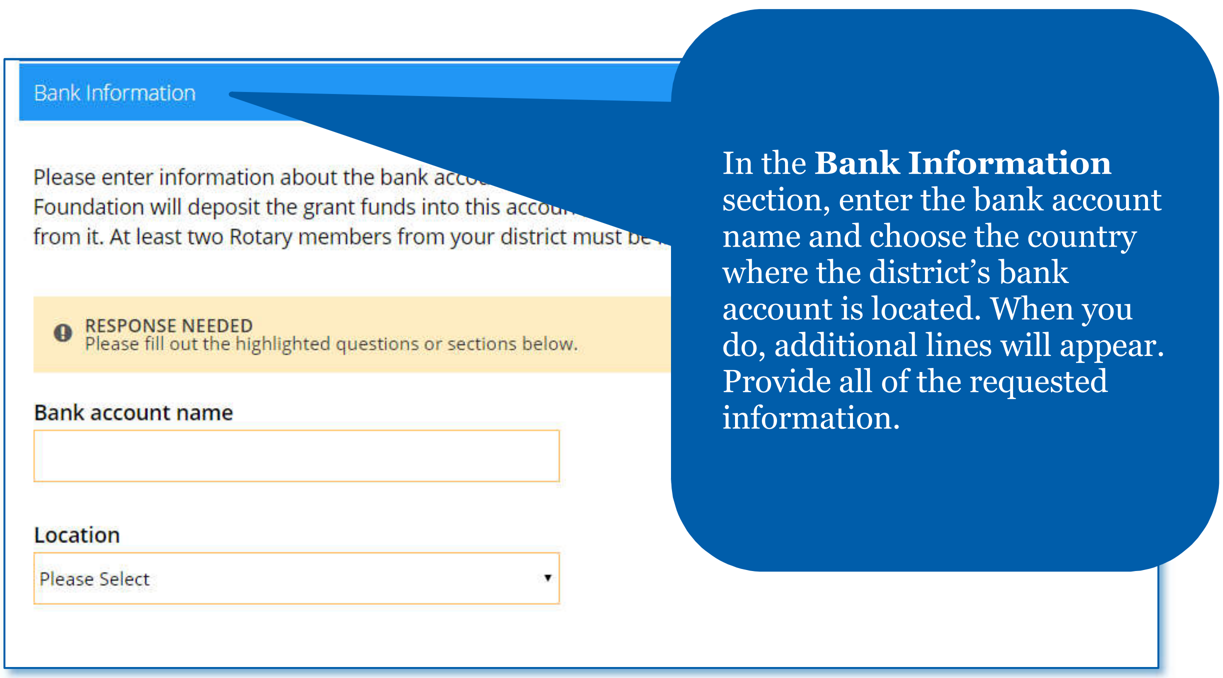


In the Spending plan activities section, choose **Add Activity** to start giving the details of your spending plan.

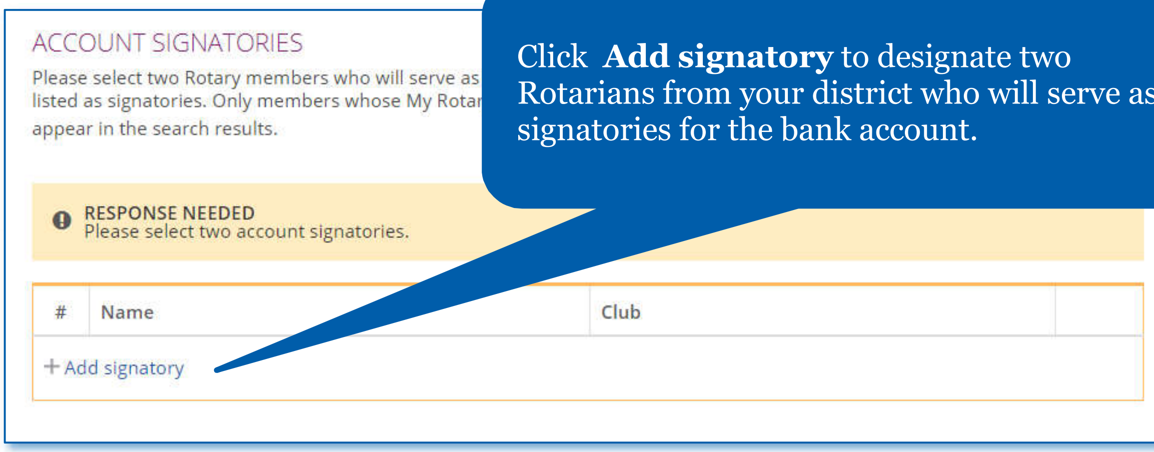


For each activity, provide the sponsoring club or district, the activity type, a description, the location, and the cost of the activity.

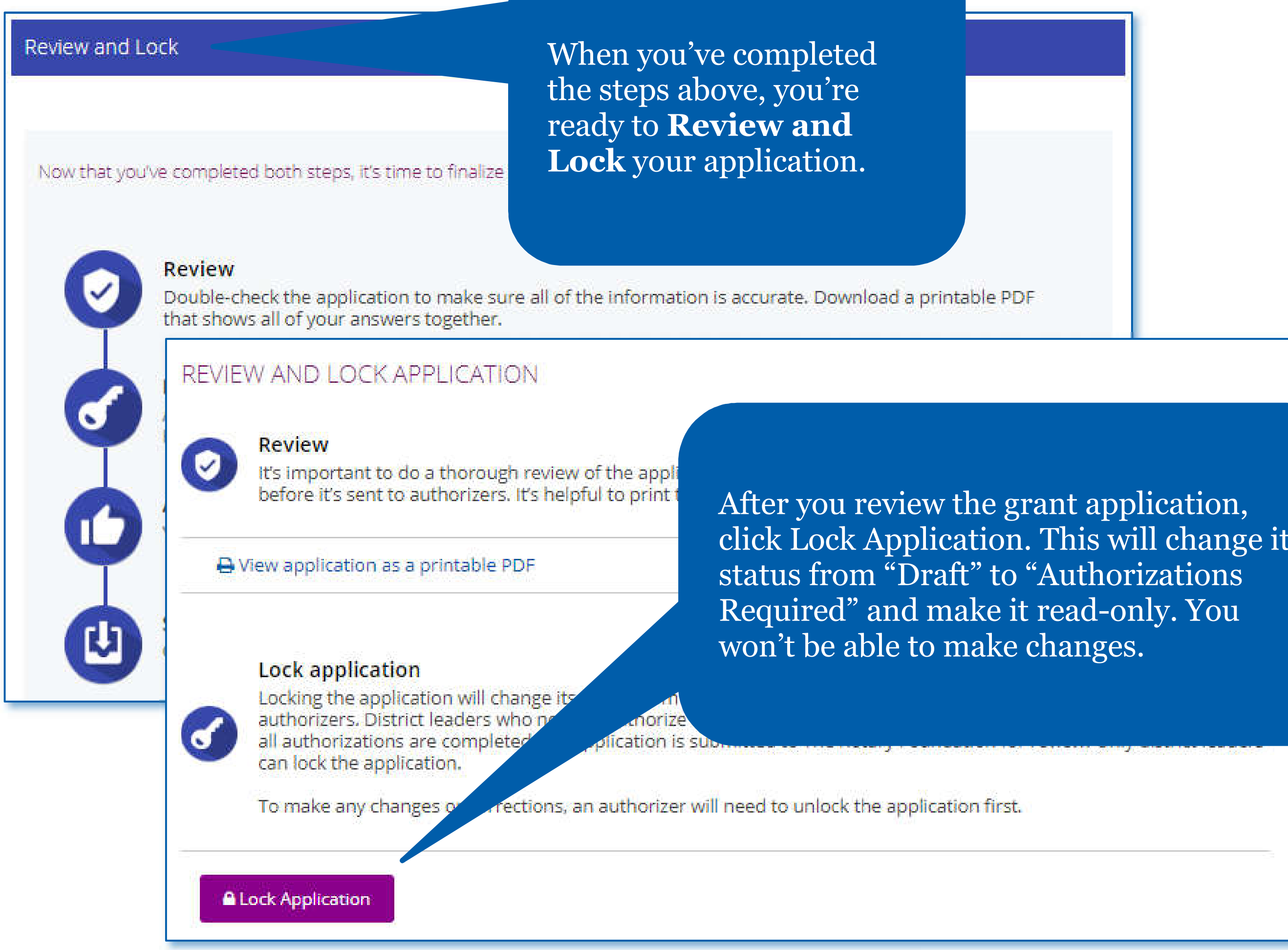
Once you’ve added all of the information, click **Save & Close**. Do this for each activity in the spending plan.



In the **Bank Information** section, enter the bank account name and choose the country where the district’s bank account is located. When you do, additional lines will appear. Provide all of the requested information.

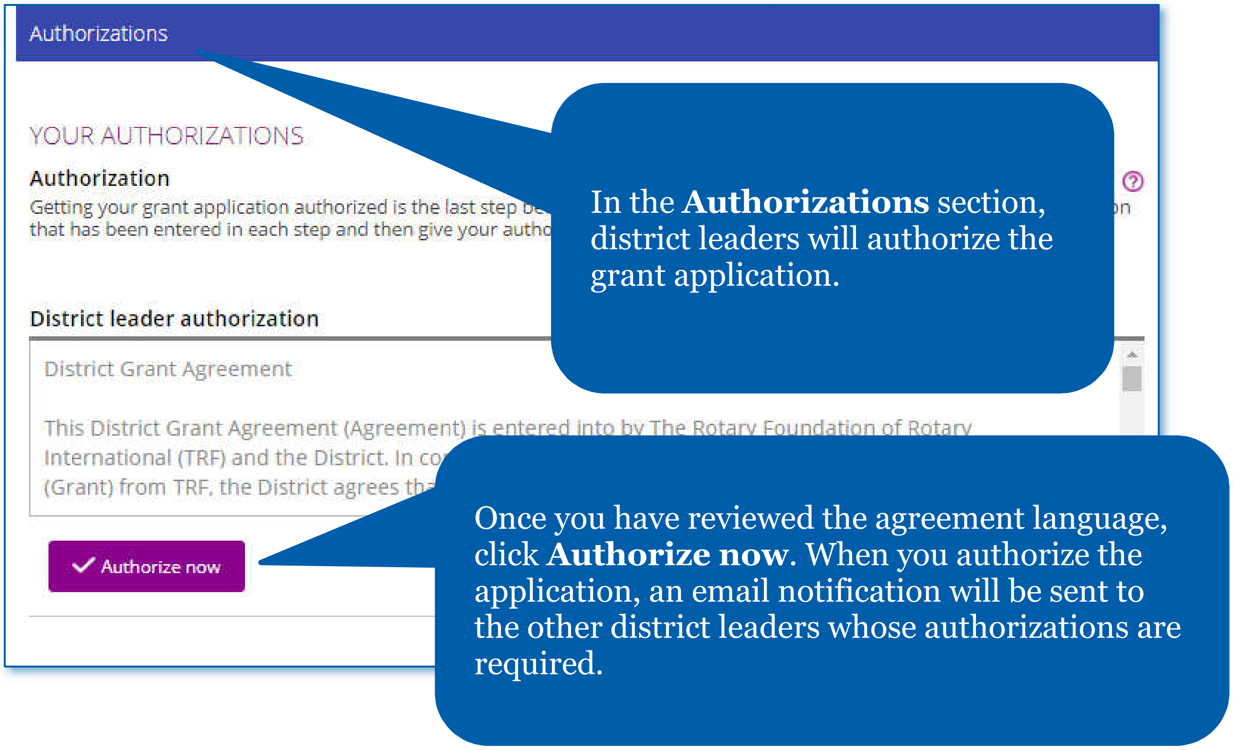


Click **Add signatory** to designate two Rotarians from your district who will serve as signatories for the bank account.

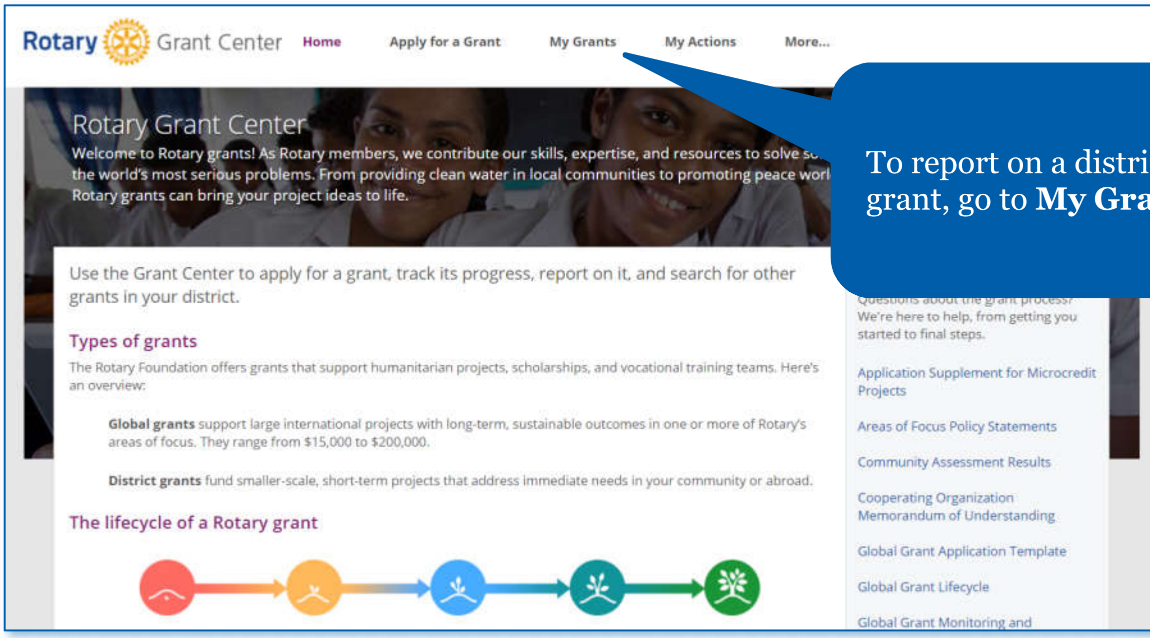


When you've completed the steps above, you're ready to **Review and Lock** your application.

After you review the grant application, click Lock Application. This will change its status from "Draft" to "Authorizations Required" and make it read-only. You won't be able to make changes.

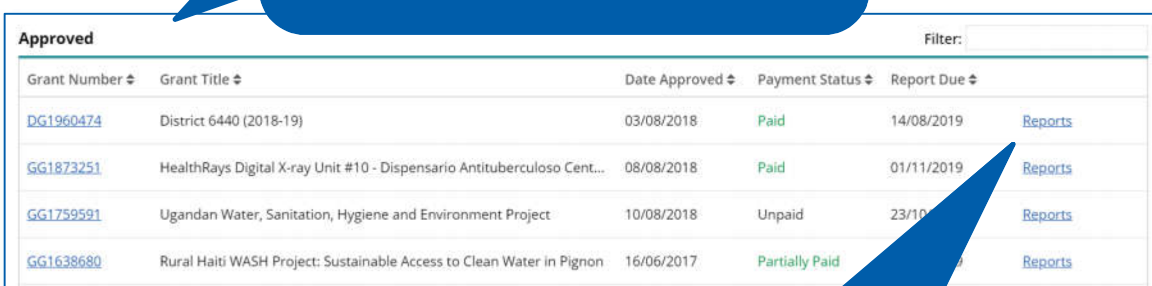

Authorizations
YOUR AUTHORIZATIONS
Authorization
Getting your grant application authorized is the last step be
that has been entered in each step and then give your autho
District leader authorization
District Grant Agreement
This District Grant Agreement (Agreement) is entered into by The Rotary Foundation of Rotary
International (TRF) and the District. In co
(Grant) from TRF, the District agrees tha
Authorize now
In the **Authorizations** section, district leaders will authorize the grant application.
Once you have reviewed the agreement language, click **Authorize now**. When you authorize the application, an email notification will be sent to the other district leaders whose authorizations are required.

Report on a District Grant (District Leaders Only)



To report on a district grant, go to **My Grants**.

Go to the **Approved** grants section to see all of the approved grants that you're involved in or use **Filter** to search for a grant by number.

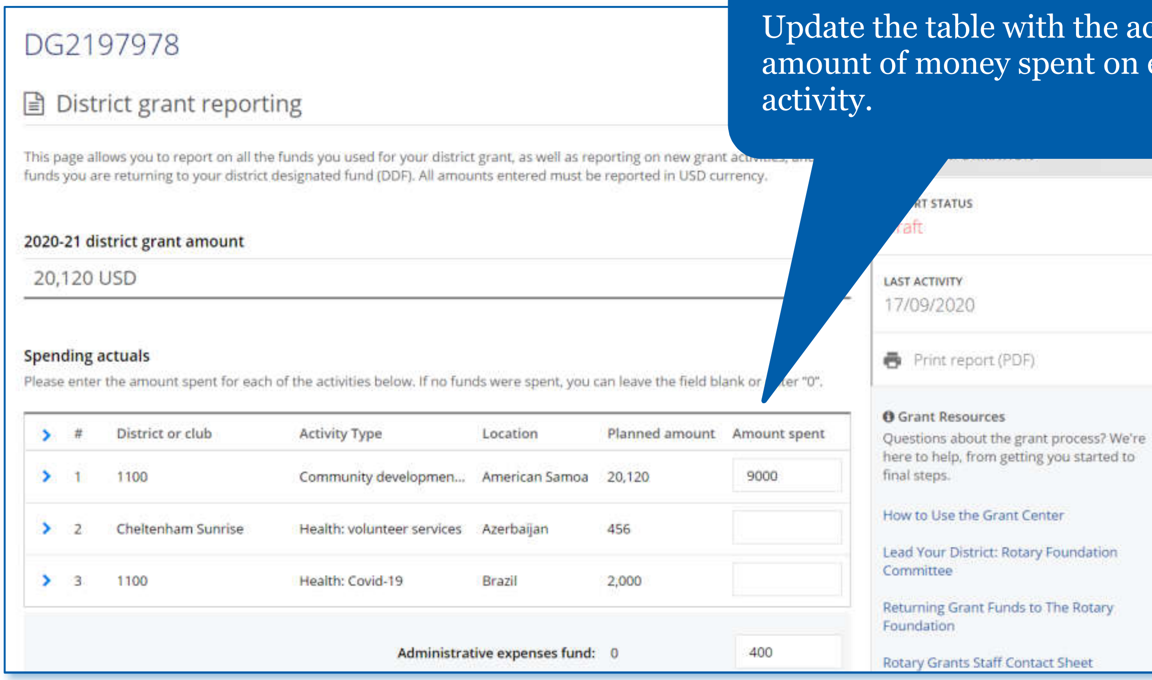

Approved

Filter:

Grant Number	Grant Title	Date Approved	Payment Status	Report Due	
DG1960474	District 6440 (2018-19)	03/08/2018	Paid	14/08/2019	Reports
GG1873251	HealthRays Digital X-ray Unit #10 - Dispensario Antituberculoso Cent...	08/08/2018	Paid	01/11/2019	Reports
GG1759591	Ugandan Water, Sanitation, Hygiene and Environment Project	10/08/2018	Unpaid	23/10	Reports
GG1638680	Rural Haiti WASH Project: Sustainable Access to Clean Water in Pignon	16/06/2017	Partially Paid		Reports

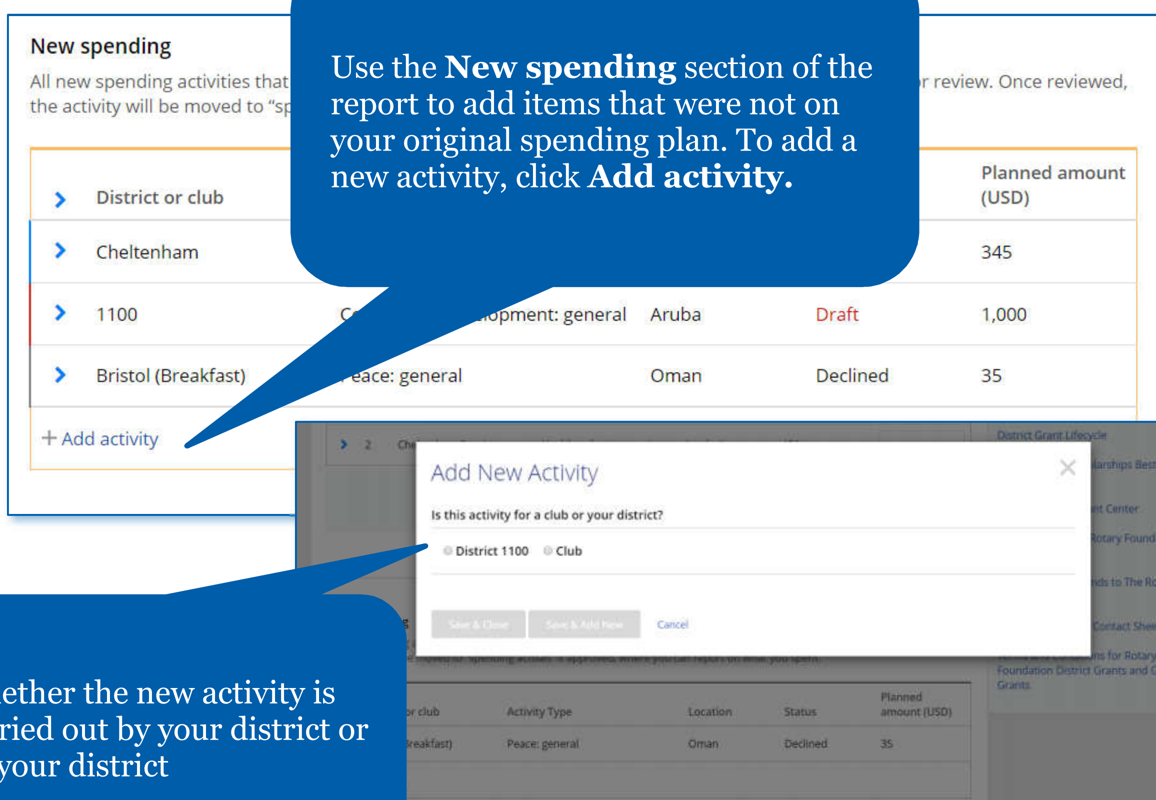
When you find the grant, click on **Reports**.

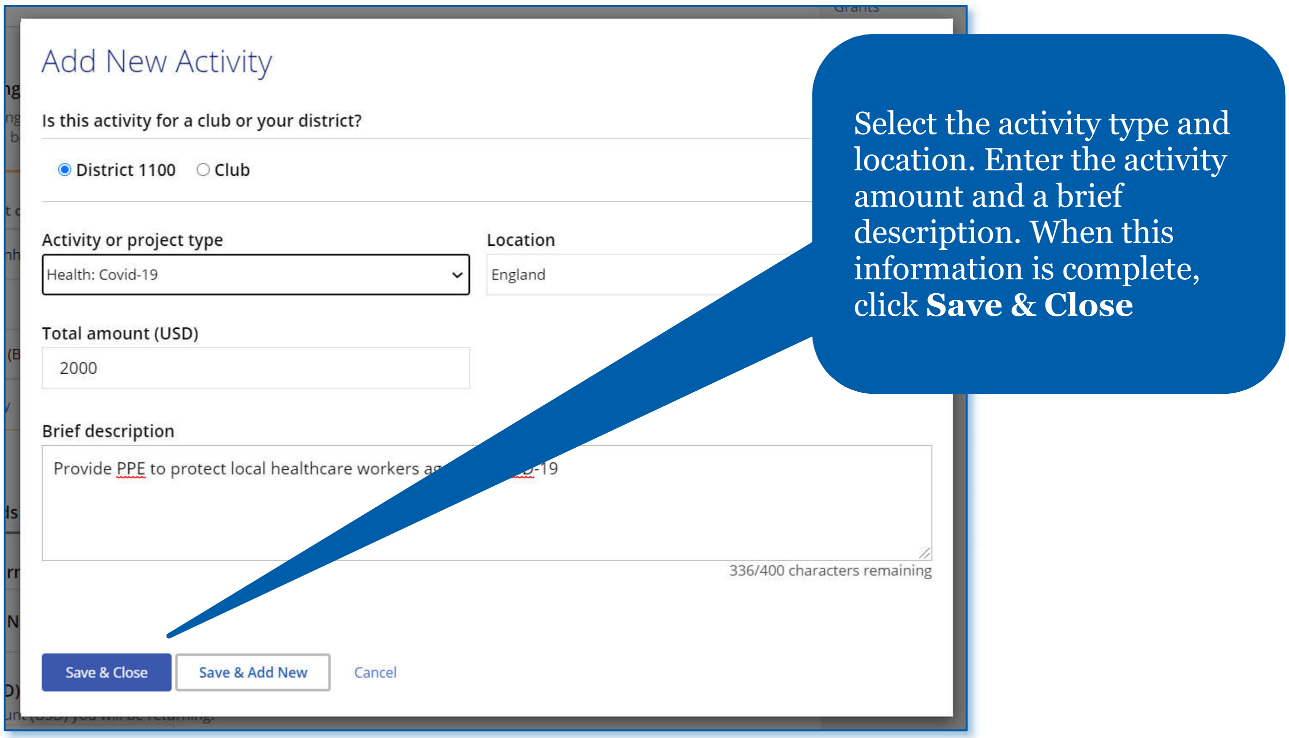
Update the table with the actual amount of money spent on each activity.

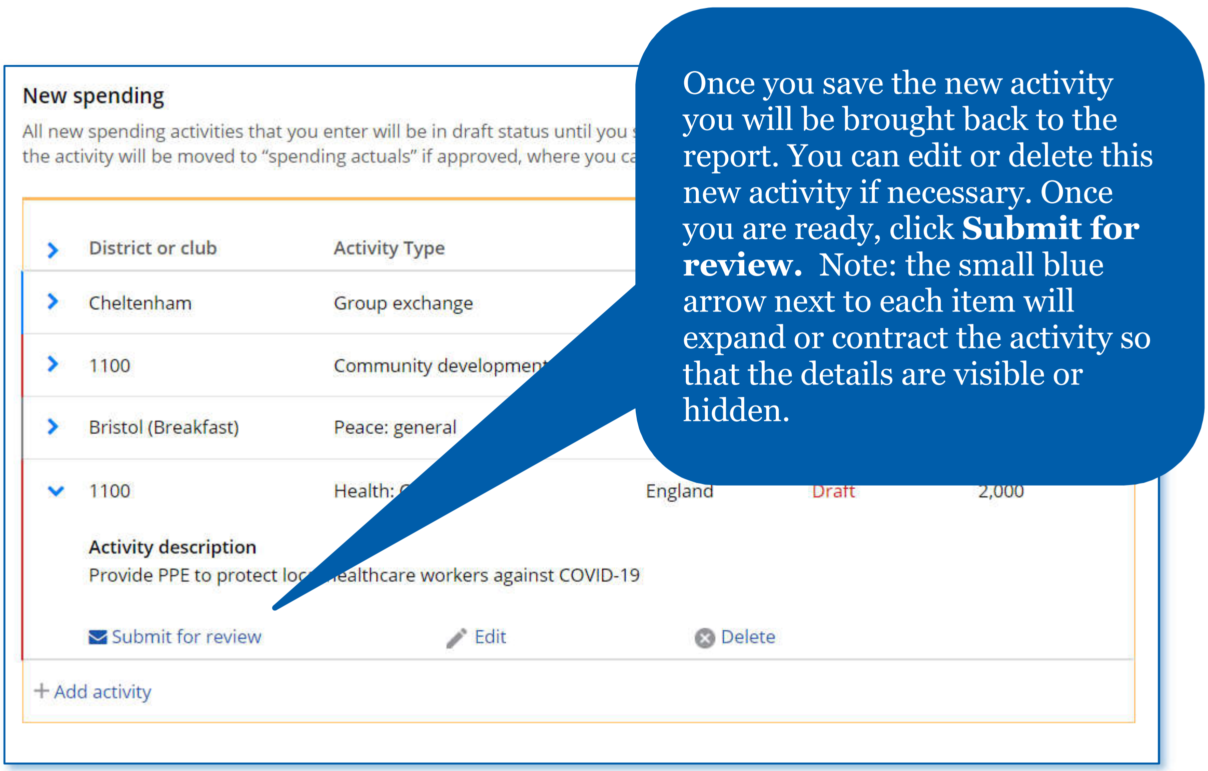


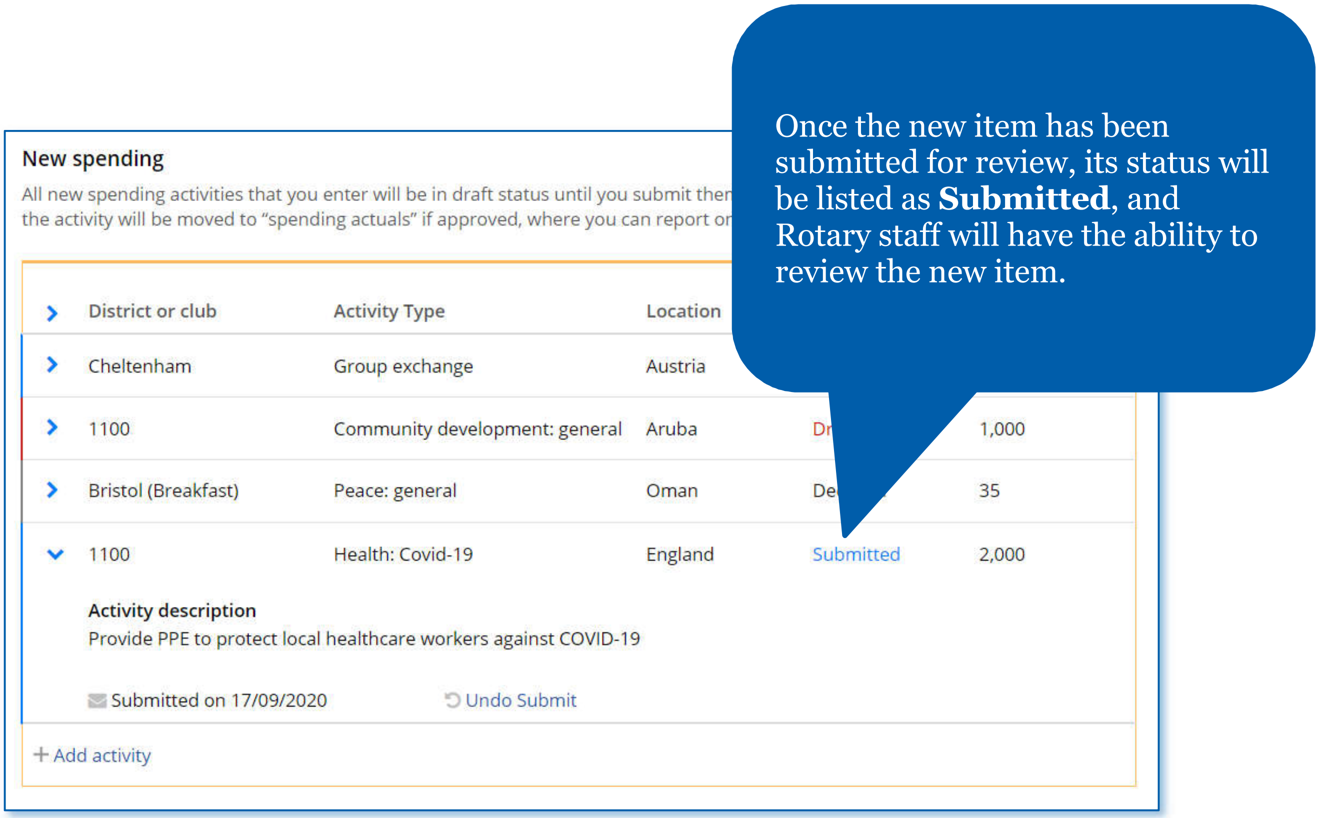
Use the **New spending** section of the report to add items that were not on your original spending plan. To add a new activity, click **Add activity.**

Select whether the new activity is being carried out by your district or a club in your district

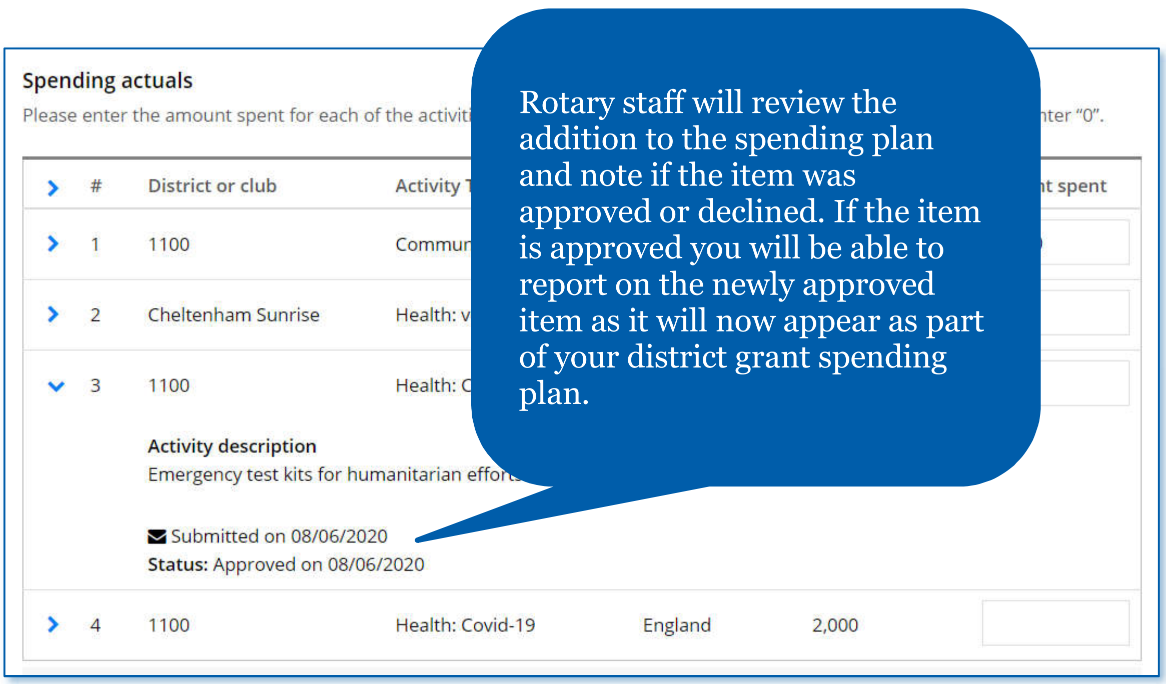



Add New Activity
Is this activity for a club or your district?
District 1100
Club
Activity or project type
Health: Covid-19
Location
England
Total amount (USD)
2000
Brief description
336/400 characters remaining
Save & Close
Save & Add New
Cancel
Select the activity type and location. Enter the activity amount and a brief description. When this information is complete, click **Save & Close**

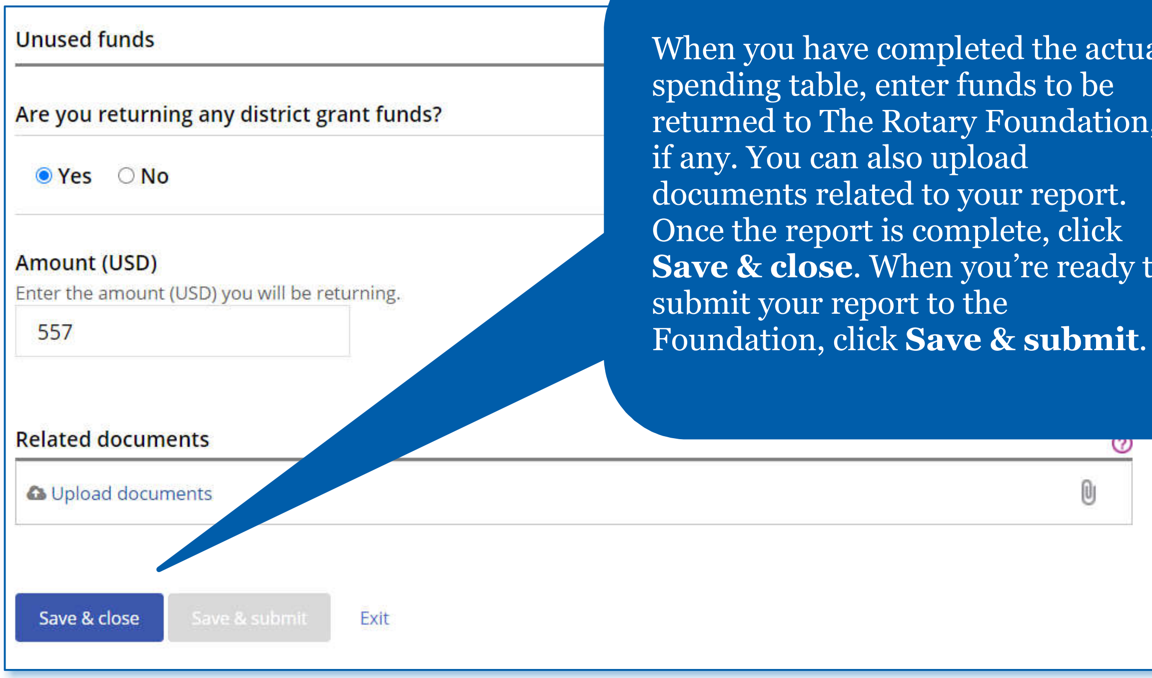

New spending
District or club
Activity Type
Cheltenham
Group exchange
1100
Community development
Bristol (Breakfast)
Peace: general
1100
England
Draft
2,000
Activity description
Submit for review
Edit
Delete
+ Add activity
Once you save the new activity you will be brought back to the report. You can edit or delete this new activity if necessary. Once you are ready, click **Submit for review.** Note: the small blue arrow next to each item will expand or contract the activity so that the details are visible or hidden.



Once the new item has been submitted for review, its status will be listed as **Submitted**, and Rotary staff will have the ability to review the new item.



Rotary staff will review the addition to the spending plan and note if the item was approved or declined. If the item is approved you will be able to report on the newly approved item as it will now appear as part of your district grant spending plan.



When you have completed the actual spending table, enter funds to be returned to The Rotary Foundation, if any. You can also upload documents related to your report. Once the report is complete, click **Save & close**. When you're ready to submit your report to the Foundation, click **Save & submit**.