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:

- Navigate the Grant Center
- Apply for a Global Grant
- Authorize a Global Grant Application (Club Presidents and District Leaders)
- Enter Global Grant Bank Account Information
- Report on a Global Grant
- Authorize a Global Grant Report
- Apply for a District Grant (District Leaders Only)
- Report on a District Grant (District Leaders Only)

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

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

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

Choose Global Grant from the list and click Let’s begin!
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**.

![Project Overview](image1)

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

![Areas of Focus](image2)
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.

![Image of Step 5: Measuring Success](image1)

In **step 6**, add the **Location and Dates** of the project. For scholarships and vocational training teams, add the estimated travel dates.

![Image of Step 6: Location and Dates](image2)
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** asks about your project Budget. Enter the local currency and exchange rate, list budget items, and upload supporting documents.
In step 9, list your sources of project Funding.
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.
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 approved, primary contacts provide information about the project bank account so that the Foundation can deposit the grant money. To enter bank account information, go to My Actions.

Go to the Approved grants. You can use Filter to search for a grant by number. When you find the grant, click Bank Information.
Select the account holder from the list and then select the location of the bank account. Click **Add Signatory** to designate two Rotarians to serve as signatories for the bank account. When you’ve provided all of the information, click **Submit Bank Information**.
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. When you find the grant, click Reports.
Click **Start a Report**.

If you have already started a report, choose **Edit** to continue your work on it.
Choose **Progress Report** if the project is still in progress. Choose **Final Report** when all project activities are finished. Click **Continue**.

Select **Change Report Type** if you need to change the report from a progress to a final report, or vice versa.
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**. If any committee members no longer serve on the project committees, remove them by clicking on the **X** to the right of their information. You can add new committee members if necessary. Use the **Save & Continue** button to move to the next section.
In the **Project Objectives and Implementation** section of the report, include information about the progress made on the project.

**PROJECT OBJECTIVES**

The Rotary Foundation approved global grant funding to be used for the following project objectives:

The main objective is to enhance teaching competence of Elementary School Teachers, especially in mathematics and science. Why elementary teachers? Learning something early on when we are still fresh has a better chance to succeed. Hence elementary school years are the golden time for children to learn something basic such as math and natural science. It's expected that once they master those subjects early on, they can easily follow other advanced courses such as Physics, Biology, and actually.

Have any of these objectives changed?

- **Yes**  
- **No**

Have you made progress toward your project objectives?

---

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

**Impact measures**

Report the results for each of the grant measures up to now. Add new measures by using the link below the current measures.

1. **Number of benefiting school-age children**

<table>
<thead>
<tr>
<th>Collection method</th>
<th>Frequency</th>
<th>Beneficiaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct observation</td>
<td>Every six months</td>
<td>100-499</td>
</tr>
</tbody>
</table>

**RESULTS TO DATE**

---

[Report]
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.

**SPONSOR PARTICIPATION**

What roles and responsibilities did host sponsor members have?

What roles and responsibilities did international sponsor members have?

**PARTNERS (OPTIONAL)**

Add any Rotary clubs or districts that were involved in this project, other than the host and international sponsors or financial contributors.

<table>
<thead>
<tr>
<th>No.</th>
<th>Type</th>
<th>Club name or district number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Add a Club or District*
If your grant involves a scholarship, provide information about the scholar in the **Participants** section of the report.

The scholar will complete and authorize the **Scholar Evaluation**.
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**.

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Expense Log</th>
<th>Add Expense</th>
<th>Expense Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Use the summary report to compare your expenditures with the budget. You’ll see the variance for each budget category.
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.

**PROJECT BANK STATEMENTS**

Upload bank statements from the project bank account to show all project-related transactions, including deposits and withdrawals. In addition to the bank statements, you can also upload a financial ledger. For scholarships, please attach receipts for any expenses over $75.

![Upload button]

**FINANCIAL MANAGEMENT**

Who is in charge of the project’s financial management?

Please describe the project’s financial management, including record keeping, inventory, payment authorizations, and conversion of funds.

Were there any challenges in managing the project funds?

- ☐ Yes  ☐ No
When you’ve completed the sections above, you’re ready to finalize and submit your report. In the 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** tab, 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**. Do this for each activity in the spending plan.
In the **Bank Account** tab, choose the country where the district’s bank account is located. When you do, additional lines will appear. Provide all of the requested information.

```
| Location of the bank account: | United States ▼ |
| Payment currency:             | USD ▼ |
| Payment method:               | Automated Clearing House (ACH) ▼ |
| Pay to:                       | District ▼ |
| Bank account name:            | |
| Bank account number:          | |
| Account type:                 | ▼ |
| ABA routing number:           | |
```

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

```
| Bank address (line 1): |
| Bank address (line 2): |
| Bank address (line 3): |
| Bank city:             |
| Bank state:            |
| Bank postal:           |
```

Identify two Rotarians from your district who will serve as the signatories for this account. These individuals will receive an email notification that they have been added as bank account signatories for this grant. Rotarians who do not have a valid email address on file in Rotary’s membership records will not appear in search results.
Provide information about both bank account signatories. You can search for their names by entering their clubs’ names and clicking **Search**.

In the **Authorizations** tab, accept the terms of the grant agreement and authorize the grant application. A red error message will appear if any information is missing or incorrect.
Check the box to authorize the application, and click **Save & Exit.** When you authorize the application, an email notification will be sent to the other district leaders whose authorizations are required.

By clicking this box, I affirm that I am an authorized representative and have the authority to act on behalf of the Rotary District to which I belong. I further affirm that I have read and agree to this Agreement, including the Terms and Conditions for Rotary Foundation District Grants and Global Grants.

**Authorization not permitted until the items listed at the top of this page have been completed.**
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. When you find the grant, click on the **Grant Number**.
Click on **Report**, and update the table with the actual amount of money distributed to each activity.

![District Grant Application]

<table>
<thead>
<tr>
<th>No.</th>
<th>District/Club</th>
<th>Activity type: general</th>
<th>Activity description</th>
<th>Activity location</th>
<th>Planned Distributed amount (USD)</th>
<th>Distributed amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:</td>
<td>Antioch</td>
<td>Community development</td>
<td>Holiday Food Basket program which provides 150 families with holiday meals</td>
<td>United States</td>
<td>2500</td>
<td>0</td>
</tr>
<tr>
<td>2:</td>
<td>Arlington Heights</td>
<td>Education: scholarship</td>
<td>Club provides 7 $1000 scholarships to college bound students to cover the cost of books</td>
<td>United States</td>
<td>3166</td>
<td>0</td>
</tr>
<tr>
<td>3:</td>
<td>Arlington Heights</td>
<td>Community development</td>
<td>Purchase, selection and delivery of perishable food for the Wheeling Township Food Pantry</td>
<td>United States</td>
<td>1000</td>
<td>0</td>
</tr>
<tr>
<td>4:</td>
<td>Barrington</td>
<td>Community development</td>
<td>Holiday gift basket program where club members shop, wrap and deliver presents for needy families.</td>
<td>United States</td>
<td>1500</td>
<td>0</td>
</tr>
</tbody>
</table>

Click **Add Activity** to add new line items if any activities were replaced with others, or to indicate how contingency funds were used.

![Add Activity]

<table>
<thead>
<tr>
<th>48: Winnetka Northfield</th>
<th>Community development: general</th>
<th>Working with Kids Against Hunger organize, promote and volunteer for a food packing event designed to engage 400-500 packers to pack 100,000 meals, for use in the USA and Nicaragua...</th>
<th>United States</th>
<th>3750</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>49: Woodstock</td>
<td>Community development: general</td>
<td>Organize and operate a Mobile Food Pantry in cooperation with the Northern Illinois Food Bank and the Woodstock Pantry 10 times a year.</td>
<td>Afghanistan</td>
<td>1604</td>
<td>0</td>
</tr>
</tbody>
</table>

**Spending plan total:** $99,440
When you have completed the table on disbursed funds, enter funds to be returned to The Rotary Foundation, if any. Check the box to authorize the report, and click **Submit**. At any time, you can click **Save** to ensure that your work is saved.