

**District 7980
District Managed
Grants Training**

2021-2022



D-7980 District Managed Grants Team

| | | |
|---------------|----------------------------------|-------------|
| Lynda Hammond | Grants Chair | Orange |
| Ted Taigen | DMG Committee Chair | Chester |
| John Merkel | District Steward | Mystic |
| Colin Gershon | District Rotary Foundation Chair | New Haven |
| Mukund Nori | Global & Peace Scholarship Chair | N. Branford |



The Rotary Foundation (TRF)



LEARNING OBJECTIVES

- Overview of The Foundation
- How grants are funded



Rotary Foundation Mission Statement

The mission of **The Rotary Foundation** is to enable **Rotarians** to advance world understanding, **goodwill**, and **peace** through the improvement of **health**, the support of **education** and the alleviation of **poverty**.



Our Rotary Foundation

A perfect score since 2007

| | Score (Out of 100) | Rating |
|-------------------------------|-----------------------|--------|
| Overall Score & Rating | 100.00 | ★★★★ |
| Financial | 100.00 | ★★★★ |
| Accountability & Transparency | 100.00 | ★★★★ |



Income →

The Rotary Foundation

→ **Disbursements**

5% for TRF Operating Expenses

Annual Fund Used in 3 years

Permanent Fund Endowment interest used in SHARE or other distributions

Restricted Fund Polio, Donor Advised, Memorials, Disaster Recovery

District Designated Funds (DDF)
Use up to 47.5% from the annual fund 3 years prior.

World Fund (General)

| | | |
|---|--|--|
| Major Donor \$10,000 | Arch Klump Society \$250,000 | Legacy Society \$1,000,000 Pledge |
| Bequest Society \$10,000 Pledge | Paul Harris Society \$1,000/yr to APF or Polio | Paul Harris Fellow \$1,000 |
| Benefactor \$1,000 pledge to PF | Sustaining Member \$100/yr | EREY Every Rotarian Every Year any \$\$ |

District Grants

District Management Grants - Small & Short term projects
Global Grants - Large & long term projects
Supporting:

- Humanitarian projects
- Scholarships of any level, length or area of study
- Vocational Training

Contributions

- Peace Centers
- PolioPlus
- Peace Fellowships

World Fund (Matching)

- Global Grant 80% DDF match
- PolioPlus 50% DDF match

Global Grants

Supports large international activities with sustainable, measurable outcomes in one of 7 Areas of Focus

- Humanitarian projects
- Scholarships at graduate level
- Vocational Training Teams

\$\$ Support \$\$

Individual Rotarians, Clubs, Districts, Corporate Matching, Gifts, Other Foundations, Trusts, Insurance, Estate Plans and Friends

\$\$ Beneficiaries \$\$

Rotarians, Clubs, Districts, International Partners, Scholars, Communities, Families, Children

DMGs... Support YOUR local & International Communities



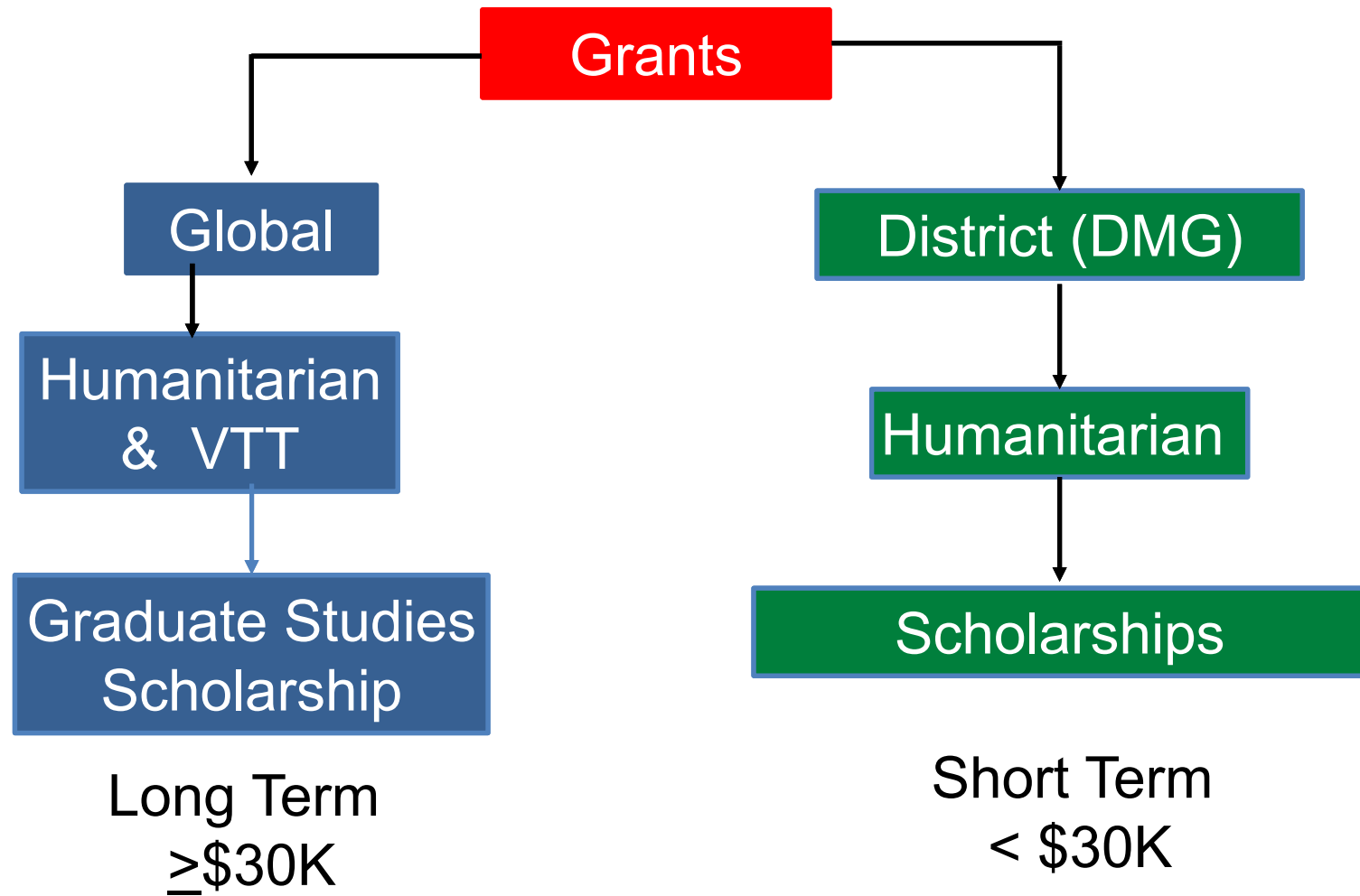
Ecuador – Global Grant



North Haven -DMG



The Rotary Foundation Grants



Global vs District Grants

| | GG | DMG |
|------------------------------------|----|------------|
| Must be in an Area of Focus | ✓ | |
| Community needs assessment | ✓ | Encouraged |
| Active Rotarian participation | ✓ | ✓ |
| Maybe local or international | ✓ | ✓ |
| Benefiting community participation | ✓ | ✓ |
| Short-term - 1 year projects | | ✓ |
| Minimum budget \$30,000 | ✓ | |
| Long-term sustainable impact | ✓ | Encouraged |
| Sustainable Measurable results | ✓ | Encouraged |
| Separate bank account for funds | ✓ | |

District Managed Grants - Learning Objectives

- Grants Overview
- What are DMGs
- Benefits to your Club
- Planning your project
- Project implementation
- How to Apply
- Stewardship
- Reporting



What are DMGs?

- Small-scale - no minimum budget
- Community Needs Assessment
- Short term -1 year or less
- Active Rotarian Participation
- Local or international activities
- Aligned with Project Categories



What are DMGs?

District Managed Grants support the efforts of District 7980 Rotary Clubs in the following Project Categories.

- Health
- Water
- Environment
- Peace
- Education
- Community Development
- Economic Development

Benefits of DMGs - Can Help Your Club!



- Increase Rotary Visibility in Your Community
- Engage New Members with Active Involvement
- Promote Attendance at Fund-Raising Events
- Encourage Participation in Local Interact Club
- Create Community Culture of “Giving Back”

DMG- Examples



- Emergency Water Purification System
- Warm Coats for Kids
- Youth Services Community Room
- Earth Day Memorial Tree Planting
- Upgrade Laptops for VNA
- "Teen Zone" for Community Library
- Baby Incubators in Rural Community
- Interactors Mentor Inner City Kids
- End Hunger Now – Meal Packing

DMG - Restrictions

- Projects involving microcredit are not permitted as they are long-term efforts
- Supporting fundraising activities
- Expenses related to Rotary events such as District Conferences
- Public relations initiatives, unless they are essential to carrying out the project
- Project signs that cost more than \$1,000



DMG - Restrictions

- The operating, administrative, or indirect program expenses of another organization
- Donations to a beneficiary or cooperating organization
- Expenses or commitments made prior to formal approval of the DMG
- Travel or related expenses to participate in a Polio National Immunization Day
- Repeat of the same by the same lead club within a period of three (3) Rotary years.



Project Planning – Community Assessment

- Community meeting
- Survey
- Interview
- Focus group
- Asset inventory
- Community mapping



Project Planning – Community Assessment

Assessing your community's strengths, weaknesses, needs, and assets is an essential first step in planning an effective project. By taking the time to learn about your community, you can discover the best opportunities for service and maximize your club's ability to make an impact.



Project Planning – Community Assessment

An assessment not only helps you better understand the dynamics of your community but also allows you and your project's beneficiaries to make informed decisions about service priorities. Even if you're actively involved in your community, an assessment can reveal additional strengths and opportunities for growth. Perhaps you'll find a new way to address a known issue, or give residents a chance to point out overlooked challenges. Before you start an assessment, consider what you want to learn about your community. An effective assessment will reveal things you did not know before.



Project Planning – Community Assessment

Resources expended But the needs were not met!

Public latrines built by an aid program that were dismantled and used for firewood by community members, as that was considered a greater need than sanitation.



Source: Engineering for Change

Project Planning – Community Assessment

Resources expended But the needs were not met!

Reported some women deliberately blocked household water delivery systems with rocks because they wanted water collection as a legitimate reason to leave the house and socialize with other women.



Source: Engineering for Change

Project Planning – Community Assessment

Resources expended But the needs were not met!

This dental chair was donated to Roosevelt National Hospital in Guatemala and as seen on the picture, it has never been used: Part of the original wrapping is still on the chair.



Source: Healthcare Access

Project Planning – Rotarian Involvement

Club Rotarians must be actively involved in the support of the humanitarian project. Involvement may include:

- Direct hands-on participation
- Assess community needs and development of a project plan
- Project oversight, financial management and required reporting
- Participate in the project implementation
- Document community involvement and ownership
- Meet with local service providers and local officials
- Arrange promotion of the project in the local media
- Rotary project recognition upon completion



Project Planning Qualifications

All District Managed Grants

All participating Clubs must complete the following:

- Complete Club D-7980 MOU
- TRF Goals are entered into Rotary Club Central
- All DMG Reporting is current



Project Planning – Conflict of Interest

A conflict of interest is defined as a situation in which a Rotarian, in relationship to an outside organization, is in a position to influence the spending of TRF grant funds, or influence decisions in ways that could lead directly or indirectly to financial gain for the Rotarian, a business colleague, or his or her family, or give improper advantage to others to the detriment of TRF. (NOTE: Any and all exceptions must be explained in an attached statement.)



Project Planning – DMG Funding

- Max \$2500 DDF match / grant/ club
- Max \$5000 per club during a Rotary year
- Max \$7500 per project with 2 or more partnering clubs
- Max \$2500 DDF match - during July-December (1st half of year)



Project Planning – Sustainability

Sustainability means different things to different organizations.

For Rotary, sustainability means providing long-term solutions to community needs that the beneficiaries can maintain after grant funding ends.



Project Planning – Sustainability

#1: Technology

- Selection of equipment and technology
- Buy locally whenever possible
- Availability of spare parts & support services Trade-off of capital cost v/s on-going expenses
- Consider life cycle analysis & costing



Project Planning - Sustainability

#2: Capacity Building

Build capacity so that community members can operate, maintain, and repair equipment on their own.



Project Planning - Sustainability

#3: Funds/Resources

Ensure resources are available to maintain, operate and funds the project after the DMG has been completed as required.



Project Planning- Sustainability

#4: Monitor, Evaluate & Report

- Establish baseline data and bench marks as identified in the needs assessment to monitor the project.
- Identify measurement methods to evaluate the project outcome/impact.
- Document and report the progress and outcome. **Report the good, bad and the ugly** so we don't continue to make the same mistakes.



Project Planning - Sustainability

We need to get away from the charity model, where we give things away, rather get into the opportunity model, where we empower people to carve their own paths out of poverty.

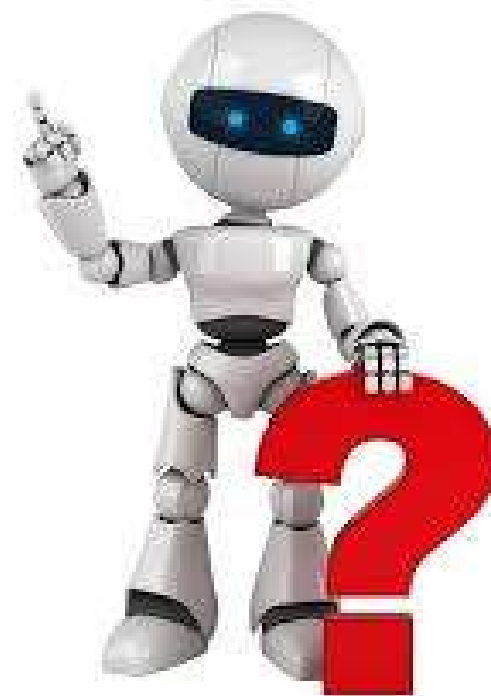
Rotary Community Corps, Woman's Co-ops, local NGOs, local governments and faith-based groups are tools which should be considered.



LEND A HAND

DMG - Commonly Made Errors

Conflict of Interest Benefiting non-profit who is a Rotarian cannot participate as a member of the DMG committee or have control over the disbursement of the grant funds.



DMG - Commonly Made Errors

Grant funds must be under the **direct control** of the Rotary Club. Not the benefiting non-profit or cooperating organization.



DMG - Commonly Made Errors

ANY **change** in the scope of the DMG project **MUST** be approved by the Grants Committee before proceeding.



LEND A HAND

DMG - Commonly Made Errors

Final Reports must reflect the project objectives & budget as stated in the DMG application.



DMG – Reminders

Expenses incurred prior to the approval date will not be considered part of the project, therefore they will not be funded!



DMG – Reminders

Family members of Rotarians may NOT be awarded a Youth or Global Scholarship – IRS Rules.



DMG – Reminders

All projects must be completed by September 15th, 2022. The final report must be filed within 60 days or by September 30th, 2022, whichever is sooner.



DMG ...Madness!

Avoid the melt down!



DMG Humanitarian Projects – How to apply!

1. Download DMG Instructions & Application- www.rotary7980.org
2. Lead Club: Form a 3-member project committee. Appoint a primary project contact.
3. Primary Contact is required to complete the on-line District Managed Grant training program, including the answering the test questions, which are then submit to John Merkel, District Steward. A minimum score of 80% is required.
4. Completed application is submitted to Ted Taigen, District Grants Chair at theodore.taigen@uconn.edu for committee review.
5. Approved DMG applications are then forwarded to District Grants Chair, Lynda Hammond for final review, approval and funding processing. All checks require 2 signatures: Grants Chair, Foundation Chair or DG.
6. Projects cannot begin until written approval is received from Lynda. Expenses made prior to approval cannot be reimbursed.

DMG Humanitarian Projects – Application

Please review the sample DMG application posted on the DMG Primary Contact training page for some very useful pointers from the DMG Review Committee.



DMG Scholarships For Our Youth



DMG RYLA Scholarships – How to apply!

1. Download District 7980 Youth Scholarship Application- www.rotary7980.org.
2. Submit application to Lynda Hammond, via email for approval & processing
3. Reporting - provide a copy of the RYLA certificate to L. Hammond for each student 10 days following the event.



Resources

- District 7980 websites
- Terms and Conditions of Rotary foundation District Grants and Global Grants (updated November 2019)
- District Leadership
- Rotarians involved in prior DMGs

DMG Case Study

Rotary Club of Mystic Coogan Giving Garden – Produce Production



DMG Humanitarian Project – Coogan Giving Garden



DMG – Coogan Giving Garden - Budget

Used Tractor

35 HP, 4 wheel drive, agricultural tires,
equipped with front-end loader, pallet forks, rit plow &
bed shaper/irrigation implement

Total Cost: \$15,955



DMG – Coogan Giving Garden – Funding

| | Club Funds | D-7980 Match | Total Funding |
|--------------|------------|--------------|-----------------|
| Mystic -Lead | \$2,500 | | |
| Stoningtons | \$2,500 | | |
| Waterford | \$500 | | |
| Montville | \$500 | | |
| Groton | \$955 | | |
| New London | \$1,500 | | |
| | \$8,455 | \$7,500 | \$15,955 |



DMG – Coogan Giving Garden – Awarded 2/27/15



DMG– Coogan Giving Garden – Produce Production



| Season | Production lbs |
|--------|----------------|
| 2014 | 2,088 |
| 2015* | 3,500 |
| 2016 | 12,000 |
| 2017 | 14,000 |

*DMG awarded.



DMG– Coogan Giving Garden – Produce Production



Rotary Club of Chester Chester Elementary School Aquarium



Case Study -Chester Elementary School Aquarium



Project Description:

- The aquarium center provides an exciting learning opportunities and serves as a “place of calm” for children and staff, while also nurturing respect and responsibility for nature.
- Contributes to the school’s environment. It has becomes a “happy spot” for students to catch a glimpse of their favorite fish.



Case Study -Chester Elementary School Aquarium

Describe how the benefiting community will maintain this project after grant funding has been fully expended.

The CES community, including students, parents (Chester PTO), & staff has enthusiastically embraced this project and will maintain the Aquarium Learning Center after it is established by this grant.



Case Study -Chester Elementary School Aquarium

Describe specific activities of each participating club in implementing the project. What will the Rotarians who are members of the club(s) do in connection with the project?

- Targeted fund raising and public awareness effort associated with our weekly Rotary Booth at the Chester Sunday Market, staffed by Rotarians and the School Principal.
- Participating in painting the ocean wall mural behind the aquarium, together with CES students and teachers.
- Assist with the physical assembly and set up of the Aquarium Center with the staff.



Case Study -Chester Elementary School Aquarium

Project Planning

- Equipment will be purchased by CES.
- CES will own and maintain the equipment
- No training is required. The CES staff have the skills & support of the Shoreline Pet & Aquarium staff.



Case Study – CES Aquarium Project - Budget

| | |
|-------------------------------|-----------|
| Aquarium Equipment & Supplies | \$3080.18 |
| Wood Bench (2) | \$1192.20 |
| Rotary Logo sign | \$310.90 |
| CES Logo sign | \$310.90 |
| Mural Paint & Art Supplies | \$100.00 |
| Total Budget | \$4994.18 |



Case Study – CES Aquarium Project - Funding

| | Club Funds | D-7980 Match | Total Funding |
|-----------------|------------|--------------|---------------|
| Chester RC Lead | \$2497.09 | \$2497.09 | \$4994.18 |

| Beneficiaries | Rotarians Involved | Project Start Date | Project End Date | Final Report Due |
|---------------|--------------------|--------------------|------------------|------------------|
| 207* | 21 | Sept. 2017 | 12/1/17 | 3/1/18 |

*Each year



Common DMG Pitfalls

Here are several examples of DMG Final Reports containing issues, some of which are extremely difficult to resolve after the project is complete.

DMG Final Report

Example #1

DMG Final Report– Example #1

PROJECT ITEMIZED BUDGET

Explanation: For detailed information on what District Managed Grants will fund, please see Terms and Conditions for Rotary Foundation Grants and Global Grants. [Click Here!](#)

| Budget item | Name of supplier | Budget Amount | Budget item | Name of supplier | Budget Amount |
|-------------------|------------------|---------------|-------------|------------------|-----------------------|
| Water filters - 5 | Acme | 2,500.00 | | | |
| | | | | | Total in U.S. dollars |
| | | | | | 2,500.00 |

From DMG App:



From DMG Final Report:



| Items Purchased/Project Expense | Budget in US \$ | Cost in US \$ |
|--|-----------------|---------------|
| Water filters | 2500 | 0 |
| Well pump | 0 | 2500 |
| Totals | (A) 2500 | (B) 2500 |
| Unused funds returned to District 7980, if (B) is greater than (A) | | 0 |
| Additional funds provided by Club, if (A) is greater than (B) | | 0 |

DMG Final Report – Example #1

PROJECT ITEMIZED BUDGET

Explanation: For detailed information on what District Managed Grants will fund, please see Terms and Conditions for Rotary Foundation Grants and Global Grants. [Click Here!](#)

| Budget item | Name of supplier | Budget Amount | Budget item | Name of supplier | Budget Amount |
|-------------------|------------------|---------------|-------------|------------------|-----------------------|
| Water filters - 5 | Acme | 2,500.00 | | | |
| | | | | | Total in U.S. dollars |
| | | | | | 2,500.00 |

Totals agree



Details disagree



| Items Purchased/Project Expense | Budget in US \$ | Cost in US \$ |
|--|-----------------|---------------|
| Water filters | 2500 | 0 |
| Well pump | 0 | 2500 |
| Totals | (A) 2500 | (B) 2500 |
| Unused funds returned to District 7980, if (B) is greater than (A) | | 0 |
| Additional funds provided by Club, if (A) is greater than (B) | | 0 |



DMG Final Report – Example #1

- Even though you spent the right amount of money, you could still have a problem. You must spend it the way you proposed. Altered expenses may not be allowable by TRF.
- **Change in the scope of the approved project must be approved by the grants committee before proceeding.**
- If you received approval from the grants committee for a scope change, attach the approval email to the Final Report

DMG Final Report

Example #2

DMG Final Report – Example #2

Project approved: July 31, 2020

RECEIPT No. **123456**

DATE JULY 7, 2020

FROM ACME SUPPLY \$ 152.78

ONE-HUNDRED FIFTY-TWO AND 78/100 DOLLARS

FOR RENT
 FOR PAINT

| | | |
|-------|--|-----------------------------------|
| ACCT. | | <input type="radio"/> CASH |
| PAID | | <input type="radio"/> CHECK |
| DUE | | <input type="radio"/> MONEY ORDER |
| | | <input type="radio"/> CREDIT CARD |

FROM _____ TO _____

BY _____

A-2501
T-16820



DMG Final Report – Example #2

Project approved: July 31, 2020



Purchase prior to DMG approval

Receipt form with handwritten details:

- RECEIPT
- No. 123456
- DATE: JULY 7, 2020
- FROM: ACME SUPPLY
- AMOUNT: \$152.78
- ONE-HUNDRED FIFTY-TWO AND 78/100 DOLLARS
- FOR: PAINT
- Payment method: CASH
- ACCT. PAID DUE
- FROM TO
- BY

DMG Final Report – Example #2

Projects may not be initiated, funds spent or obligations extended on behalf of the proposed DMG before the authorization date. These funds or commitments cannot be considered as part of the project expenditures.

DMG Final Report

Example #3

DMG Final Report – Example #3

From DMG Final Report:

By signing this report, I confirm that District Managed Grant funds of 2500 (US Dollars) were spent in accordance with Trustee approved Terms and Conditions for District Grants and that all information contained herein is true and accurate. Original receipts for all expenses will be retained for at least five (5) years in case of audit.

District 7980

Rotary Club: Happytown

DMG Primary Contact Name: Joe Rotarian

Signature: _____ Date: 2/1/2021

Club President Name: Jane Goodperson

Signature: _____ Date: 2/3/2021

RECEIPT No. **123456**

DATE MARCH 15, 2021

FROM ACME FOOD PURVEYORS **\$110.00**

ONE-HUNDRED TEN AND ~~XX~~ ^{XX} DOLLARS

FOR RENT

FOR HEALTHY FOOD

| | | |
|-------|--|-----------------------------------|
| ACCT. | | <input type="radio"/> CASH |
| PAID | | <input type="radio"/> CHECK |
| DUE | | <input type="radio"/> MONEY ORDER |
| | | <input type="radio"/> CREDIT CARD |

FROM _____ TO _____

BY _____

A-2501
7-49820



DMG Final Report – Example #3

From DMG Final Report:

By signing this report, I confirm that District Managed Grant funds of 2500 (US Dollars) were spent in accordance with Trustee approved Terms and Conditions for District Grants and that all information contained herein is true and accurate. Original receipts for all expenses will be retained for at least five (5) years in case of audit.

District 7980

Rotary Club: Happytown

DMG Primary Contact Name: Joe Rotarian

Signature: _____ Date: 2/1/2021

Club President Name: Jane Goodperson

Signature: _____ Date: 2/3/2021

Purchase
after DMG
completion
date



RECEIPT No. **123456**

DATE MARCH 15, 2021

FROM ACME FOOD PURVEYORS **\$110.00**

ONE-HUNDRED TEN AND ~~XX~~ ^{XX} DOLLARS

FOR RENT

FOR HEALTHY FOOD

| | | |
|-------|--|-----------------------------------|
| ACCT. | | <input type="radio"/> CASH |
| PAID | | <input type="radio"/> CHECK |
| DUE | | <input type="radio"/> MONEY ORDER |
| | | <input type="radio"/> CREDIT CARD |

FROM _____ TO _____

BY _____

A-2501
7-49820

DMG Final Report – Example #3

All funds must be expended prior to the DMG completion date, as recorded on the DMG Final Report.

DMG Final Report

Example #4

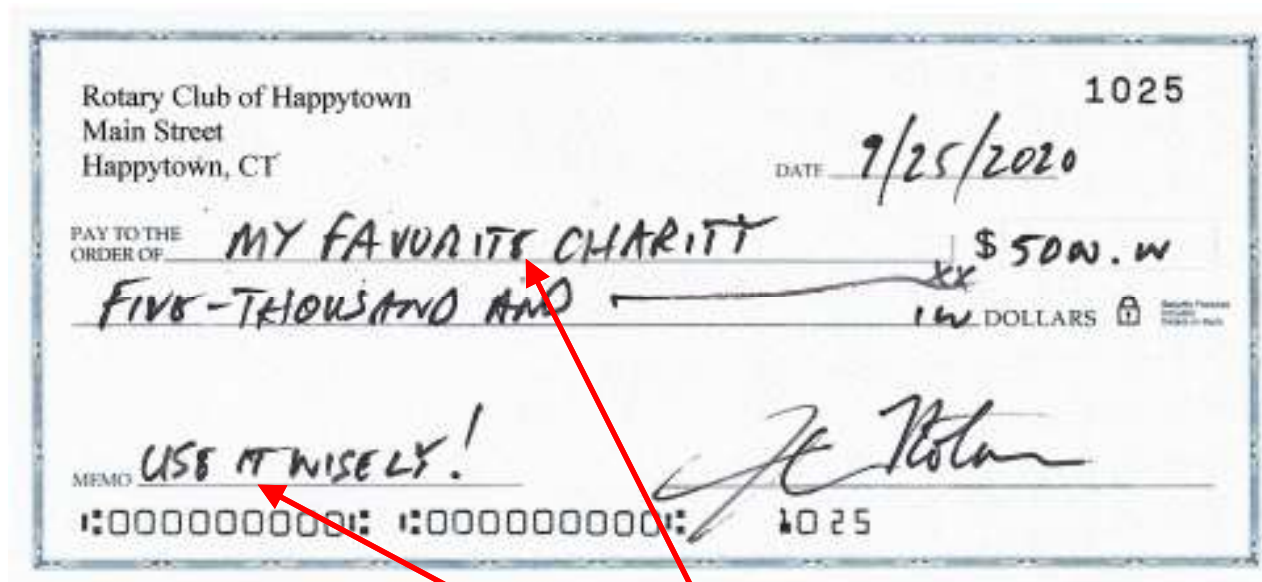
DMG Final Report – Example #4

from DMG Final Report:



DMG Final Report – Example #4

from DMG Final Report:



Funds not
under Club's
control



DMG Final Report – Example #4

- **All funds must be under the direct control of either the sponsoring or host Rotary Club. Under no circumstances may control be given to a cooperative organization or to the beneficiary.**
- Avoid writing a check to the cooperative or beneficiary organization unless there is a compelling reason (taxes, discount, etc.). In those rare cases gather detailed documentation to confirm that the funds were used as specified in the DMG application.

DMG Final Report

Example #5

DMG Final Report – Example #5

from DMG final report:

FINANCIAL DETAILS

Explanation: Provide the details of project spending versus the approved budget. Attach copies of all receipts to this is Final Report. Club funds are to be spent first, any unspent District funds are to be returned with the Final Report.

| Items Purchased/Project Expense | Budget in US \$ | Cost in US \$ |
|--|-----------------|---------------|
| Lumber | 500 | 500 |
| Paint | 150 | 150 |
| Miscellaneous hardware | 50 | 50 |
| Furniture | 500 | 0 |
| | | |
| | | |
| | | |
| Totals | (A) 1200 | (B) 700 |
| Unused funds returned to District 7980, if (A) is greater than (B) | | 500 |
| Additional funds provided by Club, if (B) is greater than (A) | | 0 |

DMG Final Report – Example #5

from DMG final report:

| FINANCIAL DETAILS | | |
|---|-----------------|---------------|
| Explanation: Provide the details of project spending versus the approved budget. Attach copies of all receipts to this is Final Report. Club funds are to be spent <u>first</u> , any unspent District funds are to be returned with the Final Report. | | |
| Items Purchased/Project Expense | Budget in US \$ | Cost in US \$ |
| Lumber | 500 | 500 |
| Paint | 150 | 150 |
| Miscellaneous hardware | 50 | 50 |
| Furniture | 500 | 0 |
| | | |
| | | |
| | | |
| Totals | (A) 1200 | (B) 700 |
| Unused funds returned to District 7980, if (A) is greater than (B) | | 500 |
| Additional funds provided by Club, if (B) is greater than (A) | | 0 |

Note underspend



DMG Final Report – Example #5

- **The Club's share of the project funds must be spent first before District monies are used. Any unspent funds must be returned to the District Grants Subcommittee Chair accompanied by a copy of the final report.**
- This Club handled the situation properly – funds not spent (presumably due to some unforeseen issue) were returned to the District.

DMG Final Report – Example #5

- **If at the conclusion of the project there are unspent funds, the club is encouraged to expand the project, if necessary, to use all the funds. Any expansion must be in line with the scope of the original project. Contact the District Grants Subcommittee Chair prior to proceeding.**
- This is usually the preferred way to handle unspent funds.

DMG Final Report – Example #5

from DMG final report:

FINANCIAL DETAILS

Explanation: Provide the details of project spending versus the approved budget. Attach copies of all receipts to this is Final Report. Club funds are to be spent first, any unspent District funds are to be returned with the Final Report.

| Items Purchased/Project Expense | Budget in US \$ | Cost in US \$ |
|--|-----------------|---------------|
| █ | █ | █ |
| Lumber | 500 | 500 |
| Paint | 150 | 150 |
| Miscellaneous hardware | 50 | 50 |
| Furniture | 500 | 0 |
| Light fixtures – change app'd by Grants Comm. | 0 | 500 |
| █ | █ | █ |
| Totals | (A) 1200 | (B) 1200 |
| Unused funds returned to District 7980, if (A) is greater than (B) | | █ |
| Additional funds provided by Club, if (B) is greater than (A) | | █ |

Grant \$ put to good use,
with prior approval



DMG Final Report

Example #6

DMG Final Report – Example #6

from DMG final report:

FINANCIAL DETAILS

Explanation: Provide the details of project spending versus the approved budget. Attach copies of all receipts to this is Final Report. Club funds are to be spent first, any unspent District funds are to be returned with the Final Report.

| Items Purchased/Project Expense | Budget in US \$ | Cost in US \$ |
|--|-----------------|---------------|
| Lumber | 500 | 500 |
| Paint | 150 | 150 |
| Miscellaneous hardware | 50 | 50 |
| Furniture | 500 | 500 |
| Area rug | 0 | 200 |
| | | |
| | | |
| Totals | (A) 1200 | (B) 1400 |
| Unused funds returned to District 7980, if (A) is greater than (B) | | 0 |
| Additional funds provided by Club, if (B) is greater than (A) | | 200 |



DMG Final Report – Example #6

from DMG final report:

| FINANCIAL DETAILS | | |
|---|-----------------|---------------|
| Explanation: Provide the details of project spending versus the approved budget. Attach copies of all receipts to this is Final Report. Club funds are to be spent <u>first</u> , any unspent District funds are to be returned with the Final Report. | | |
| Items Purchased/Project Expense | Budget in US \$ | Cost in US \$ |
| Lumber | 500 | 500 |
| Paint | 150 | 150 |
| Miscellaneous hardware | 50 | 50 |
| Furniture | 500 | 500 |
| Area rug | 0 | 200 |
| | | |
| | | |
| Totals | (A) 1200 | (B) 1400 |
| Unused funds returned to District 7980, if (A) is greater than (B) | | 0 |
| Additional funds provided by Club, if (B) is greater than (A) | | 200 |



Note overspend



DMG Final Report – Example #6

- If additional costs are incurred during the project it is okay for the Club to supplement with funds from another source, usually the Club itself.
- This Club handled the situation properly – extra funds were provided by the Club.

DMG Final Report

Example #7

DMG Final Report – Example #7

from DMG App:

PROJECT PLANNING

Explanation: Before an application is submitted to District 7980, project partners should discuss various planning details, including plans for the contributions of Rotarians who will be actively involved in the project. Additional questions in this section are intended as an aid to project planning.

Describe specific activities Rotarians will perform in the planning and implementation of the project. Please note financial support is not considered active involvement. Need help? [Click Here!](#)

Rotarians will plant flowers at the entrance to the nursing home

from DMG Final Report:

Describe how these Rotarians participated: *Rotarians trimmed hedges and shrubbery around the border of the nursing home.*

DMG Final Report – Example #7

from DMG App:

PROJECT PLANNING

Explanation: Before an application is submitted to District 7980, project partners should discuss various planning details, including plans for the contributions of Rotarians who will be actively involved in the project. Additional questions in this section are intended as an aid to project planning.

Describe specific activities Rotarians will perform in the planning and implementation of the project. Please note financial support is not considered active involvement. Need help? [Click Here!](#)

Rotarians will plant flowers at the entrance to the nursing home

from DMG Final Report:

Describe how these Rotarians participated: *Rotarians trimmed hedges and shrubbery around the border of the nursing home.*

Discrepancy



DMG Final Report – Example #7

Final report must explain any discrepancy between what the application said would happen vs what did actually happen.

DMG Final Report – Example #7

from DMG App:

PROJECT PLANNING

Explanation: Before an application is submitted to District 7980, project partners should discuss various planning details, including plans for the contributions of Rotarians who will be actively involved in the project. Additional questions in this section are intended as an aid to project planning.

Describe specific activities Rotarians will perform in the planning and implementation of the project. Please note financial support is not considered active involvement. Need help? [Click Here!](#)

Rotarians will plant flowers at the entrance to the nursing home

a better Final Report:

Describe how these Rotarians participated: *The original plan was for Rotarians to plant flowers at the entrance to the nursing home. Due to a communication error, contract gardeners did the work before Rotarians could arrive. Instead our Rotarians trimmed hedges and shrubbery around the border of the nursing home.*

Explains reason
for change

DMG Final Report

Example #8

DMG Final Report – Example #8

from the DMG app:

How will the project benefit the community and the intended beneficiaries.

200 children at Paul Harris Middle School will be able to build and test robots as a result of the robotics lab this grant will establish.

from the DMG final report:

How many Non-Rotarians benefited from this project? How were they helped?

100 children were able to build and test robots this year.

DMG Final Report – Example #8

from the DMG app:

How will be project benefit the community and the intended beneficiaries.

200 children at Paul Harris Middle School will be able to build and test robots as a result of the robotics lab this grant will establish.

from the DMG final report:

How many Non-Rotarians benefited from this project? How were they helped?

100 children were able to build and test robots this year.

Discrepancy



DMG Final Report – Example #8

Final report must explain any discrepancy between what the application said would happen vs what actually did happen.

DMG Final Report – Example #8

from the DMG app:

How will be project benefit the community and the intended beneficiaries.

200 children at Paul Harris Middle School will be able to build and test robots as a result of the robotics lab this grant will establish.

a **better** DMG final report:

How many Non-Rotarians benefited from this project? How were they helped?

Due to budget cuts one of the two teachers who would have supervised the robotics lab was laid off, with the number of classes reduced accordingly. Only 100 children will use the lab this year. However the robotics lab will remain in place for hundreds of future students.

Explains reason
for change



DMG Final Report

Example #9

DMG Final Report – Example #9

Report must include documentation of partner club financial participation in the form of canceled checks or a bank statement showing deposit of partner club contributions.

Option 1 -
canceled check:

ST. MARTIN DE PORRES ACADEMY
A NATIVITY MIGUEL SCHOOL
238 COLUMBUS AVENUE
NEW HAVEN, CT 06519

WEBSTER BANK
HAMDEN, CT
51-70102111

10364

CHECK DATE: 12/19/2018

CHECK NO.: 10364

CHECK AMOUNT: \$** 100.00

PAY TO THE ORDER OF: Rotary Club of Ridgefield
PO Box 41
Ridgefield, CT 06877

VOID AFTER 90 DAYS

Authorized Signature: *William P. ...*

⑆010364⑆ ⑆211170101⑆ 0009883659⑆

>>221172270<<
2/2/2019
11:42:17
EB3292
TMID 3750331942133



DMG Final Report – Example #9

Option 2 - bank statement:



Your checking account

SUNRISE ROTARY 21ST CENTURY | Account # 0094 1902 9719 | March 1, 2019 to March 31, 2019

Deposits and other credits

| Date | Description | Amount |
|---|--|-------------------|
| 03/08/19 | BKOFAMERICA MOBILE 03/08 3631800565 DEPOSIT *MOBILE CT | 5,578.50 |
| 03/08/19 | BKOFAMERICA MOBILE 03/08 3631799151 DEPOSIT *MOBILE CT <i>FAIRFIELD ROTARY DMG FOR TREE OF LIFE</i> | 1,000.00 |
| 03/11/19 | BKOFAMERICA MOBILE 03/11 3602650820 DEPOSIT *MOBILE CT | 200.00 |
| Total deposits and other credits | | \$6,778.50 |



District 7980 Rotarians

Together **WE**
change and **save**
lives everyday!

