If after reading these instructions you still have questions, please contact your Service Board Chair or the SF Rotary Foundation. We’re happy to help.

If a particular section does not apply to your project, mark the line labeled “N/A” or if Yes/No, check the “No” line. If there is no “N/A” or Yes/No line, the section applies to all projects. Pease don’t leave sections blank; incomplete reports will have to be returned to you for completion.

# 1. Project Basics

**a. Name**. Give the full name of your proposed grant-funded project, without abbreviations. Examples: Action Leadership Program for Students; Interact Leadership Scholarships.

**b. Short Name**. If there’s a convenient acronym or shortened name, put this here. Examples: ALPS; Interact Scholarships.

**c. Rotary Foundation grant number**. This was provided on your award letter.

**d.** The **Project Leader**, normally the person who prepared the original application, is the point of contact for Rotary concerning your grant application and report.

**e**. **Project period**. Period, (such as 2020-2021) or event date (such as May 1, 2021).

**f. Grant amount awarded**. If the amount actually received was different, show that in your Budget Report.

# 2. Status and Date

**a. Interim reports.** If your project is winding up, and you are submitting this report in advance in order to apply for funding for the coming year, this is a “Interim Report.” Check the line to indicate this, and note the instructions below for projecting final numbers for objectives and expenditures.

**b. Date of report** – Interim Reports give the expenditures and project completion information “as of” a particular date. For example, the final completion of your project may be June 2021 but you are submitting the Interim Report in March, and you have the data through March 15. Therefore, give the “Date of Report” as March 15, 2022.

# 3. Rotarian Participation

If you are submitting a Interim Report and you expect the numbers to grow, put the projected final numbers within the parentheses.

# 4. Implementation Synopsis, Including Successes and Challenges

This section provides an opportunity for you to briefly (up to 10 lines) tell the story of the project’s implementation. If all went as expected, this can be brief.

Example:

“Once again, the program was very well received, and we met or exceeded all our objectives (see below).”

If your project encountered unexpected challenges (e.g. personnel changes, unexpected barriers to recruitment, a global pandemic, etc.) this section is the place to explain this.

Example:

“Two weeks after the project began, the Nurse Practitioner who had volunteered to be the key medical provider became unavailable due to taking a job in another city. We struggled to find another qualified medical provider, but finding an interested professional who had the time available was difficult. In addition, due to the mental health issues experienced by many of the homeless clients, we needed to find a provider who was experienced with this population. We did find a very qualified person, but our project implementation was delayed. As a result [and so on]…”

# 5. Completion of Objectives

Please give each entire objective, and then on the lines below the number to date, and if a Interim Report, the final number you expect to see when the project is completed.

Example:

“Objective 1: Provide medical screening and health coaching to at least 20 homeless families.

“Actual number to date: 13 Projected at end date: 17

“Comments. Because of a delay caused by the need to replace one of our medical volunteers, discussed above, the project started recruitment of families two months late. We have been catching up to our goal of 20, but we do not expect to reach 20 participants.”

# 6. Rotary Recognition and Project Publicity

**a. Recognition.** Tell how you publicly acknowledged SF Rotary support, giving the specific language used. For example, if you acknowledged Rotary support on your website, please say which page and quote what was said

**b. Publicity.** Tell how was your project publicized within Rotary, and how your project was brought to the attention of the general public and/or service recipients.

# 7. Lessons Learned

a. What could be done differently to achieve a more successful outcome?

b. Would you recommend this project be done again in the future ? Why or why not?

# 8. Financial Reporting

First, show the amount of grant funds not expended by the end of the project, or if an Interim report, the amount you anticipate to have remaining at the end of the project.

If you have funds remaining from the grant, and these have not yet been returned to SFRF, this will have to be resolved before a new grant can be made.

**FINANCIAL REPORT**. Attach a detailed financial report on the disbursement of Rotary grant funds, by expense category. Assuming your initial application’s budget showed anticipated disbursements by category, you may use that budget as the starting point for your report. After each category of expense, please show amount proposed in your application and, in a column to the right, the amount actually spent to date. If this is an Interim Report, in a third column show the amounts you expect to expend by the end of the grant period.

# Naming Your Files

In order to make sure the SF Rotary Foundation can track your Final Report, please—

• Include the short name of your project in the name of your file and the words “Final Report”

• Put the fiscal year in the name, i.e. 2021–22

• For appendices, include the above information, plus “Appendix” and the number, i.e. Appendix 1

Examples: ALPS.Interim Report.2020-21.docx; Interact Scholarships.Final Report.2020-21.Appendix1.xls