



Report Supplement for Revolving Loan Grants *The Rotary Foundation*

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Revolving Loan Grants create sustainable access to financial services for poor and low-income individuals. Due to their complex nature, The Rotary Foundation (TRF) requires detailed information on the loans and how they are organized. As revolving loans can continue indefinitely, TRF will consider the grant completed and ready for closure if one cycle has been loaned out, repaid and loaned out for another cycle.

There are two sections of the Report Supplement for Revolving Loan Grants that should be attached to the grant report form.

- 1) *Cumulative Summary of Credit Groups*-Complete the table below to provide a cumulative summary of the total number of individual credit groups. This will provide an overview of all of the credit groups.
- 2) *Individual Credit Group Report* –Complete the information on the following page for each credit group. Make copies of the Individual Credit Group Report as necessary.

Project Information

Grant Number _____ Project Country _____
 Progress report Final report Reporting Period from _____ to _____
 Host Partner Rotary Club: _____ District: _____
 International Partner Rotary Club: _____ District: _____

Cumulative Summary of Credit Groups

The information in the Cumulative Summary is compiled from information in the Individual Credit Group Reports. Please add rows as needed.

Currency Used: _____ Exchange Rate: _____ = 1 USD

Name of Credit Group	Number of Loan Recipients/ Beneficiaries	Number of Loans Disbursed	Average Loan Size	Annual Interest Rate	Annual Interest Income	Amount Disbursed	Reserve* Amount
Total:							

*The amount of capital held back from investment in order to meet probable or possible demands.

How was interest earned utilized?

Individual Credit Group Report

Instructions: A copy of this page needs to be completed for each credit group before the grant will be closed. A credit group is an organized group of borrowers agreeing to cross-guarantee each other's loans (the text boxes below expand).

1. Name of Credit Group:

2. Location:

3. List the loan recipients, interest rates, loan amounts and payback schedule (duration of loan).

Currency Used: _____ Exchange Rate: _____ = 1 USD

Loan Recipient (Beneficiary)	Annual Interest Rate	Loan Amount	Purpose of loan	Payback schedule or duration (example: duration 90 days)

4. Describe the counseling and support being provided to the loan recipients, such as vocational training, literacy, health, family planning and finance:

5. Identify who has the funds, who will take control of the funds, and how this transfer of funds will be documented after the submission of the final report for the grant project. This ensures that loan fund capital will continue to be used for revolving loans in accordance with the policies adopted:

6. If funds are being returned, indicate amount below:

Currency Used: _____ Exchange Rate: _____ = 1 USD