

District Grants Club Memo of Understanding Addendum (MOU)

Club Qualification

To participate in Rotary District grants, the club must agree to implement the financial stewardship requirements in this Memorandum of Understanding (MOU) provided by The Rotary Foundation (TRF). By completing these requirements, the club becomes qualified and eligible to participate in the District Grant Program.

- A. Clubs must have contributions to the Rotary Foundation Annual Share Fund of at least \$75.00 per capita in at least one of the past three years to qualify for a District Grant. Special consideration will be given to clubs attaining \$100.00 per capita giving if grant requests exceed District Grant Funds available for distribution.
- B. The Club President along with the Club Treasurer, Club Foundation Chair, or another board member must attend the District Grant Training.
- C. Upon successful completion of the qualification requirements and submission of an executed MOU by **July 15, 2024**, the club will be qualified for one Rotary year.
- D. To maintain qualified status, the club must comply with this MOU, and any additional district requirements, and all applicable TRF policies.
- E. The club is responsible for the use of funds for club-sponsored grants, regardless of who controls the funds.
- F. Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud, forgery, membership falsification, gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes.
- G. The club must cooperate with any financial grant, or operational audits.

Club Leadership Responsibility

The club officers hold primary responsibility for club qualification and the proper implementation of District Grants.

Club officer responsibilities include:

- A. Appointing at least one club member to implement, manage, and maintain club qualifications.
- B. Ensuring that all District grants adhere to stewardship measures and proper grant management practices.
- C. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest.

Financial Management Plan

The club must adhere to the following to provide consistent administration of grant funds.

- A. A budget for the proposed project must be submitted with the District Grant Application.
- B. As District Grants are matching grants, documentation must be submitted on how the balance of the project will be funded.
- C. The club Treasurer and/or another authorized officer must sign all checks related to any disbursement of grant funds received by the club for any District Grant.
- D. A copy of all Bank Statements will be kept both hard copy and electronically.
- E. Maintain a record of all receipts related to Grant activities both in hard copy and electronically.
- F. Maintain an inventory system for equipment and other assets purchased with grant funds, and maintain records for items purchased, produced, or distributed through grant activities.
- G. The Club is responsible for appointing a new person to any of the roles of the Club Treasurer or Club Foundation Chair and providing a copy of this document, so they are aware of their duties as they relate to the District Grants/Monies.
- H. Ensure that all grant activities comply with local law.

Document Retention

The club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualifications and District Grants. Retaining these documents supports transparency in grant management and assists in the preparation for audits or financial assessments.

Hard Copy and Electronic copy of documents that must be maintained include, but are not limited to:

- A. Bank information, including copies of past statements.
- B. Club qualification documents including a copy of the signed club MOU, Grant application and Grant Final Report.
- C. Information related to grants, including receipts and invoices for all purchases.

Club records must be accessible and available to Rotarians in the club and at the request of the district.

Documents must be maintained for a minimum of seven years.

Reporting on Use of Grant Funds

The club must submit a final report along with all receipts of the District Grant Project within **60 days of completion or by June 30, 2025.**

Reporting Misuse of Grant Funds

The club must report any potential and real misuse or mismanagement of grant funds to the District Governor and/or District Foundation Chair. This report fosters an environment in the club that does not tolerate the misuse of grant funds.

Authorization and Agreement

For clubs to qualify for District Grants, this page must be completed by the Club President, Club Foundation Chair or another board member and submitted to:

PDG John Marshall
 4149 Glasgow Road
 Valencia, PA 16059
john@johnmarshallcatering.com

This Memorandum of Understanding is an agreement between the club and the district and acknowledges that the club will undertake measures to ensure the proper implementation of grant activities and proper management of Foundation grant Funds. By authorizing this document, the club agrees to comply with all the conditions and requirements of the MOU.

On behalf of the Rotary Club of _____, the undersigned agree to comply with all the conditions and requirements of the MOU (Memorandum of Understanding) for the Rotary Year 2024 – 2025, and will notify Rotary International District 7280 of any changes or revisions to club policies and procedures related to these requirements.

Term	2024-2025
Name	
Signature	
Club Title	Club President
Date	

Term	2024-2025
Name	
Signature	
Club Title	
Date	