



# Rotary District 6820

## DDF Grants - 2021-22 Application

### *Grant Application Process Procedures*

- Submit your grants as soon as possible to Ed Thurmond, District Grants Chair at edthurmond42@gmail.com.
- **GRANTS MUST BE APPROVED PRIOR TO SPENDING ANY FUNDS PER ROTARY INTERNATIONAL GRANTS RULES!**
- Once you submit the grant, If you have not heard from the grants committee chair within one week please contact Ed Thurmond, District Grants Chair at edthurmond42@gmail.com.
- Final reports are due back within 30 days of the completion of the project
- Refunds are due within 30 days of the completion of the project. Mail refund checks to: Lucy Anne Walker, 70 Brickerton Street, Columbus, MS 39701



## Rotary District 6820

## DDF Grants - 2021-22 Application

District Use Only:

Date Received: \_\_\_\_\_

Date Approved: \_\_\_\_\_

**Club Name:** \_\_\_\_\_

**Project Name:** \_\_\_\_\_

**Date of Request:** \_\_\_\_\_

***Please print or type all information and use additional sheets of paper if necessary.***

*Incomplete applications will be returned with a brief explanation.*

1. Describe the project, its location, and its objectives.

Estimated Start Date: \_\_\_\_\_ Estimated Completion Date: \_\_\_\_\_

2. Describe how the project will benefit the community and/or improve the lives of the less fortunate and the number of members of the community whose needs will be met by the implementation of this project.

3. Describe non-financial participation by Rotarians in the project (i.e. SPECIFIC Rotarian Activities).
  
4. If this is an international project, how will the host and international partners communicate and work together to implement this project?
  
5. District 6820 Club Grants program will provide funds for acceptable projects from District Grants Funds. Approved District Grants will be approved up to a 50% match based on available funds.

Total Project Cost:           \$ \_\_\_\_\_

Club Contribution:           \$ \_\_\_\_\_

District Funds Requested: \$ \_\_\_\_\_

6. Project Contacts: Two Rotarians must be listed who will provide oversight and management of the project funds.

Primary Contact Name: \_\_\_\_\_

Rotary Position/Title: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ e-mail: \_\_\_\_\_

Secondary Contact Name: \_\_\_\_\_

Rotary Position/Title: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ e-mail: \_\_\_\_\_

Project Funds: **Rotary District 6820 Treasurer Please Mail Check To:**

Rotary Position:

Name:

Mailing Address:

7. Club Foundation Committee Chair: The Club must have this committee, had a member attend the Grants Management training and be certified each year to be eligible to receive a District Grant. Additionally, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF). Please attach necessary documentation of training. (Copy of signed Club Memorandum of Understanding)

Club's Foundation Committee Chair: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ e-mail: \_\_\_\_\_

8. How will the general public know this is a Rotary-sponsored project? All district funded grants must publicize that the project was in conjunction with Rotary 6820 funds. Please provide details, e.g., publicity in a newspaper, radio, television, social media, display of Rotary logo, etc.:

9. Cooperating Organizations: If the project involves a cooperating organization, please provide the name of the organization below and attach a letter of participation from that organization that specifically states its responsibilities and how Rotarians will interact with the organization in the project. By signing this application, the Rotarian sponsors endorse the organization as reputable, responsible, registered with the project country, and acting within the project country.

Name(s) of Cooperating Organization(s): \_\_\_\_\_

10. Budget: Please include a complete, detailed, and itemized budget for the entire project, listing item, vendor/contractor and amount. Supporting documentation utilized for the development of this budget may be requested. Be sure to include pro forma invoices of all items costing \$1,000 or more. Use separate page if necessary.

11. Timetable: Please include a proposed timetable for the implementation and completion of this project. Please note an approximate date by which the District Rotary Foundation Committee should expect to receive a final report on the project which is required within 30 days of the completion of the project. Use a separate page if necessary.

12. Authorization: All Rotary clubs/districts involved in this project are responsible to The Rotary Foundation for the conduct of the project and for reporting of it. The signatures on the application confirm that the sponsors understand and accept the responsibility. The signature of the sponsors also affirm that all information in this application is true and accurate, to the best of their knowledge.

CLUB PRESIDENT: As President of the Rotary Club of \_\_\_\_\_

I hereby affirm that the Club has voted to undertake this project as an activity of the club.

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Name, PRINTED

SIGNATURE

Date

CLUB PRESIDENT-ELECT: As President-Elect of the Rotary Club of \_\_\_\_\_

I hereby affirm that the Club has voted to undertake this project as an activity of the club.

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Name, PRINTED

SIGNATURE

Date

GRANT APPLICATION RECEIVED BY TRF DISTRICT 6820 FOUNDATION COMMITTEE CHAIR

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Name

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Signature, TRF District 6820 Foundation Committee Chair

Date

THE ROTARY FOUNDATION DISTRICT 6820 COMMITTEE RESULTS:

GRANT APPROVED \_\_\_\_\_ GRANT DENIED \_\_\_\_\_

\_\_\_\_\_  
Name

\_\_\_\_\_  
Signature, District 6820 Grants Sub- Committee Chair

\_\_\_\_\_  
Date

DISTRICT GOVERNOR: As Governor of District 6820, I hereby affirm the use of US\$ \_\_\_\_\_,  
from my District's Grant Funds for this project.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Signature, District 6820 Governor

\_\_\_\_\_  
Date

Individual Project Summary

District Grant # \_\_\_\_\_

If you have questions about District Grants, please feel free to contact the District Rotary Foundation  
Committee Chair or District Grants Sub-Committee Chair at:

The Rotary Foundation District Committee Chair

Jennifer Bucurel

601-701-3470

[jenniferbucurel@yahoo.com](mailto:jenniferbucurel@yahoo.com)

The Rotary Foundation District Grants Chair

Ed Thurmond

[edthurmond42@gmail.com](mailto:edthurmond42@gmail.com)

(601) 946-8065

**Completed applications must be e-mailed to: Ed Thurmond**

**CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING**

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## **THE ROTARY FOUNDATION**

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds

### **1. Club Qualification**

To participate in Rotary Foundation global and packaged grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF) and to send at least one club member to the district's grant management seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in Rotary Foundation district grants. By completing these requirements, the club becomes qualified and eligible to participate in the TRF grant program.

- A. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.
- B. To maintain qualified status, the club must comply with this MOU, any additional district requirements, and all applicable TRF policies.
- C. The club is responsible for the use of funds for club-sponsored grants, regardless of who controls the funds.
- D. 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.
- E. The club must cooperate with any financial, grant, or operational audits.

### **2. Club Officer Responsibilities**

The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants.

Club officer responsibilities include:

- A. Appointing at least one club member to implement, manage, and maintain club qualification
- B. Ensuring that all TRF 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

Club Memorandum of Understanding (June 2012) 2

### **3. Financial Management Plan**

The club must have a written financial management plan to provide consistent administration of grant funds.

The financial management plan must include procedures to

- A. Maintain a standard set of accounts, which includes a complete record of all receipts and disbursements of grant funds
- B. Disburse grant funds, as appropriate
- C. Maintain segregation of duties for handling funds
- D. Establish an inventory system for equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities
- E. Ensure that all grant activities, including the conversion of funds, comply with local law

### **4. Bank Account Requirements**

- A. The club bank account must
  1. Have a minimum of two Rotarian signatories from the club for disbursements
  2. Be a low- or noninterest-bearing account
- B. Any interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.
- C. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.
- D. Bank statements must be available to support receipt and use of TRF grant funds.
- E. The club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.

**5. Report on Use of Grant Funds**

The club must adhere to all TRF reporting requirements. Grant reporting is a key aspect of grant management and stewardship, as it informs TRF of the grant's progress and how funds are spent.

**6. Document Retention**

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

A. Documents that must be maintained include, but are not limited to:

- 1. Bank information, including copies of past statements
- 2. Club qualification documents including a copy of the signed club MOU
- 3. Documented plans and procedures, including:
  - a. Financial management plan
  - b. Procedure for storing documents and archives
  - c. Succession plan for bank account signatories and retention of information and documentation
- 4. Information related to grants, including receipts and invoices for all purchases

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

C. Documents must be maintained for a minimum of five years, or longer if required by local law.

Club Memorandum of Understanding (June 2012) 3

**7. Reporting Misuse of Grant Funds**

The club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the club that does not tolerate the misuse of grant funds.

**Authorization and Agreement**

*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 of the conditions and requirements of the MOU.*

*On behalf of the Rotary Club of \_\_\_\_\_, the undersigned agree to comply with all of the conditions and requirements of the MOU for Rotary year 2021-2022 and will notify Rotary International District 6820 of any changes or revisions to club policies and procedures related to these requirements.*

**Club President**

**Club  
President-elect**

**Term** \_\_\_\_\_

**Term** \_\_\_\_\_

**Name** \_\_\_\_\_

**Name** \_\_\_\_\_

**Signature** \_\_\_\_\_

**Signature** \_\_\_\_\_

**Date** \_\_\_\_\_

**Date** \_\_\_\_\_



**FINAL REPORT - Due within 30 days of completion of project**

**ROTARY DISTRICT 6820 GRANT FINAL REPORT**

**ROTARY YEAR 2021-22**

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**Rotary Club:** \_\_\_\_\_

**Project Title:** \_\_\_\_\_

**Beneficiaries**

**How many non-Rotarians benefited from this project?** \_\_\_\_\_

**Financial Report**

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Club funds \_\_\_\_\_

District Grant funds \_\_\_\_\_

Other source of funds (itemize) \_\_\_\_\_

**Unused Funds:** \_\_\_\_\_ **return to District 6820 Grant Fund Account within 30 days of completion of project to: Lucy Anne Walker, 70 Brickerton Street, Columbus, MS 39701**

**1. Expenditures Copy of invoice(s) please (Original Invoices must be saved by club for 3 years)**

\_\_\_\_\_

**Total Project Expenditures** \_\_\_\_\_

**2. By signing this report, I confirm that to the best of my knowledge these District Grant funds were spent only for eligible items in accordance with Trustee-approved guidelines, and that all of the information contained herein is true and accurate. Receipts for all grant-funded expenditures have been provided to the district. I also understand that all photographs submitted in connection with this report will be the property of RI and TRF s royalty free irrevocable license to use the photographs now or at any time in the future, throughout the world in any manner it so chooses and in any medium now known or later developed. This includes the right to modify the photograph(s) as necessary in RI's sole discretion. This also includes, without limitation, use on or in the web sites, magazines, brochures, pamphlets, exhibitions and any other promotional materials of RI or TRF.**

**Signature of Project Contact:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Printname, Rotarytitle, and club:** \_\_\_\_\_