ENGLISH (EN)

COOPERATING ORGANIZATION MEMORANDUM OF UNDERSTANDING

An agreement between

[Name of Rotary Club], Rotary Club,”

[Name of cooperating organization], “Organization 1,”

and [Name of cooperating organization], “Organization 2”

# SUBJECT

District Grant #[Grant number], [Title], in [Community, County], the “District Grant.”

# DEFINITION

A cooperating organization is any reputable organization that provides expertise, infrastructure, advocacy, training, education, or other support for the grant project. Cooperating organizations must comply with all reporting and auditing activities required by The Rotary Foundation and provide receipts as requested.

# PURPOSE

This document establishes an agreement between the parties listed above to implement a project funded by a Grant from The Rotary Foundation. This document may also be used with other groups that are participating in the project, such as beneficiary organizations, nonprofit contractors, or government agencies.

# PROJECT OBJECTIVES

All parties listed in this agreement will collaborate to achieve the following project objectives:

* 1. [add objective]
  2. [add objective]
  3. [add objective]

# ROTARY CLUB RESPONSIBILITIES

Describe the specific responsibilities of the Rotary Club. The Rotary Club will:

* 1. [add specific responsibilities for this project]
  2. [add specific responsibilities for this project]
  3. [add specific responsibilities for this project]

# ORGANIZATION 1 RESPONSIBILITIES

Describe the specific responsibilities of Organization 1. Organization 1 will:

* 1. [add specific responsibilities for this project]
  2. [add specific responsibilities for this project]
  3. [add specific responsibilities for this project]

# ORGANIZATION 2 RESPONSIBILITIES

Describe the specific responsibilities of Organization 2. Organization 2 will:

* 1. [add specific responsibilities for this project]
  2. [add specific responsibilities for this project]
  3. [add specific responsibilities for this project]

# MUTUAL UNDERSTANDINGS

All parties agree that:

* 1. The Rotary Grant, if approved, will be awarded to the Rotary Club
  2. The Rotary Club will control and manage the Rotary Grant.
  3. The Rotary Club will be involved in all stages of the project.
  4. The Rotary Club will have a grant management committee responsible for managing the project on their behalf.
  5. The Rotary Club and the Organizations will abide by the [Terms and Conditions for Rotary Foundation District Grants.](https://d.docs.live.net/9cb924ce0be0587c/Documents/00%20Rotary/05-%20Foundation/2022-2025%20Stewardship/2023-24%20Grants%20Info/Terms%20and%20Conditions%20for%20Rotary%20Foundation%20District%20Grants)
  6. The Rotary Club affirms that the Organizations are reputable and responsible and act within all local, state and federal laws.
  7. All payments to vendors and reimbursements to Organizations will be supported by receipts, paid invoices, vouchers or written agreements.
  8. The Organizations may contribute funds toward the project.
  9. The Organizations’ project-related documentation may be subject to independent financial and operational review by District 5240 or The Rotary Foundation.
  10. In their separate club qualification memorandum of understanding, the Rotary Club has agreed to:
      + Ensure that all grant activities comply with local law
      + Ensure that the project adheres to The Rotary Foundation’s stewardship measures and grant management practices
      + Ensure that all people involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest
      + Provide the funds for the project with reimbursement of Rotary Foundation funds subject to successful completion of the project and acceptance of a final grant report.
      + Report to the district any potential or real misuse or mismanagement of grant funds
      + Cooperate with any financial, grant, or operational audits
      + Maintain a standard set of accounts, which includes a general ledger and a complete record of all receipts and all disbursements of funds
      + Maintain records for items that are purchased, produced, or distributed through grant activities
      + Maintain a separation of duties for handling funds so no one person is solely in control of them
      + Retain grant documents in a location known by and accessible to club and district officers
      + Retain grant documents for a minimum of five years, or longer if required by local law

# CONFLICTS OF INTEREST

Any real or perceived conflicts of interest must be disclosed during the grant application process, in compliance with The Rotary Foundation’s Conflict of Interest Policy for Grants in the Terms and Conditions for Rotary Foundation Global Grants. A conflict of interest occurs when someone is in a position to make or influence a decision about a grant that could benefit them, their family, their business, or an entity in which they serve in a paid or voluntary leadership or advisory position. This includes any instances of Rotary members acting as vendors or serving as trustees, directors, officers, or staff of one of the Organizations. If in doubt, any potential conflict should be disclosed.

Identify any real or perceived conflicts here:

[Names, roles]

# MODIFICATION

Modifications to this document will be made by mutual consent of the parties. A written modification, signed and dated by all parties and approved by Rotary District 5240 must be issued before acting on any changes.

# CONTACT INFORMATION

Your privacy is important Rotary. The personal data you share with Rotary will only be used for official Rotary business, such as in relation to the Rotary Grant. Personal data collected on this form is subject to [Rotary’s privacy policy](https://my.rotary.org/en/privacy-policy).

# AUTHORIZATIONS

By signing below, the parties agree to the terms of this memorandum of understanding. Rotary Club authorization:

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: | Date |
| Printed Name: | Printed Name | Position: | Position |
| Postal Address: | Postal Address |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Phone: | Phone | Email: | Email |

Organization 1 authorization:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Signature: | Date: | | | Date |
| Printed Name: | | Printed Name | Position: | Position |
| Postal Address: | | Postal Address |  |  |
| Phone: | Phone | Email: | Email |  |

Organization 2 authorization:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Signature: | Date: | | | Date |
| Printed Name: | | Printed Name | Position: | Position |
| Postal Address: | | Postal Address |  |  |
| Phone: | Phone | Email: | Email |  |

TIPS FOR COMPLETING THIS FORM

# GENERAL

If you’re working with just one organization, provide information for Organization 1 only. Always include the Rotary Club

# PROJECT OBJECTIVES

In this section, project partners outline the overall goals of the project that all partners hope to achieve together.

For example:

* Improve the quality of education students receive at Community Primary School
* Improve the quality of care for cancer patients at Community Hospital
* Increase farmers’ yields by 10% through drip irrigation

# RESPONSIBILITIES SECTIONS

Meeting with all project partners to assign responsibilities and record them in writing can prevent conflicts and increase your project’s chances of success. It helps ensure that everyone agrees on the basics of the project plan and prevents confusion during implementation. When you define the responsibilities of each partner, carefully consider their resources and skills. Remember that each project has its own unique roles and responsibilities that are essential for effective implementation. List detailed and specific responsibilities for your project.

Questions to consider when determining responsibilities:

* Who will provide technical and professional services? What specific services will be provided, or what specific skills are needed?
* What types of staffing, infrastructure, or equipment are required, and who will provide those?
* Who will provide training, mentoring, education, advocacy, and financial review?
* Who will direct and coordinate local community education and public relations?
* Who will seek community support and resources for the project?
* Who will manage the funds and pay suppliers, vendors, and contractors?
* Will cooperating organizations submit itemized expense statements and receipts before they receive grant funds?
* Who will direct and coordinate fundraising efforts?
* Who will pay for long-term equipment maintenance, operations, programming, and staffing if needed?
* Who will prepare Rotary Grant reports? Who will collaborate on reporting?
* How will financial records be stored? Who will maintain these records? What is the document retention plan?
* Who will measure and evaluate the project’s outcomes? How will they do this? Who will collect the results? How will the outcomes be shared?

# MUTUAL UNDERSTANDINGS

Do not make any changes to this section without consulting with the District 5240 District Grants Subcommittee

# AUTHORIZATIONS

Make sure that all parties have signed the MOU. If any signature is missing, it will be considered incomplete. Each sponsor and organization should decide who will represent it as a signatory.

If you have any concerns or questions, contact the District 5240 District Grants Subcommittee.