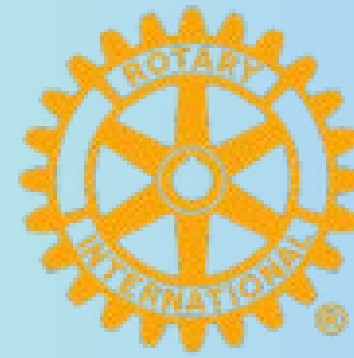
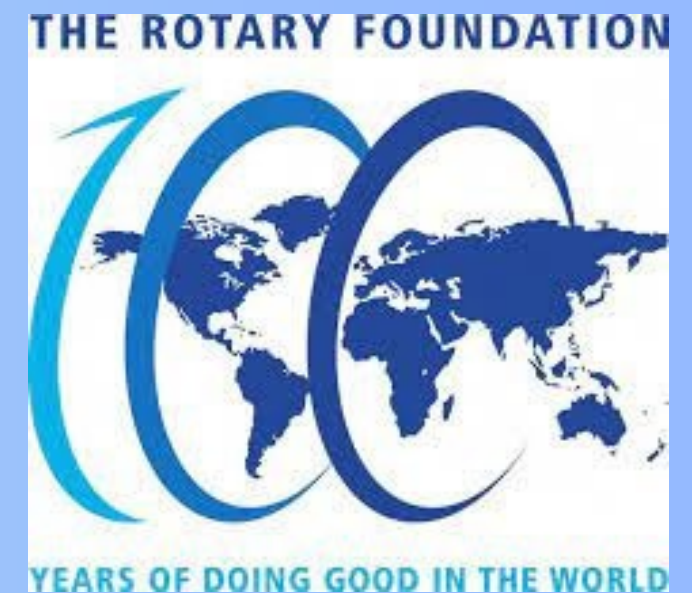


Rotary
District 5280



**UNITE
FOR
GOOD**

RI DISTRICT 5280 MOU



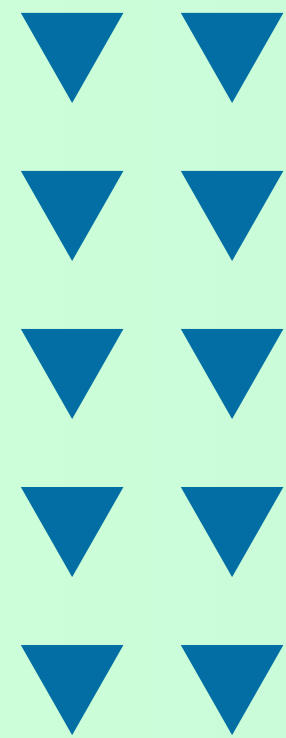
Doing Good in the World



Club **M**emorandum **O**f
Understanding Certification

Topics for today:

- Who is Qualified for a Grant?
- Club Officers Responsibilities
- Financial Management Plan
- Bank Account Requirements
- Reporting
- Documentation
- Reporting on Misuse of Grant Funds
- Memorandum of Understanding



Brief History:



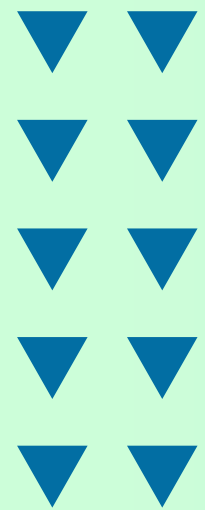
- The Rotary Foundation | TRF was formed in **1917**
- Rotary's #1 priority is the **Eradication of Polio**
- The mission of The Rotary Foundation is to advance world understanding, goodwill and peace through the improvement of health, the support of education and alleviation of poverty
- How do we accomplish this mission?
- One of the ways is through GRANTS that fund your Club's Humanitarian projects



Who Qualifies For A Grant?



Clubs MUST fulfill **ALL OF THE FOLLOWING** to qualify:



1. CURRENT with Rotary International and District dues
2. **Club Goals should be entered in the MyRotary section of rotary.org**
3. Agree to implement the financial and stewardship requirements in this Memorandum Of Understanding (MOU)
4. Send at least TWO or more Club members to the District's MOU Session at the District Assembly **OR** have at least TWO or more Club member(s) take the Online MOU Session.
5. Take the MOU test.

The CLUB 2025 -2026 PRESIDENT, CLUB 2026 -2027 PRESIDENT -ELECT, AND MOU ATTENDEE MUST SIGN THE DISTRICT MOU.

After ALL Of The Requirements Are Fulfilled..

- Your club is now qualified for **ONE ROTARY YEAR**
- **Members Must Re -Certify Each Year**
- To maintain qualified status, the Club must comply with this **MOU**, any additional District requirements, and all applicable TRF policies.
- The Club is responsible for the use of funds for Club-sponsored Grants, regardless of who controls the funds
- Disclose all conflicts of interest
- The Club must cooperate with any financial, grant, or operational audits and/or reviews



Club Officer's Responsibility

THE CLUB OFFICERS HOLD PRIMARY RESPONSIBILITY FOR CLUB QUALIFICATION AND THE PROPER IMPLEMENTATION OF TRF GRANTS

Club Officers' Responsibilities Include:

- ▼ ▼ a. Appointing at least **TWO** Club members to be certified to implement, manage, and maintain club qualification.
- ▼ ▼ b. Ensuring that all 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 have a written financial management plan
 - ▼ ▼ to provide 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



Financial Management Plan



d. Establish an inventory system for equipment and other assets purchased with grant funds, (if needed) and maintain records for items that are purchased, produced or distributed through grant activities

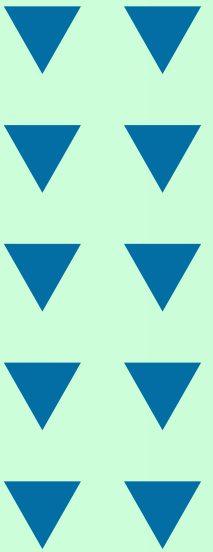


e. Ensure that all grant activities, including the conversion of funds and comply with local law

Bank Account Requirements

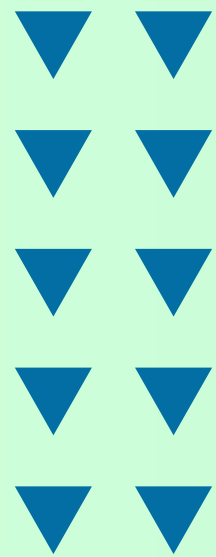
In order to receive specified grant funds, the club must have a dedicated bank account that is used solely for receiving and disbursing grant funds:

NOTE: Only Global Grants host club require a dedicated bank account.

- 
1. The club bank account must:
 - a. Have a minimum of two Rotarian signatories from the club for disbursements
 - b. Be a low, or non-interest-bearing account
 2. Any interest earned must be documented and used for eligible, approved grant activities or returned

Bank Account Requirements

3. A separate account should be opened **for each club sponsored grant** and the name of the account should clearly identify its use for grant funds * see note above *



4. Grant funds may not be deposited in investment accounts including, but not limited to; mutual funds, certificates of deposit, bonds and stocks

5. Bank statements must be available to support receipts and use of grant funds

6. The club must maintain a written plan for transferring custody of any discontinued accounts in the event of a change in signatories.

Report on the Use of Grant Funds

- The club must adhere to all reporting procedures and requirements.
- Grant reporting is a key aspect of grant management and stewardship, as it informs District 5280 and/or TRF of the grant's progress and how funds are spent.



Document Retention

The club must establish and maintain an appropriate record-keeping system to preserve all essential documents related to qualification and 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:

- Bank information, including copies of past statements.
- Club qualification documents including a copy of the signed District MOU.

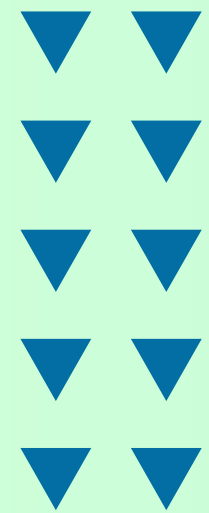
Document Retention

- Documented plans and procedures, including:
 - Financial management plan
 - Procedure for storing documents and archives
 - Succession plan for bank account signatories and retention of information and documentation
- Information related to grants, including receipts and invoices for all purchases

B. Club record 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

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.



Memorandum Of Understanding



This Memorandum Of Understanding is an agreement between the Club and RI District 5280 and acknowledges that the Club will undertake measures to ensure the proper implementation of Grant activities and proper management of The Rotary Foundation grant funds



By authorizing this document, the Club agrees to comply with all of the conditions and requirements of the District MOU.

Questions & Answers



When was The Rotary Foundation (TRF) formed? **1917**

What is the Rotary's #1 Priority?
Eradication of Polio

How long is a club's MOU?
1 Year



Questions & Answers

How many club members should attend the MOU training? **At LEAST 2 Club Members**

Who are the three Club Members that MUST sign the MOU?

- a. Incoming Club President,
- b. Incoming President -Elect and
- c. Club member attending the MOU certification training for that Rotary year



Questions & Answers



How many club members should attend the MOU training? **At LEAST 2 Club Members**

Who are the three Club Members that MUST sign the MOU?

- a. Incoming Club President,
- b. Incoming President -Elect and
- c. Club member attending the MOU certification training for that Rotary year



MOU Procedure IF: Attending the IN -PERSON Session



Fill out Attendance Sheet at District
Assembly

The attendee will receive the MOU Certification Form for signature
via DocuSign.

Once completed, the form will be returned to the District and
forwarded to the Incoming President for signature.



Your **Incoming President** will receive the form via DocuSign for
signature.

Once signed, it will automatically be forwarded to the Incoming
President-Elect for their signature.

All signatures must be submitted to the District by **June 30** to complete MOU
certification.

Each club must have two certified members to be **QUALIFIED** for grants.

MOU Procedure IF: Attending the ONLINE Session



You **MUST** answer ALL of the multiple-choice questions at the end of the Webinar.
This is your record of attendance.

The MOU attendee will receive the MOU Certification Form via DocuSign for signature.
Once signed, the form will be returned to the District and forwarded to the Incoming President for their signature.

Your **Incoming President** will receive the form via DocuSign for signature.
Once signed, it will automatically be forwarded to the Incoming President-Elect for their signature.

All signatures must be submitted to the District by **June 30** to complete MOU certification.

Each club must have two certified members to be **QUALIFIED** for grants.



Important Dates to Remember:



May 19 - June 7th – Online MOU training is available

June 30 - All DocuSign must be submitted and received by the District.

July 10 (tentative) – District Grant Module is Open for grant submission.

Important Dates to Remember: (For District & Vocational Grants)



October 30, 2025 – Deadline for District Community Grant and District Vocational Grant Application Submissions

December 31, 2025 - All Grants must be approved, club contribution received and grant “funded”.

May 1, 2026 – Deadline for closing ALL District Grants.



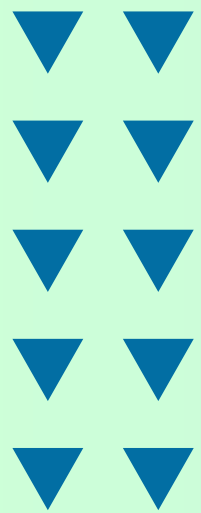
Why is May 1 Closing Date Critical?

Once ALL District Grants are Closed, there are several Reports that need to be completed by the DRFC (District Rotary Foundation Chair) & sent to RI. These reports secure our DDF funds for the new Rotary year, to support all our grants.

One club late in closing their grant can hold up ALL the funding for the ENTIRE district!



Can A Club Be Disqualified From A GRANT?



YES. 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 – follow The Four Way Test

Next Steps

Take the MOU Online Questions, this is your verification of attendance to the MOU Training.

Click on the link: (Or copy and paste it into your browser)

<https://docs.google.com/forms/d/e/1FAIpQLSdZ106Resaws7cOb8hUv9ptah7PKuFCcWy-L089I-XLghYXQA/viewform>

After you complete the MOU Online Questions
You will receive a DocuSign email to sign the MOU Certification.
MOU Certification requires 3 signatures. All required signatories
must sign the DocuSign by June 30, 2025.



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