

Rotary District 6000

Grant Rules, Scoring and MOU

Requirements

In the following pages there are:

1. To be signed by the appropriate club members
 - a. Grant Rules for D6000 for a club to be qualified.
 - b. Grant Scoring for D6000
 - c. Club Memorandum of Understanding (MOU)
 - d. Addendum to the MOU

For any club in D6000 to receive District Designated Funds (DDF) for District Grants, the club must be qualified.

1. **Before applying for a Community Service Grant, a club must be qualified by completing the following steps set up by D6000 CSG Co-Chairs:**
 - a. **Attend a GMLS (Grant Management Learning Seminar) offered by the D6000 CSG Committee.**
 - b. **Signed MOU by all required parties of club, uploaded to Grant portal site [and](#) communicate to D6000 CSG Co-Chairs **BY May 1, 2024.****
 - c. **Club must submit the following 3 annuals goals: Membership, The Rotary Foundation Annual Fund Giving, and PolioPlus Giving **BY May 1, 2024.****
2. **Projects must take place within the geographical boundaries of District 6000.**
3. **Be current on its Rotary International and District 6000 dues, and be in good standing with the District 6000, Rotary International, and The Rotary Foundation.**
4. **A club may fund up to 25% of the project budget with sweat equity.**
5. **A club may apply for a maximum of \$5000.**
 - a. **A club must match grant funds 1:1 with club funds (or equivalent)**

Community Service Grant Program Score Breakdown (100 points total to earn)

- 1. Benefit to Others (1-30 points total)**
 - a. Community Benefit (1 - 20 points)**
 - i. Sustainable Positive Impact on the Local community.**
 - ii. Describe the POSITIVE IMPACT to the Local community.**
 - b. Community Underserved / Disadvantaged (1 – 10 points)**
 - i. Defined as providing a need or service to those who otherwise would not have the opportunity to attain or enjoy the benefit provided by the club project.**
 - ii. How will the project impact those individuals in the community? How will the community impact be measured? Is the project tangible and is it sustainable?**
- 2. Rotary's Public Image (1-20 points)**
 - a. Temporary / Permanent**
 - i. Two categories provide the club with credit for projects which may not be able to utilize permanent signage while emphasizing the positive long-term impact for those projects where it is an alternative.**
 - ii. ENSURE your project has prominent and visible signage, indicating Rotary's support of the project. Rotary logos should be of the correct colors and the correct Rotary wheel should be used (www.brandcenter.rotary.org.)**
- 3. Club Engagement (1 – 20 points)**
 - a. Monetary Contribution / Member Engagement (includes sweat equity)**
 - i. Two categories provide the club with credit for projects whereby there is not a potential for member involvement while also providing credit for a club that contributes through member participation for community awareness.**
 - ii. Encourage Club Members to get involved in the project through sweat equity. By getting Club Members involved, it can generate excitement and buy in among Club Members.**
- 4. Club Support to TRF Annual Fund (1 – 30 points)**
 - a. Rotary suggests that Every Rotarian Every Year (EREY) contribute \$100 annually to The Rotary Foundation to support local and international projects to benefit third parties.**
 - i. Encourage Club Members to donate regularly to the Rotary Foundation. These funds come back to District 6000 through DDF, District designated funds. (i.e.) Think of contributions to your personal checking account. You have to make deposits in order to make withdrawals.**
 - ii. It becomes a point of emphasis that without "some" contributions to the foundation, club's grants will not be fully funded or there will not be grant funds available to award individual clubs. Clubs with higher rates of contributions to TRF score better in this category than Clubs that do not support TRF.**

ROTARY DISTRICT 6000

2024-2025 CLUB MEMORANDUM OF UNDERSTANDING

This document is the official Memorandum of Understanding (MOU) provided by The Rotary Foundation (TRF). It is an agreement between the club and its district to implement the financial and stewardship requirements in this MOU and to ensure proper implementation and management of Rotary Foundation Global Grant Funds and District Grant Funds. By executing this document, the club agrees that it will comply with all Foundation and District requirements.

District 6000 has directed that clubs must be “qualified” to receive grant funds from the Rotary Foundation District Block Grant and each “qualified” club will be held responsible for implementing this club MOU. The sections of this MOU are:

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 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.

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

To receive Global Grant funds, the club must have a dedicated bank account that is used solely for receiving and disbursing TRF grant funds.

- A. The club bank account must:
 - 1. Have a minimum of two Rotarian signatories from the club for disbursements
 - 2. Be a low or non-interest-bearing account.
- B. Any interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.
- C. 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. (only applies to global grants).
- D. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.
- E. Bank statements must be available to support receipt and use of TRF grant funds.
- F. The club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.
- G. Clubs are NOT required to have a separate account for receiving **COMMUNITY SERVICE GRANTS FUNDS**. However, all other terms and conditions of this agreement must be adhered to.

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 record keeping 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.

7. Method for Reporting and Resolving 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.

ADDENDUM

2024-2025 CLUB MEMORANDUM OF UNDERSTANDING

For District 6000

This Addendum to The Rotary Foundation (TRF) Club Memorandum of Understanding (MOU) is applicable to Rotary clubs in District 6000 that desire to participate in The Rotary Foundation grant programs. It is an agreement between the Rotary Club and District 6000 describing the procedures the club will undertake to ensure implementation and management of **District Grants and/or Global Grants** in accordance with requirements and procedures approved by The Rotary Foundation and District 6000 and indicating the club's acceptance of those requirements and procedures. As authorized by The Rotary Foundation, District 6000 has established the following terms and conditions.

1. Club Qualification

To participate in **Global Grants** (international) and **District Grants** (within District 6000 boundaries), District 6000 clubs must agree to the following stewardship and financial requirements.

- A. Send the club president-elect or at least one designated member to a District 6000 Grant Management Seminar each year for grant qualification and management training.
- B. Approve and comply with the MOU of The Rotary Foundation.
- C. Approve and comply with this Addendum to The Rotary Foundation MOU.
- D. Accept responsibility for the use of grant funds for club-sponsored projects regardless of who controls the funds.
- E. Understand that 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 or use of grant funds for ineligible purposes.
- F. Cooperate with any financial, grant or operational review or audit.

2. Club Officer Responsibilities

Club officers have primary responsibility for club qualification and proper implementation of **Global Grants** and **District Grants** including:

- A. Appointing the club president-elect or at least one designated member to implement, manage and maintain club qualification.
- B. Ensuring that all TRF grants adhere to proper stewardship measures and management practices.
- C. Ensuring that all individuals involved in grants conduct their activities to avoid any actual or perceived conflicts of interest.
- D. Ensuring that applications for District Grants are reviewed and approved by the club's Assistant Governor prior to submission to the District Grants Committee.
- E. Ensuring that applications for Global Grants are reviewed and approved by the appropriate Regional Coordinator and submitted for approval by the Global Grants Committee before being filed with The Rotary Foundation.

3. Financial Management Plan

The club must have a financial management plan to provide consistent administration of **District Grant** funds with procedures to:

- A. Maintain a complete record of all receipts and disbursements of grant funds.
- B. Maintain segregation of duties for handling funds;

C. Ensure that all grant activities comply with applicable laws and regulations.

4. Reports on Use of Grant Funds

Grant reporting is a key aspect of grant management and stewardship as it informs TRF and District 6000 of each grant's progress and use of funds. District 6000 has the following expectations.

- A. Global Grant host partners will accept responsibility for preparing and submitting interim reports and final reports. District 6000 international partners will maintain records of reporting schedules and communicate with host partners when reports are due.
- B. A District Grant final report must be submitted within 60 days of project completion OR a communication MUST be sent to the D6000 Co Chairs explaining the delay.
- C. No District Grant funds will be distributed to a club unless its reports are up to date for all of its previous grants.

5. Document Retention

The club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification and grants. Retaining documents supports transparency in grant management and assists preparations for audits and financial reviews.

- A. Documents must be maintained for a minimum of five years.
- B. Documents that must be maintained for District Grants include applications, bank statements, invoices for purchases, receipts for payments, copies of checks, progress reports and final reports.
- C. For Global Grants and District Grants clubs must maintain qualification documents including signed copies of The Rotary Foundation Club Qualification Memorandum of Understanding and the Rotary International District 6000 Addendum to The Rotary Foundation Club Qualification Memorandum of Understanding.

On behalf of the Rotary Club of _____, the undersigned agree to comply with all conditions and requirements of the Grant Rules of D6000, Grant Scoring of D6000, MOU and the addendum MOU for Rotary year _____ and will notify Rotary International District 6000 CSG Co Chairs of any changes or revisions to club policies and procedures related to these requirements.

Club President (2024-25)		Club President Elect (2024-25)	
Name (Printed)		Name (Printed)	
Signature		Signature	
Date		Date	
Club Treasurer (2024-25)		Club Grant Chair (2024-25)	
Name (Printed)		Name (Printed)	
Signature		Signature	
Date		Date	