**Rotary District 7170 2019-2020 District COMMUNITY Grant Application Instructions**

*Please save this page for your records.*

Thank you for your Club’s interest in applying for a District Grant. The Grants Committee looks forward to working with you to improve our communities. Please review the following information, answer the questions and send all but this Instructions page to the Committee Chair, Cindy Burger, [csburger@frontiernet.net](mailto:csburger@frontiernet.net). If you have questions, please email Cindy or call (607) 692-3442 (home) or (607) 644-3760 (cell). Be sure to read and follow the application carefully.

The purpose of District Community Grants is to fund small-scale, short-term activities that address needs in your community. Ideally, your community has identified the need and members of the community should be involved in the project as much as possible**. Your project must follow the mission of The Rotary Foundation which is to improve health, support education and alleviate poverty.** Grant funds cannot be used for the operating expenses of another organization.

Copy the application form to your computer and answer each question with as much detail as possible so that the Committee fully understands what you plan to accomplish. This is a Microsoft Word document so you can enter your information below each question and take as much space as necessary.

The Club President for 2018-2019 and the Club President for 2019-2020 must sign and date the application at the end and submit the signed Memorandum of Understanding which follows the application.

**DO NOT BEGIN YOUR PROJECT UNTIL YOU HAVE RECEIVED OFFICIAL NOTICE FROM THE DISTRICT THAT THE ROTARY FOUNDATION APPROVED THE DISTRICT’S ENTIRE GRANT APPLICATION.** The Committee Chair will contact you by email or phone as soon as possible once The Rotary Foundation sends their approval.

* Once you have received approval to begin, keep receipts of all expenses and take pictures of the project in progress. (Take a “before” picture if applicable.)
* Once your final report is submitted and accepted, the Committee Chair will direct the District Treasurer to release the funds that were approved for your project.

Clubs are welcome to submit more than one application and are encouraged to consider collaborating with other Rotary clubs and other organizations to make a bigger impact. If two Rotary Clubs are involved, each must submit an application.

**Important Dates:**

* Wednesday May 15, 2019 – INITIAL deadline – this will give the Committee Chair time to review the application and let you know if anything is missing
* Friday May 31, 2019 – ABSOLUTE APPLICATION DEADLINE – **applications or related documents received after this date will not be reviewed**
* June 2019 – The District Grants Committee reviews the applications, recommends funding (could be full or partial) and sends one entire application to The Rotary Foundation for approval.
* July or August 2019 – The Committee receives approval from The Rotary Foundation. The Committee Chair will contact you to begin your project.
* Friday January 31, 2020 – Progress Report due.
* Tuesday June 30, 2020 – Final Report due on the District form describing the project with pictures and copies of expense receipts.

**Rotary District 7170 2019-2020 District COMMUNITY Grant Application**

1. Tell us about your club:

* + Name and club number, number of members, where are you located?
  + What has been your club’s previous involvement in community projects?
  + Has your club contributed to The Rotary Foundation?
  + Are your club’s dues to Rotary International paid currently?
  + If you have received a previous grant, are your reports up to date?

2. Describe the project:

* What will be the end result?
* How was it chosen?

3. Who will benefit from the project? How will they benefit?

4. Where will the project take place?

5. When will the project be started and finished? (It should be finished by June 30, 2020).

6. Who will own the project when it is finished? (This cannot be the Club or a Rotarian.)

7. Who, besides Rotarians, will be involved? What will they all do?

8. Is another organization involved? If so, please attach a letter from them confirming the need and their support of the project.

9. How much will the project cost? (Minimum $500 – maximum $2,500) **Provide quotes from suppliers to document the estimated expenses.**

10. Where will the money come from? (List all sources and amounts, including funds from your Club).

If the grant application is only partially funded by the District grant, how will the difference be met?

11. How will this project be maintained and sustained beyond June 30, 2020?

12. If the grant application is approved and the final report accepted, to whom should the reimbursement check be made payable? Include the address (typically the Club)

13. How will you inform and promote the project to the community?

14. At least one Club member must attend a District Grants seminar. These are scheduled for two Saturdays: March 30 (Oneonta) and April 6, 2019 (Dryden). Who attended and when?

15. Oversight Committee: list the names and contact information (address, phone number, email address) of at least three club members who have agreed to oversee the project and be responsible for the expenditure of funds.

**Rotary Club Commitment**

The following signatures of the sponsoring Rotary Club Presidents for 2018-2019 and 2019-2020 confirm that:

a. All information contained in this application is true, accurate and complete, to the best of our knowledge;

b. The Club has agreed to undertake this project as an activity of the Club and other organization (if any) involved;

c. The Club understands and will comply with the required Rotarian activities and reporting requirements as stated;

d. The Club agrees that a Progress Report will be provided by January 31, 2020 and a Final Report no later than June 30, 2020.

Sponsoring Rotary Club of

Date:

Club President 2018-2019 (please print)

Signature

Contact information

Club President 2019-2020 (please print)

Signature

Contact information

District Grant Number (to be entered by the Grants Committee Chair)

**Club Qualification Memorandum of Understanding (MOU)**

**The Rotary Foundation – 2019-2020**

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 district and global 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, and 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 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**

In order to receive 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.

D. Grant funds may not be deposited in investment accounts including, but not limited to: mutual funds, certificates of deposits, 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.

**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 MOU.

3. 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.

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. 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.

**Addendum to the Club Memorandum of Understanding (MOU)**

**Rotary District 7170**

Clubs in District 7170 that wish to participate in District Grants (Community and International) must first become qualified by agreeing to adhere to the following:

1. Attend a District 7170 Grants Management Seminar. (A minimum of two persons is preferred, namely the club president, president-elect, the club’s Foundation or grant chair.)

2. Clubs agree to submit project Progress Reports no later than January 31, 2020. Final Reports are due as soon as possible after completion of the project but no later than June 30, 2020.

3. The final report will include copies of all receipts of expenditures and pictures and/or videos.

4. District grant funds will be paid to the club after submission of the Final Report and its acceptance by the Grants Committee Chair. An exception may only be made upon approval of the Grants Management Chair in consultation with the Grants Committee.

5. No grant application will be accepted for review after May 31, 2019.

Authorization and Agreement

This Memorandum of Understanding (MOU) and its Addendum are an agreement between the Club and District 7170 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 requirement of the MOU.

Club President Club President

Term: 2018-2019 Term: 2019-2020

Name Name

*Please print Please print*

Signature Signature

Date Date

*Please save a copy of this document for your records.*