



# THE ROTARY FOUNDATION 2024-2025 CNY Rotary Memorandum of Understanding

This is a QUALIFYING DOCUMENT

## Club Qualifications:

To participate in Rotary Foundation grants the requesting club must agree to implement the financial and stewardship requirements in this Memorandum of Understanding (MOU) provided by The Rotary Foundation (TRF) and CNY Rotary (District 7180). To participate in Rotary Foundation District Grant, a CNY Rotary Club must be qualified. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year

**\*Please Note:** Club qualification status may be suspended or revoked for the misuse or mismanagement of grant funds involving, but not limited to: fraud, forgery, membership falsification, gross negligence, the endangerment of the health, the welfare, or the safety of beneficiaries, ineligible contributions, use of funds for personal gain, undisclosed conflicts of interest, monopolization of grant funds by individuals, the falsification of any reports, overpricing, acceptance of payments from beneficiaries, illegal activities, and the use of grant funds for ineligible purposes.

## Club Qualifications Checklist:

**Please Note:** All qualification items listed below must be *completed* and *checked-off* prior to the application deadline of June 1, 2024.

List the members of your club who have completed the Grants Management Seminar in the current Rotary year (minimum two members required)

**Name**

**Date Completed**

Cooperate with any financial, grant, or operational audits

Be current on all Rotary International and CNY Rotary/District 7180 dues

Club is current on all applicable grant reports

**Please note:** *If you have any open grants you will need to submit a Final Report and all necessary documentation. If your project is not completed, you will need to submit an Interim Report. All final reports are to be submitted no later than July 31, 2024 via email to grants@cnyrotary.org.*

Club has submitted, or is in the process of submitting, required annual 990 filings with the IRS as a 501(c)(4) organization

## **Club Officer Responsibilities:**

Appoint at least one Club member to implement, manage, and maintain club qualification

Ensure all TRF grants adhere to stewardship measures and proper grant management practices

Ensure all individuals involved in the grant project conduct their activities in a way which avoids any actual or perceived conflict of interest



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## **Reports on Use of Grant Funds:**

The requesting 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. All reports are to be submitted to the CNY Foundation Committee at [grants@cnyrotary.org](mailto:grants@cnyrotary.org)

## **Document Retention:**

The Club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification of TRF grants. Clubs agree to make any documentation related to their grant(s) available to the CNY Foundation Committee upon request. **Documentation must be maintained for a minimum of five years, or longer if required by local law.**

## **Maintained Documentation (including, but not limited to):**

Club qualification documentation; including a copy of this signed club MOU

Documented plans and procedures including: procedures for storing and retaining information, documentation and archives, and a succession plan for bank account signatories

Bank account information, including copies of past statements for Global Grants only.

Information related to grant funds, including receipts and invoices for all purchases

Club records must be accessible and available to Rotarians in the sponsor club, and at the request of the CNY Foundation Committee

## **CNY Rotary Reporting Misuse of Grant Funds:**

If any Rotarian with interest in the project suspects misuse of grants funds, he/she must report allegations in writing to the District Stewardship Chair or, if the alleged misuse involves the Stewardship Chair, to the Foundation Chair and District Governor within twenty-four (24) hours of its knowledge of suspected misuse.

The Stewardship Chair or District Governor as identified above will investigate, report its findings in writing, and attempt to resolve any and all allegations of misuse.

## **Conflicts of Interest:**

The Stewardship Chair or District Governor, as appropriate, has the responsibility of reporting and investigating any and all alleged conflicts of interest, which are reported, or which are discovered.

## **Authorization and Agreement**

This Memorandum of Understanding (MOU) is an agreement between the requesting club and CNY Rotary (District 7180), and acknowledges that the requesting club will undertake measures to ensure the proper implementation of grant activities and proper management of Foundation grant funds. By authorizing this document the requesting club agrees to comply with all of the conditions and requirements set forth herewith.



**THE ROTARY FOUNDATION 2024-2025 CNY Rotary  
Memorandum of Understanding**

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**Submit no later than June 1, 2024, hand signed and emailed to  
grants@cnyrotary.org**

*We, being responsible for administering grant activities for the **Rotary Club of** \_\_\_\_\_, certify that the club will adhere to the requirements listed in this Club Memorandum of Understanding and will notify CNY Rotary of any changes or revisions to club policies and procedures related to these requirements.*

**MEMORANDUM OF UNDERSTANDING**

<b>CURRENT CLUB PRESIDENT</b>	
<b>Term</b>	<b>2023-2024</b>
<b>Name</b>	
<b>Signature</b>	
<b>Date</b>	

<b>CLUB PRESIDENT-ELECT</b>	
<b>Term</b>	<b>2024-2025</b>
<b>Name</b>	
<b>Signature</b>	
<b>Date</b>	

For your convenience, if you are filling out this form on a Windows or Mac PC, the buttons to the right may be used to save or print a copy of your form as well as submit your form via email to grants@cnyrotary.org.  
Note: the EMAIL button will automatically attach this form.