



THE ROTARY FOUNDATION -2023-2024 DISTRICT 7150 Memorandum of Understanding – 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 District 7150. District 7150 has established requirements for club qualification and requires District 7150 clubs to be qualified in order to participate in Rotary Foundation District Grants. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year and eligible to participate in the TRF District Grant program.

***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 May 1, 2023.

- Designate a club Foundation Representative for each year of qualification. This representative, or club-designated appointee, must attend district grant management and qualification training.

Please List:

Club Foundation Representative: _____
Contact Information: Email: _____ **Phone:** _____

Alternate Representative: _____
Contact Information: Email: _____ **Phone:** _____

- Have the above individual(s) attended grant training? Please Check: YES NO
- Acknowledgement of Matching Funds: Clubs must put a minimum of one dollar (\$1.00) of the requesting clubs own funds for every dollar requested towards the project
- Cooperate with any financial, grant, or operational audits
- Be current on all Rotary International and District 7150 dues
- Club President-Elect has attended the President-Elect Training Seminar
- Club has submitted a current and completed IRS 990 form to Rotary International
- 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 fill out the Progress Report.

- Complete and submit this Memorandum of Understanding (MOU) and Addendum to establish and maintain compliance with the Foundation and District 7150

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

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 Auditing Committee.

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 District 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 the signed club MOU and Addendum
- 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 club, and at the request of District 7150

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 District 7150, 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.



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SUBMIT NO LATER THAN May 1, 2023, SIGNED AND EMAILED TO:

Bonnie Levy, District Grants Chair, bonnierotary7150@gmail.com (315) 476-9900 and
Don Reese, District Foundation Chair, dgreese7150@gmail.com, (315) 794-8085

*We, being responsible for administering grant activities for the **Rotary Club of** _____, certify that the club will adhere to the requirements listed in this Addendum to the Club Memorandum of Understanding and will notify Rotary District 7150 of any changes or revisions to club policies and procedures related to these requirements.*

MEMORANDUM OF UNDERSTANDING

CURRENT CLUB PRESIDENT		CLUB PRESIDENT-ELECT	
Term	2022-2023	Term	2023-2024
Name		Name	
Signature		Signature	
Date		Date	

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 both Bonnie Levy and Don Reese.
 Note: the EMAIL button will automatically attach this form.