

Rotary District 7230
Memorandum of Understanding
For
Clubs Applying for
TRF District Grants

This document is an official Memorandum of Understanding (MOU) between Rotary District 7230 and Clubs applying for and/or participating in TRF District Grant Funds. It is an agreement between the local club and the District Rotary Foundation Committee explaining what measures the grant recipient will undertake to ensure proper implementation of grant activities and management of awarded funds. By authorizing this document, the recipient agrees that it will comply with all District requirements.

1. Terms of Qualification

- A. Each Rotary year the district will announce qualification requirements for that year and offer grant training. Upon successful completion of the training, the club will receive qualified status for one 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.
- F. The project must fall under at least one of the 6 Areas of Focus of the Rotary Foundation.

2. Club Officer Responsibilities

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

The recipient must follow financial management procedures that include measures to:

- A. Maintain a complete record of all expenditure receipts and invoices, and copies of disbursements checks. Disbursement checks must tally to the total of receipts and invoices.
- B. Disburse grant funds, as appropriate, to entities as approved in the grant application.
- C. Establish an inventory system for the control of equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities.
- D. Ensure all grant activities are in accordance with local laws.
- E. Ensure that District Grant funds are spent only on eligible expenditures as designated by TRF and approved in the awarding of the grant.

4. Document Retention and Reporting on Use of Grant Funds

- A. All records, documentation, application, accounting and reporting associated with the awarded grant must be retained by the recipient for a period of five years and be easily accessible for review by the district.
- B. The recipient must submit a final report along with copies of all receipts and invoices, and copies of all disbursement checks to the district by the grant deadline. A copy of the final report form is attached.
- C. The club must report any changes in project funding, potential misuse or irregularities in grant-related activities to the district.

5. Duration of TRF District Grant Projects

- A. The project cannot begin prior to the Rotary year in which the grant is awarded. The project cannot be a repeat project or an ongoing project.
- B. The project must be completed before the end of Rotary year 2017/18 unless an extension is specified at the time of the awarding of the grant.
- C. The transfer of grant funds to the awarded club will be upon receipt of the final report and all expense and disbursement documentation.

6. Authorization and Agreement

To the best of my knowledge and belief, except as disclosed herewith, neither I nor any person with whom I have or had a personal or business relationship is engaged, or intends to engage, in benefiting from TRF grant funds or has any interest that may

represent a potential competing or conflicting interest. A conflict of interest is defined as a situation in which a Rotarian, in relationship to an outside organization, is in a position to influence the spending of TRF grant funds, or influence decisions in ways that could lead directly or indirectly to financial gain for the Rotarian, a business colleague, or his or her family, or give improper advantage to others to the detriment of TRF. Any and all exceptions must be explained in an attached statement.

*We being responsible for administering grant activities for the **Rotary Club of** _____ *certify that the recipient adheres to the requirements listed in this Memorandum of Understanding and will notify Rotary International **District 7230** of any changes or revisions to the recipient's policies and procedures related to these requirements.**

Club Officer

Certified Club Member

NAME

NAME

SIGNATURE

SIGNATURE

OFFICE

DATE

DATE

EMAIL

EMAIL