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## **Rotary District 7620 Memorandum of Understanding 2023-2024**

This Memorandum of Understanding (MOU) is an agreement between Rotary International District 7620 (District 7620) and District 7620 Rotary Club of \_\_\_\_\_ (Grant Applicant) which intends to apply for community and / or global District Designated Funds (DDF) from The Rotary Foundation (TRF). This MOU sets forth the measures the Grant Applicant will undertake to ensure proper implementation of grant activities and management of awarded funds. By signing this document, the Grant Applicant agrees that it will comply with all District 7620 requirements.

### 1. Terms of Qualification

Upon successful completion of the grant qualification requirements, the Grant Applicant will receive qualified status for a one-year period: July 1, 2023-June 30, 2024.

By entering into this Agreement and receiving DDF, the Grant Applicant understands and confirms that it is responsible for the use of the grant funds.

The Grant Applicant must disclose any possible conflicts of interest and comply with the Conflict of Interest Policy for Grants Participants, as outlined in Section 7.030 of the Rotary Foundation Code of Policies.

The Grant Applicant must comply with all District 7620 application and management requirements, which are set forth in the DACdb funding module.

The DDF-funded project must fall under at least one of the seven TRF Areas of Focus.

### 2. Threshold Eligibility Requirements for Applicants

A. For a Grant Applicant to be eligible to receive DDF funding, the TRF's "Club Foundation Analysis Report" must reflect by June 30, 2023 the below accomplishments:

- **\$120** per capita minimum of club membership total giving to the Annual Fund.
- **70%** of club members contribute **\$25** to the Annual Fund.

- 50% of club members are a Paul Harris Fellow.

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- \$5,000 maximum DDF Match per eligible club for single grant, or the total of multiple District 7620 Rotary Club requests must NOT exceed 15% of the total District DDF money available for each Rotary fiscal year, unless approved in advance by the District Rotary Foundation Chair (DRFC). Further, TRF policies state that the DRFC may not approve amounts to exceed 20% of total DDF available for each Rotary fiscal year.
- Each Grant Applicant may only have two District grants ongoing at any one time and cannot be delinquent in reporting on any TRF funded grant.
- **Newly chartered Clubs are exempt from grant eligibility requirements for one full rotary year for a small capacity building grant.**

B. Each Grant Applicant must have a Club Rotary Foundation Chair who is responsible for ensuring that the Grant Applicant meets and maintains the qualifications to receive DDF grants and that the proper grant management practices are implemented. If the Grant Applicant has a 501(c) (3) foundation, the Rotary Foundation Chair should not be the Grant Applicant's 501(c)(3) foundation chair.

C. The President of the Grant Applicant club and the Club Rotary Foundation Chair who will both be serving during the Rotary year 2023-2024, or another club leader **must** attend both parts of the DACdb grant module and Foundation training arranged by District 7620, and remain current on District 7620 grant requirements for the term of the grant. Such training includes:

(1) **Learning the Mechanics of The Rotary Foundation** —

How the TRF works and why it is the “engine” that drives our District’s giving: Scheduled on the first Tuesday of each month unless notified otherwise.

(2) **Be Prepared to Apply for District Grants** — Understanding the Memorandum of Understanding (MOU) for community and global grants, including eligibility; where to apply; tips for filling out the application and maximizing funding potential.

(3) **Be Prepared to Apply for Global Grants** — Where and how to apply; tips for filling out the application and maximizing funding potential.

3. **Financial Management**

The Grant Applicant must follow financial management procedures that include measures to:

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Maintain a complete record of all receipts and disbursements and receipts for all expenditures related to the grant project. These project documents must be downloaded into the grant project file in the DACdb Grant Module.

Disburse in a timely manner all grant funds, as appropriate, to entities as approved in the grant application.

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.

Maintain a plan for transferring the custody of the grant funds in the event of a change in leadership.

Ensure all grant activities, including the conversion of funds, are in accordance with local laws. District 7620 DDF grant funds will only be spent 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

All records, documentation, application, accounting and reporting associated with the awarded grant must be appropriately and completely entered in the DACdb Grants Module project file prior to the grant deadline, but, in any event, no later than midnight on **May 30** of each Rotary year.

The Grant Applicant must report immediately any changes in project funding and potential misuse or irregularities in grant-related activities to the DRFC.

#### 5. Fund Distribution and Duration of TRF District 7620 Grant Projects

Understanding the application and submission criteria is **NOT a first-come-first-serve policy**. A metric used by the Sub-grants committee recommendation for grant approval will reflect, but not limited to, quality writing that demonstrates the project is sustainable, is measurable, is impactful, is it specific, is attainable and is relevant in our local communities and around the world.

No project receiving DDF can begin prior to the Grant Applicant being notified by the DRFC of the amount of their awarded funds.

No funds can be expended prior to award notification, and no grant funds can be used to reimburse costs incurred prior to award notification.

All funded projects **MUST** be completed, and a “Final Report” submitted to the chair of the District Grants Committee and approved by midnight on **May 15, 2024**, following the awarding of the grant, unless an extension is requested and approved in writing at the time of the grant award.

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Failure to submit the report in a timely manner may jeopardize future grant approvals for the next Rotary year.

District 7620 will pay 50% of the approved grant amount upon review and final approval of the project by the DRFC.

District 7620 will pay the remaining 50% of the approved grant amount upon completion of all reporting requirements by the Grant Applicant to the DRFC.

6. Authorization and Agreement

We, being responsible for administering grant activities for the Rotary Club of \_\_\_\_\_, certify that the Grant Applicant will adhere to the requirements of this MOU, and will notify District 7620 DFRC of any changes to the approved project related to these requirements.

**Club President /Club Rotary Foundation Chair** (Term 2023-2024)

\_\_\_\_\_

NAMES (PRINTED)

\_\_\_\_\_

SIGNATURES

\_\_\_\_\_ DATE

District 7620 Rotary Foundation Chair

\_\_\_\_\_ PRINTED NAME

DATE

\_\_\_\_\_

SIGNATURE

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