



Rotary District 7620 2024-25 Memorandum of Understanding

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

1. Terms of Qualification

- A. Upon successful completion of the grant qualification requirements as set forth in Sections 2 below, the Grant Applicant will receive qualified status from the District Rotary Foundation Chair (DRFC) for a one-year period: July 1, 2024 - June 30, 2025.
- B. The Grant Applicant agrees to disclose any possible conflicts of interest and comply with the Conflict of Interest Policy for Grants Participants, as set forth in Section 7.030 of The Rotary Foundation Code of Policies.
- C. The Grant Applicant agrees to comply with all District 7620 application and management requirements which are delineated in the DACdb Grant Module or My Rotary Grant Center, as applicable, Grant Training (see Section 2.C. below), District 7620 website, and Terms and Conditions for Rotary Foundation District Grants or Global Grants, as applicable.

2. Threshold Eligibility Requirements for Grant Applicants

- A. For a Grant Applicant to be eligible to receive DDF funding, the TRF's "Club Foundation Banner Report" must reflect by June 30, 2024, the below accomplishments:
 - i. \$100 per capita minimum of club membership total giving to the Annual Fund or Polio Plus.
 - ii. 70% of club members contribute \$25 to the Annual Fund. Note that this Every Rotarian Every Year (EREY) requirement counts toward the per capita minimum in i. above.
 - iii. 50% of club members are Paul Harris Fellows.

Newly chartered Clubs and Rotaract clubs are exempt from these grant eligibility requirements for one full Rotary year for a small capacity-building grant.

- B. Each Grant Applicant agrees to 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.

C. The President of the Grant Applicant and the Club Rotary Foundation Chair who will both be serving during the Rotary year 2024-2025, or their designee, must attend the Grant Training presented by the District 7620 DRFC at announced times and remain current on District 7620 grant requirements for the term of the grant. Such training, which will be presented in a combined session, includes:

Part 1- Learning the Mechanics of The Rotary Foundation — How the TRF works and why it is the “engine” that drives our District’s giving.

Part II – Grant applications for District and Global 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. Grant Terms

A. General terms applicable to both District community and Global Grants:

- i. DDF is a 1:1 matching dollar request, e.g., if asking for \$1,000 from District 7620, the qualified Club or its Foundation must provide at least \$1,000.
- ii. The maximum DDF match per qualified Club for a single grant is \$5,000, unless an exception is made by the DRFC based on the availability of funds and quality of the application.
- iii. The maximum DDF match per single grant is 15% of the available DDF, unless an exception is made by the DRFC based on the availability of funds and quality of the application.
- iv. No project may begin, and no funds can be expended prior to award notification; no grant funds can be used to reimburse costs incurred prior to award notification by the DRFC for District community Grants and RI for Global Grants.
- v. The DDF-funded project must fall under at least one of the seven TRF Areas of Focus.

B. Additional Terms Applicable to District community Grants:

- i. Grant application submission is only acceptable electronically via the DACdb Grants Module.
- ii. The window for District community grant applications to be submitted to District 7620 for Rotary Year 2024-25 is March 1, 2024, through May 31, 2024. If funds are still available after the first round of approved matching grants, clubs may submit additional grant applications pursuant to announcements by the DRFC.
- iii. Grant applications will be evaluated in accordance with the District 7620 Grant Guidelines and must be approved by the DRFC prior to the beginning of the project.
- iv. The total of multiple District 7620 DDF requests from a single Rotary Club for District community grants may not exceed 15% of the total District Community DDF money

available for the Rotary fiscal year unless approved by the DRFC based on the availability of funds and quality of the application.

- v. Clubs with approved District community grants will receive 50% of their grant matching funds as soon as District 7620 receives its 2024-25 DDF allotment from The Rotary Foundation. The remaining 50% will be paid upon the completion and approval of the grant reporting requirements (the Final Report).
 - vi. All funds must be expended and a compliant Final Report, including detailed explanation of expenditures, must be submitted in DACdb by May 15, 2024.
- C. Additional Terms Applicable to Global Grants
- i. Grant application submission is only acceptable electronically via the Grants Center in My Rotary.
 - ii. The window for Global grant applications submission to District 7620 for Rotary Year 2024-2025 commences July 1, 2024. Applications will be accepted by the District provided Global DDF is available.
 - iii. Global matching DDF from the District must be approved by the DRFC in writing. Applications for Global Grants drafted in My Rotary Grants Center may not include District 7620 DDF prior to obtaining specific approval by the DRFC of the amount being requested.
 - iv. The total of multiple District 7620 DDF requests from a single Rotary Club for Global grants may not exceed 15% of the total District Global DDF money available for the Rotary fiscal year unless approved by the DRFC based on the availability of funds and quality of the application.
 - v. Funding of the approved DDF and Final Report requirements will be in accordance with the Terms and Conditions for Rotary Foundation Global Grants.

4. Financial and Program Management

- A. The Grant Applicant agrees to follow financial procedures that include measures to:
- i. Maintain a complete record of all receipts and disbursements for all expenditures related to the grant. These financial documents must be downloaded into the grant project file in the DACdb Grant Module for District community grants, and in The Grants Center for Global Grants.
 - ii. Disburse in a timely manner all grant funds, as appropriate, to entities as approved in the grant application.
 - iii. 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.
 - iv. Maintain a plan for transferring the custody of the grant funds in the event of a change in leadership.

- v. 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.
- B. The Grant Applicant agrees to follow program and document retention procedures that include measures to:
- i. Retain all programmatic records, documentation and reporting associated with the grant
 - ii. Submit the Final Report in the DACdb Grants Module no later than midnight on May 15, 2025, for District community grants and in the Rotary Grants Center by the RI designated deadline for the Global Grant. Failure to submit any Final Report in a timely manner will jeopardize DDF payments and future grant approvals.
 - iii. Ensure that any changes in project funding or scope and potential misuse or irregularities in grant-related activities are reported immediately to the DRFC.

5. Authorization and Agreement

The undersigned, being responsible for administering grant activities for the Rotary Club of _____, certify that the Grant Applicant will adhere to the terms of this MOU.

Club President / President Elect
(Term 2024-2025)

Club Rotary Foundation/Grants Chair
(Term 2024-2025)

PRINTED NAME

PRINTED NAME

SIGNATURE

SIGNATURE

DATE

DATE

District 7620 Rotary Foundation Chair

PRINTED NAME

SIGNATURE

DATE