**Cooperating Organizations and Memos of Understanding (MOU’s)**

Rotary International (RI) recognizes that clubs cannot always do everything associated with a project on their own and that they will need help from a cooperating organization. The *Guide to Global Grants* document offers the following comments concerning Cooperating Organizations:

“Collaborating with another organization can enhance the quality and effectiveness of your project. A cooperating organization can provide technical expertise, advocacy, training, education, or other support. **If you work with a cooperating organization, both club(s) and the organization must complete a Cooperating Organization Memorandum of Understanding (MOU) before beginning your project.** Although other organizations and volunteers may play a large role, the project sponsors are ultimately responsible for the financial management of the grant and for ensuring that the project achieves its intended results.”

District 6710 has tried to streamline this process by developing a template MS-Word document for completing MOU’s. This training will outline how to complete the MOU document and upload it to your club’s district grant on-line application.

The MOU template is straightforward. All the inputs required are formatted as all CAPS in parenthesis, for example – [LEAD ROTARY CLUB], [COOPERATING ORGANIZATION], etc. This training will provide tips and suggestions for the inputs required.

1. Subject – [NAME OF THE GRANT] In naming your grant, you should keep the name simple but add wording that will assist search engines and other distinguishing criteria. A grant entitled “Scholarships”, for example, would be more difficult to find than one named “Scholarships for Carroll County Students to JTCT.”
2. Purpose – No input is required for this section.
3. Primary Contacts – Information for the [ROTARY PARTNER] and the [COOPERATING ORGANIZATION] is entered in this table. The contact information for the individual signing the MOU for the Cooperating Organization should be listed. The club president or other club officer should be listed for the Rotary Partner.

**Note:** If the person listed for the Cooperating Organization is a Rotarian or if the Rotary Partner listed is affiliated with the Cooperating Organization, a conflict of interest letter will be required to certify that no conflict of interest exists.

1. Understandings – Statements A through H are boilerplate RI requirements for global and/or district grants. Make sure the [Identifications] are the same throughout the document. Some Cooperating Organizations may be concerned about the review/audit provisions of Statement H. These reviews and/or audits are limited to activities associated with the grant project, not a full audit of the organization.
2. The [ROTARY PARTNER] shall section is most important. All the tasks and functions to be done by the Rotary Club Partner should be listed including the funding, who will do the work specified, and how the project will be publicized. Specific names are not required since the club will be responsible for the activities.
3. The [COOPERATING ORGANIZATION] shall is also important. All the tasks and functions to be done by the Cooperating Organization should be listed. This includes fund raising, doing the physical work, checking with governmental agencies, etc. A complete outline of the expectations for each partner is vital to the success of any project. If there is any dispute about what went wrong with a project, this document will serve as the primary reference.
4. Modifications – This section allows for changes to the grant project that come up during its execution. These can be amendments to the original MOU signed off by both parties and attached to the original MOU.
5. Conflict of Interest – If any Rotarian or person associated with a project has the potential for a conflict of interest, the conflict must be disclosed and addressed with a letter. A sample letter is attached to this procedure.
6. Signatures are required for each MOU. The original should be kept at the Rotary Partner’s office. The official title of the Cooperating Organization signer should be indicated in the block below the signature. The club president should sign for the club. Copies of the signed document should be scanned and saved in PDF format for attaching to emails and uploading to DACdb.

The Memo of Understanding for Global Grants is essentially the same as outlined for District Grants with one exception. For Global Grants there will be three partners listed throughout the document. The Host Club is the club where the project will take place. The International Club is the club that will be leading the project, doing the fund-raising, and generally managing the bank account and all the activities associated with the project. If there is more than one Cooperating Organization, an MOU will be needed for each organization and signed off by both Rotary clubs. The latest MOU template from Rotary International includes two cooperating organizations in one document.





