

Rotary District 7170 2023-2024 District INTERNATIONAL Grant Application Instructions

Please keep this page for your records.

Thank you for your club's interest in applying for a District Grant. The Grants Committee looks forward to working with you to improve our communities. Please review the following information, answer the questions and send all but this Instructions page to the Committee Chair, Catrina Ruling at 7170districtgrants@gmail.com. If you have questions please email Catrina Ruling at 7170districtgrants@gmail.com or call (607) 353-5995. **Be sure to read and follow the application carefully.**

The purpose of District International Grants is to fund small-scale, short-term activities that address needs in communities outside the United States. Ideally, the community where the project is to take place has identified the need and members of the community receiving the grant should be involved in the project as much as possible. **Your project must follow the mission of The Rotary Foundation which is to improve health, support education and alleviate poverty.** Grant funds cannot be used for the operating expenses of another organization.

Copy the application form to your computer and answer each question with enough detail so that the Committee fully understands what you plan to accomplish. This is a Microsoft Word document so you can enter your information below each question and take as much space as necessary. **Please keep your application as a Word document** so that minor corrections (such as typos) can easily be fixed by the Committee Chair.

The Club President for 2022-2023 and the Club President for 2023-2024 must sign and date the application and the Memorandum of Understanding which follows the application.

DO NOT BEGIN YOUR PROJECT UNTIL YOU HAVE RECEIVED OFFICIAL NOTICE FROM THE DISTRICT THAT THE ROTARY FOUNDATION APPROVED THE DISTRICT'S ENTIRE GRANT APPLICATION. The Committee Chair will contact you by email or phone as soon as possible once The Rotary Foundation sends their approval.

Once you have received approval to begin, keep receipts of all expenses and take pictures of the project in progress. (Take a "before" picture if applicable.)

District grant funds will be paid to the club by the District Treasurer after submission of the Final Report and its acceptance by the Grants Committee Chair. An exception may only be made upon approval of the Grants Management Chair in consultation with the Grants Committee.

Clubs are encouraged to consider collaborating with other Rotary clubs and other organizations to make a bigger impact. If two Rotary clubs are involved, each must submit an application.

Important Dates:

- Monday May 1, 2023 – INITIAL deadline – this will give the Committee Chair time to review the application and let you know if anything is missing
- Monday May 15, 2023 – ABSOLUTE APPLICATION DEADLINE – **applications or related documents received after this date will not be reviewed**
- Late May 2023 – The District Grants Committee reviews the applications, recommends funding and sends one entire application to The Rotary Foundation for approval.
- June or July 2023 – The Committee receives approval from The Rotary Foundation. The Committee Chair will contact you to begin your project.
- Wednesday January 31, 2024 – Progress Report due.
- Sunday June 30, 2024 – Final Report due on the District form to describe the project with pictures and copies of expense receipts.

Rotary District 7170 2023-2024 District INTERNATIONAL Grant Application

1. Tell us about your club:
 - Name and club number, number of members, where do you meet?
 - What has been your club’s previous involvement in District grant projects?
 - Has your club contributed to The Rotary Foundation in the current Rotary year?
 - Are your club’s dues to Rotary International paid currently?
 - If you have received a previous grant, are your reports up to date?

2. Describe the project:
 - Brief Name
 - What is the need for such a project?
 - How will this need be met?
 - How was it chosen?

3. Who will benefit from the project? How will they benefit?

4. Where will the project take place?

5. When will the project be started and finished? (It should be finished no later than June 30, 2024).

6. Who will own the project when it is finished? (This cannot be the club or a Rotarian.)

7. What will the Rotarians do? Are there others involved? What will they do?

8. Is another organization involved in addition to the Host club (the club receiving the project)? If so, please attach a letter from them confirming the need and their support of the project.

9. How much will the project cost and where will the money come from? (Minimum \$1,000 – maximum \$5,000) **Attach or include quotes or catalog/website pages from suppliers to document the estimated expenses.**

INCOME	
District Grant	
Club Contribution	
Other source-define	
Other source-define	
Total Income	
EXPENSES	
Sales Tax (if applicable)	
Total Cost	

10. The Club covers the project expenses and is reimbursed by the District once the final report is submitted and approved. Is the Club able to cover the cost of the project in advance?

11. How will this project be maintained and sustained beyond June 30, 2024?

12. If the grant application is approved and the final report accepted, the reimbursement check will be made payable to the club. Where should the check be sent?
13. How will you inform and promote the project to the community?
14. At least one club member must attend the District Grants seminar. This was a webinar on February 4, 2023. A minimum of two persons is preferred, namely the club president, president-elect, the club's Foundation or grant chair. **Who attended?**
15. Sponsoring Club (your club) Oversight Committee: list the names and **contact information** (address, phone number, email address) of at least three club members to oversee the project and be responsible for the expenditure of funds.
16. Host Club Oversight Committee: list the names and **contact information** (address, phone number, email address) of at least three club members in the Rotary club that is receiving and implementing the project to oversee the project and be responsible for the expenditure of funds. Attach a letter from the host club confirming their need and support for this project.

Rotary Club Commitment

The following signatures of the sponsoring Rotary Club Presidents for 2022-2023 and 2023-2024 confirm that:

- a. All information contained in this application is true, accurate and complete, to the best of our knowledge.
- b. The Club has agreed to undertake this project as an activity of the Club and other organization (if any) involved;
- c. The Club understands and will comply with the required Rotarian activities and reporting requirements as stated;
- d. The Club agrees that a Progress Report will be provided by January 31, 2024 and a Final Report no later than June 30, 2024.

Sponsoring Rotary Club of _____

Date: _____

Club President 2022-2023 (please print) _____

Signature _____

Contact information (mailing address, phone number, email address) _____

Club President 2023-2024 (please print) _____

Signature _____

Contact information (mailing address, phone number, email address) _____

District Grant Number (to be entered by the Grants Committee Chair) _____

Club Qualification Memorandum of Understanding (MOU)
The Rotary Foundation – 2023-2024

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds

1. Club Qualification

To participate in Rotary Foundation district and global grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF) and to send at least one club member to the district's grant management seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in Rotary Foundation district grants. By completing these requirements, the club becomes qualified and eligible to participate in the TRF grant program.

- A. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.
- B. To maintain qualified status, the club must comply with this MOU, and 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.

2. Club Officer Responsibilities

The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants.

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 Plan

The club must have a written financial management plan to provide consistent administration of grant funds.

The financial management plan must include procedures to:

- A. Maintain a standard set of accounts, which includes a complete record of receipts and disbursements of grant funds.
- B. Disburse grant funds, as appropriate.
- C. Maintain segregation of duties for handling funds.
- D. Establish an inventory system for equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities.
- E. Ensure that all grant activities, including the conversion of funds, comply with local law.

4. Bank Account Requirements

In order to receive grant funds, the club should have a dedicated bank account that is used solely for receiving and disbursing TRF grant funds.

- A. The club bank account must:
 1. Have a minimum of two Rotarian signatories from the club for disbursements.
 2. Be a low or non-interest bearing account.
- B. Any interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.
- C. A separate account should be opened for each club-sponsored grant, and the name of the account should clearly identify its use for grant funds.
- D. Grant funds may not be deposited in investment accounts including, but not limited to: mutual funds, certificates of deposits, bonds, and stocks.
- E. Bank statements must be available to support receipt and use of TRF grant funds.
- F. The club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.

5. Report on Use of Grant Funds

The 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.

6. Document Retention

The club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification and TRF grants. Retaining these documents supports transparency in grant management and assists in the preparation for audits or financial assessments.

- A. Documents that must be maintained include, but are not limited to:
 1. Bank information, including copies of past statements.
 2. Club qualification documents including a copy of the signed MOU.
 3. Documented plans and procedures, including financial management plan, procedure for storing documents and archives, succession plan for bank account signatories and retention of information and documentation.
 4. Information related to grants, including receipts and invoices for all purchases.
- B. Club records must be accessible and available to Rotarians in the club and at the request of the district.
- C. Documents must be maintained for a minimum of five years, or longer, if required by local law.

7. Reporting Misuse of Grant Funds

The club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the club that does not tolerate the misuse of grant funds.

Authorization and Agreement

This Memorandum of Understanding (MOU) is an agreement between the Club and District 7170 and acknowledges that the Club will undertake measures to ensure the proper implementation of grant activities and proper management of Foundation grant funds. By authorizing this document, the club agrees to comply with all of the conditions and requirement of the MOU.

Club President

Term: 2022-2023

Name _____

Please print

Signature _____

Date _____

Club President

Term: 2023-2024

Name _____

Please print

Signature _____

Date _____

If the same person is serving as President both years, another officer of the Club should sign as well.

Please save a copy of this document for your records.