



Grant Application Process Procedures

There are a few changes this year with our application process. The Grant Committee asks you to follow this process to help us be more efficient for the clubs and the district.

- Completed grant applications must be emailed to the Rotary Foundation District Grants Sub-Committee Chair, Ryder Taff at rotary6820grants@newper.com
- Submit your grants as soon as possible.
- Grants must be submitted within one month **PRIOR TO** the beginning date of the project. Grants submitted after the project has begun will not be considered per RI grant rules.
- Once you submit the grant, if you have not heard from the grant committee chair Ryder Taff within two weeks, please contact him at rotary6820grants@newper.com or call him at 601-991-3158
- Final reports are due back within 30 days of the completion of the project. A final report template is attached.
- Publicity is required with each grant's Final Report to be submitted to the grant committee including press release or copy of social media post and pictures.
 - This publicity will be used by the District.
 - If you would like assistance with the publicity of the project, please contact the District PR Chair Regina Todd at rtodd@rankinfirst.com or 601-572-7319.
 - The district has a PR committee that has expertise in all areas of Public Image and they are available to help clubs.
- If you do not spend all that you budgeted, and the district grant was larger than 50% of the total spent, you must refund the district the difference between the requested and actual 50% match. Refunds are due within 30 days of the completion of the project. Mail refund checks to: District 6820 Treasurer David Clark, 1604 South Main Street, Greenville, MS 38701.
- The Club must have a Foundation Committee, had a member attend the Grants Management training and be certified each year to be eligible to receive a District Grant.
- The club must agree to implement the financial and stewardship requirements in the memorandum of understanding (MOU) which is attached. Please attach necessary documentation of training and copy of signed MOU.



Rotary District 6820 2024-25 DDF Grant Application

District Use Only Date Received: _____ Date Approved: _____

Club Name: _____

Project Name: _____

Please print or type your responses and use additional sheets of paper if necessary.

Rotary District 6820 reserves the right to request additional information, clarification, or explanation.

1. Describe the project, its location and objectives. Include how the project will benefit the community or other Rotary International areas of focus.

Estimated start date: _____ **Estimated completion date:** _____

2. Describe non-financial participation by Rotarians in the project (i.e. SPECIFIC Rotarian Activities).

3. Budget: Please include or attach a complete, detailed, and itemized budget for the entire project, listing item, vendor/contractor and amount. Include pro forma invoices of all items costing \$1,000 or more.

The District approves grants up to a 50% match based on available funds.

Total project cost: \$ _____

Club contribution: \$ _____

District funds requested: \$ _____

4. How will the general public know this is a Rotary-sponsored project? All district funded grants must publicize that the project was in conjunction with Rotary 6820 funds. Please provide details, e.g., publicity in a newspaper, radio, television, social media, display of Rotary logo, etc:



Rotary District 6820 2024-25 DDF Grant Application

5. Project Contacts: Two Rotarians must be listed who will provide oversight and management of the project funds.

Primary contact name: _____ Rotary position: _____

Phone number: _____ Email: _____

Secondary contact name: _____ Rotary position: _____

Phone number: _____ Email: _____

Rotary District 6820 Treasurer Please Mail Check To:

Name: _____ Rotary position: _____

Address: _____

6. Cooperating organizations: If the project involves a cooperating organization, please provide the name of the organization below. By signing this application, the Rotarian sponsors endorse the organization as reputable, responsible, registered with the project country, and acting within the project country.

Name(s) of cooperating organization(s): _____

Authorization: All Rotary clubs/districts involved in this project are responsible to The Rotary Foundation for the conduct of the project and for reporting of it. The signatures on the application confirm that the sponsors understand and accept the responsibility. The signature of the sponsors also affirm that all information in this application is true and accurate, to the best of their knowledge. The Club must have this committee, had a member attend the Grants Management training and be certified each year to be eligible to receive a District Grant. Additionally, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation.

CLUB PRESIDENT: As President of the Rotary Club of _____

I hereby affirm that the Club has voted to undertake this project as an activity of the club.

Printed Name _____

Signature _____ Date _____

CLUB PRESIDENT ELECT: As President-Elect of the Rotary Club of _____

I hereby affirm that the Club has voted to undertake this project as an activity of the club.

Printed Name _____

Signature _____ Date _____



Rotary District 6820 2024-25 DDF Grant Application

GRANT APPLICATION RECEIVED BY TRF DISTRICT 6820 FOUNDATION COMMITTEE CHAIR

Name _____, TRF District 6820 Foundation Committee Chair

Signature _____ Date _____

THE ROTARY FOUNDATION DISTRICT 6820 COMMITTEE RESULTS:

GRANT APPROVED _____

GRANT DENIED _____

Name _____, District 6820 Grants Sub-Committee Chair

Signature _____ Date _____

DISTRICT GOVERNOR: As Governor of District 6820, I hereby affirm the use of US\$_____ from my District's Grant Funds for this project.

Name _____, District 6820 Governor

Signature _____ Date _____

Individual Project Summary. District Grant # _____

If you have questions about District Grants, please feel free to contact the District Rotary Foundation Committee Chair or District Grants Sub-Committee Chair at:

The Rotary Foundation District Committee Chair Ed Thurmond
601-946-8065
edthurmond42@gmail.com
Club: Lexington

The Rotary Foundation District Grants Sub-Committee Chair Ryder Taff
601-991-3158
rotary6820grants@newper.com
Club: Madison-Ridgeland

Completed applications must be e-mailed to: Ryder Taff, The Rotary Foundation District Grants Sub-Committee Chair

CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING

THE ROTARY FOUNDATION

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 global and packaged 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, 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.

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.

Club Memorandum of Understanding (June 2012) 2

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 all 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

A. The club bank account must:

1. Have a minimum of two Rotarian signatories from the club for disbursements.

2. Be a low- or noninterest-bearing account.

B. Any interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.

C. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.

D. Bank statements must be available to support receipt and use of TRF grant funds.

E. 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 club MOU.
- 3. Documented plans and procedures, including:
 - a. Financial management plan
 - b. Procedure for storing documents and archives
 - c. 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 is an agreement between the club and the district 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 the conditions and requirements of the MOU.

On behalf of the Rotary Club of _____, the undersigned agree to comply with all the conditions and requirements of the MOU for Rotary year 2023-2024 and will notify Rotary International District 6820 of any changes or revisions to club policies and procedures related to these requirements.

Club President

Club President-elect

Term _____

Term _____

Name _____

Name _____

Signature _____

Signature _____

Date _____

Date _____

FINAL REPORT - Due within 30 days of completion of project
ROTARY DISTRICT 6820 GRANT FINAL REPORT

ROTARY YEAR 2024-25

Rotary Club: _____

Project Title: _____

Beneficiaries

How many non-Rotarians benefited from this project? _____

Financial Report

Club funds _____

District Grant funds _____

Other source of funds (itemize) _____

Unused Funds: _____ return to District 6820 Grant Fund Account **within 30 days of completion of project to:**

Rhonda DiBiase, District 6820 Exec. Secretary, 3316 Old Hwy 61 S, Leland, MS 38756

1. Expenditures Copy of invoice(s) please (Original Invoices must be saved by club for 3 years)

Total Project Expenditures _____

2. By signing this report, I confirm that to the best of my knowledge these District Grant funds were spent only for eligible items in accordance with Trustee-approved guidelines, and that all the information contained herein is true and accurate. Receipts for all grant-funded expenditures have been provided to the district. I also understand that all photographs submitted in connection with this report will be the property of RI and TRF's royalty free irrevocable license to use the photographs now or at any time in the future, throughout the world in any manner it so chooses and in any medium now known or later developed. This includes the right to modify the photograph(s) as necessary at RI's sole discretion. This also includes, without limitation, use on or in the web sites, magazines, brochures, pamphlets, exhibitions and any other promotional materials of RI or TRF.

Signature of Project Contact: _____ Date: _____

Print name, Rotary title, and club: _____

3. Submit a public image piece to the grant committee with this report. Please contact the District Public Image team for assistance. Regina Todd, rtodd@rankinfirst.com or 601-572-7319