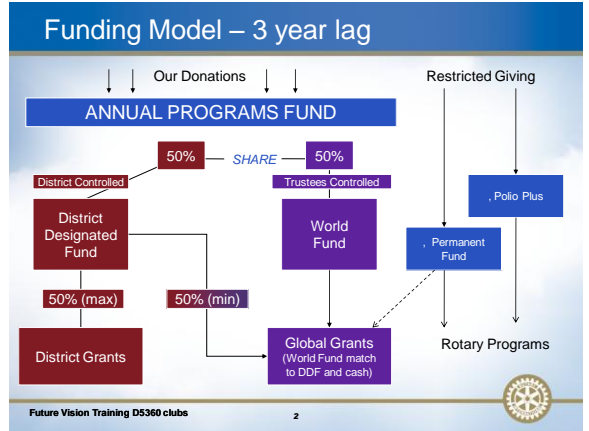



Club Qualification





Qualification

- Clubs and districts must be qualified to receive TRF funds (DDF-District Designated Funds)
- MOU ensures proper governance for grants
 - Covers District & Global Grants
 - Districts with TRF
 - Clubs with Districts & TRF
- Qualification process is simple



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Club Qualification Requirements


- Attend Club Qualification seminar
 - Minimum 1 person per year
- Club Board agrees to MOU requirements
- Club President & PE sign MOU
- Club sends to District.



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WHY a Club MOU


- Legal Agreement - club with District
- D5360 Club responsibilities
 - Implementing Global Grants (infrequent)
 - Bank accounts for each project
 - Implementing District Grants
 - Without project bank account.



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1- Terms of Qualification

- Must be done annually
- Club responsible for grant funds
- Club responsible for conflicts of interest
- Club cooperates with all audits



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2 - Club Leadership Responsibilities for Qualification

- Club member appointed to:
 - Manage club qualification
 - Ensure grant management practices implemented
- Document retention plan established
 - Ongoing system
- Club appointee attends Qualification training

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3 A– Financial Management

- Implementing Global Grants
 - Usually in developing country
 - Separate bank account
 - Low interest only – to project
 - No investment accounts
 - Two signatures

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3B – Financial Management Plan

- Separate account for each project
- Use recognized accounting & funds management systems
- Inventory system if required
- Monthly bank reconciliation
- Obey all laws

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4 - Document Retention

- Store originals min 5 years
- Documents stored
 - Applications, proposals, agreements
 - Reports
 - Receipts, invoices, purchase orders
 - bank documents
- Storage site accessible to club, District & TRF

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5 – Report on Use of Grant Funds

- As per Terms & Conditions for District & Global Grants
- Global Grants –on-line via RI webpage
- District Grants- DGC webpage

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6 – Method for Reporting & Resolving Misuse

- Club obligated to report misuse to District
- District Grants Committee works at resolution

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7 - Authorization & Agreement

- Signed on behalf of club Directors
 - President
 - President Elect

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When & Where do we get the Form

- www.rotary5360.org
 - DOCUMENTATION
 - Grants Documentation
 - Club Memorandum of Understanding
- All Presidents Elects will get a copy at PETS

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What do we do with it?

- Discuss at Board Mtg
- Get 2 signatures
- FAX to District Administrator

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Key dates – District Grants

- MAR. 18/19 - PETS training
- May 7th – deadline for Club Qualification
- May 16th – deadline for club applications
- May 30th – District applies to TRF
- July – TRF sends funds to District

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DOING GOOD IN THE WORLD







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