

ENGLISH (EN)

# Cooperating organization

# MEMORANDUM OF UNDERSTANDING

## An agreement between

## [Name of host Rotary club and/or district, country], “Host Sponsor,”

## [Name of international Rotary club and/or district, country], “International Sponsor,”

## [Name of cooperating organization, country], “Organization 1,”

## and [Name of cooperating organization, country], “Organization 2”

### SUBJECT

Global Grant #[Grant number], [Title], in [Community], [Country], the “Rotary Grant.”

### DEFINITION

A cooperating organization is any reputable non-Rotary organization that provides expertise, infrastructure, advocacy, training, education, or other support for the grant project. Cooperating organizations must comply with all reporting and auditing activities required by The Rotary Foundation and provide receipts as requested.

### PURPOSE

This document establishes an agreement between the parties listed above to implement a project funded by a Grant from The Rotary Foundation. This document may also be used with other groups that are participating in the project, such as beneficiary organizations, non-profit contractors, or government agencies.

### SHARED GOALS

All parties listed in this agreement will collaborate to achieve the following shared goals:

1. [add goal]
2. [add goal]

### HOST SPONSOR RESPONSIBILITIES

The following are suggested Host Sponsor responsibilities:

* Provide technical and professional services in support of the Rotary Grant project
* Provide volunteer training, mentoring, and financial review
* Direct and coordinate local community education and public relations
* Seek community support and resources for the project
* Host visiting Rotarians who come to support or learn about the Rotary Grant project
* Manage the grant funds and pay suppliers, vendors, or contractors
* Prepare Rotary Grant project reports, in cooperation with the International Sponsor
* Measure and evaluate project activities

The Host Sponsor will:

1. [add responsibilities]
2. [add responsibilities]

### INTERNATIONAL SPONSOR RESPONSIBILITIES

The following are suggested International Sponsor responsibilities:

* Direct and coordinate community education and public relations
* Direct and coordinate international fundraising efforts
* Travel to the project location to provide technical or professional service
* Assist the Host Sponsor in implementing and reporting on the Rotary Grant project

The International Sponsor will:

1. [add responsibilities]
2. [add responsibilities]

### ORGANIZATION 1 RESPONSIBILITIES

The following are suggested Organization responsibilities:

* Provide expertise, infrastructure, advocacy, training, education, or other support for the Rotary Grant project
* Submit itemized expense statements and receipts to the Host Sponsor or International Sponsor for reimbursement
* Maintain sufficient records and data to complete reports to The Rotary Foundation
* Report activities and results to the Host Sponsor and International Sponsor accurately and in a timely way
* Measure and evaluate project activities
* Continue to support the project financially or programmatically after Rotary Grant funding ends

Organization 1 will:

1. [add responsibilities]
2. [add responsibilities]

### ORGANIZATION 2 RESPONSIBILITIES

The following are suggested Organization responsibilities:

* Provide expertise, infrastructure, advocacy, training, education, or other support for the Rotary Grant project
* Submit itemized expense statements and receipts to the Host Sponsor or International Sponsor for reimbursement
* Maintain sufficient records and data to complete reports to The Rotary Foundation
* Report activities and results to the Host Sponsor and International Sponsor accurately and in a timely way
* Measure and evaluate project activities
* Continue to support the project financially or programmatically after Rotary Grant funding ends

Organization 2 will:

1. [add responsibilities]
2. [add responsibilities]

### MUTUAL UNDERSTANDINGS

All parties agree that:

1. The Rotary Grant, if approved, will be awarded to the Host Sponsor and International Sponsor.
2. The Host Sponsor and International Sponsor will control and manage the Rotary Grant.
3. The Host Sponsor and International Sponsor will be involved in all stages of the project.
4. The Host Sponsor and International Sponsor will each have a grant project management committee with at least three members, responsible for managing the project on their behalf.
5. The Host Sponsor and International Sponsor and the Organizations will abide by the [Terms and Conditions for Rotary Foundation District Grants and Global Grants](https://my.rotary.org/en/document/terms-and-conditions-rotary-foundation-district-grants-and-global-grants).
6. The Host Sponsor and International Sponsor affirm that the Organizations are reputable and responsible and act within all laws of the project country.
7. All grant funds will be received and managed by the Host Sponsor or the International Sponsor and will not be managed by the Organizations.
8. Grant funds will remain in the designated Rotary Grant bank account until they are needed to pay a vendor or reimburse a purchase.
9. All payments to vendors and reimbursements to Organizations will be supported by receipts, paid invoices, vouchers or written agreements.
10. The Organizations may contribute funds toward the project, but The Rotary Foundation does not match these funds.
11. The Organizations’ project-related documentation may be subject to independent financial and operational review by The Rotary Foundation.
12. In their separate club or district qualification memorandum of understanding, the Host Sponsor and International Sponsor have agreed to:

Ensure that all grant activities, including the conversion of funds from one currency to another, comply with local law

Ensure that the project adheres to The Rotary Foundation’s stewardship measures and grant management practices

Ensure that all people involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest

Report to the district any potential or real misuse or mismanagement of grant funds

Cooperate with any financial, grant, or operational audits

Maintain a standard set of accounts, which includes a general ledger and a complete record of all receipts and all disbursements of grant funds

Disburse grant funds in accordance with the Terms and Conditions for Rotary Foundation District Grants and Global Grants

Maintain records for items that are purchased, produced, or distributed through grant activities

Maintain a dedicated bank account to be used only for receiving and disbursing grant funds

Have a minimum of two Rotarian bank account signatories from the sponsoring clubs or districts for disbursements

Maintain a separation of duties for handling funds so no one person is solely in control of them

Maintain a written plan for transferring custody of bank accounts in the event of a change in signatories

Retain bank statements to substantiate the receipt and use of grant funds

Retain grant documents in a location known by and accessible to club and district officers

Retain grant documents for a minimum of five years, or longer if required by local law

### CONFLICTS OF INTEREST

Any real or perceived conflicts of interest must be disclosed to The Rotary Foundation, in compliance with The Rotary Foundation’s Conflict of Interest Policy for Program Participants in the Terms and Conditions for Rotary Foundation District Grants and Global Grants. This includes any instances of Rotarians acting as vendors or serving as trustees, directors, officers, or staff of one of the Organizations. If in doubt, any potential conflict should be disclosed.

Identify any real or perceived conflicts here:

1. [add conflicts]

### MODIFICATION

Modifications to this document will be made by mutual consent of the parties. A written modification, signed and dated by all parties and approved by The Rotary Foundation, must be issued before acting on any changes.

### CONTACT INFORMATION

Your privacy is important to Rotary International and The Rotary Foundation (collectively, “Rotary”) and the personal data you share with Rotary will only be used for official Rotary business, such as in relation to the Rotary Grant. Personal data collected on this form is subject to [Rotary’s Privacy Policy](https://my.rotary.org/en/privacy-policy).

### AUTHORIZATIONS

By signing below, the parties agree to the terms of this memorandum of understanding.

Host Sponsor authorization:

|  |  |  |  |
| --- | --- | --- | --- |
| Signature and Date: |  |  | Date |
| Printed Name and Title: | Printed Name |  | Title |
| Postal Address: | Postal Address |
| Phone and Email: | Phone |  | Email |

International Sponsor authorization:

|  |  |  |  |
| --- | --- | --- | --- |
| Signature and Date: |  |  | Date |
| Printed Name and Title: | Printed Name |  | Title |
| Postal Address: | Postal Address |
| Phone and Email: | Phone |  | Email |

Organization 1 authorization:

|  |  |  |  |
| --- | --- | --- | --- |
| Signature and Date: |  |  | Date |
| Printed Name and Title: | Printed Name |  | Title |
| Postal Address: | Postal Address |
| Phone and Email: | Phone |  | Email |

Organization 2 authorization:

|  |  |  |  |
| --- | --- | --- | --- |
| Signature and Date: |  |  | Date |
| Printed Name and Title: | Printed Name |  | Title |
| Postal Address: | Postal Address |
| Phone and Email: | Phone |  | Email |