

# DISTRICT 5830 ROTARY FOUNDATION COMMITTEE MANUAL

## CLUB QUALIFICATION CHECKLIST



Rotary International District 5830 requires that any club in the district that wishes to participate in Rotary Foundation grant activities of District 5830 or the Rotary Foundation be qualified. This checklist of the steps necessary to complete the qualification process can be used to ensure timely completion of the process.

<u>Step</u>	<u>Explanation</u>
<input type="checkbox"/> <b>1.</b> Your Rotary club must have made contributions to the Annual Fund three years prior to the incoming Rotary year.	<p>If your club did not make Annual Fund contributions three years ago your club cannot qualify. You may proceed with the qualification process to gain a deeper understanding of the process but you will not be qualified this Rotary year.</p>
<input type="checkbox"/> <b>2.</b> Your incoming Club President and Foundation Chair must attend a District 5830 presented “Club Qualification Training” seminar.	<p>Each will be required to sign a record of attendance including time in and out. To get credit the participant must be in attendance for the entire session. After both officers have completed training a Club Qualification Training Certificate of Attendance will be sent to the club.</p>
<input type="checkbox"/> <b>3.</b> Your current Club President and your incoming Club President and Foundation Chair must sign the Club Memorandum of Understanding (MOU). <i>See related deadlines below!</i>	<p>The signed club MOU <b>including the documentation required in the next step</b> must be mailed or emailed to the District 5830 Rotary Foundation Committee at</p> <p style="text-align: center;">Carroll Greenwaldt            Chair, District 5830 Rotary Foundation Committee            345 Betty Jo Drive            Longview, TX 75605</p> <p style="text-align: center;">wgrnwldt@eastman.com</p> <p style="text-align: center;">903-235-6448</p>
<input type="checkbox"/> <b>4.</b> The signed MOU must be accompanied by documentation supporting the assertions in the MOU.	<p><b>The documentation must include:</b></p> <ul style="list-style-type: none"> <li>• Amended club bylaws or a policies and procedures manual addressing the various additional duties of club officers in respect to the Rotary Foundations new grant system.</li> <li>• Copy of the club’s document retention plan.</li> <li>• Copy of IRS Form 990, 990EZ or 990-N for tax year ending June 30, of the prior year.</li> </ul>

- 5. Applications for Global Scholarship Grants

**The deadline for presentation of a Global Scholar Grant application to the Global Scholarship Grants**

**Subcommittee (GSGS) is April 1.** The scholar applicant and the sponsoring club can begin preparation of the application at any time. *However, it may not be sent to the GSGS until the club’s MOU and documentation have been received by the DRFC.*

- 6. Applications for Club Project Grants

**The deadline for presentation of Club Project Grant (CPG) applications to the District Grants Subcommittee**

**(DGS) is May 1.** The club can begin preparation of the application at any time. *However, it may not be sent to the DGS until the club’s MOU and documentation have been received by the DRFC.*

**Other Information**

The documents to the right will be useful in completing these steps. They are downloadable from the district web site.

[www.rotary5830.org](http://www.rotary5830.org)

Select the “Forms and Information” tab just under the home page banner. Then select “For Future Vision Preparation”.

If you have questions contact:

Carroll Greenwaldt

James Roberts

Club Memorandum of Understanding

Club MOU - Documentation Guide

Club MOU - Suggested Bylaws Amendments

Suggested RI Club Bylaws

903-235-6448 [wgrnwldt@eastman.com](mailto:wgrnwldt@eastman.com)

903-295-5999 [rts@jmrobertscpa.com](mailto:rts@jmrobertscpa.com)