



COOPERATING ORGANIZATION MEMORANDUM OF UNDERSTANDING

An agreement between

Rotary Club of Durban Umhlatuzana, Durban, South Africa, “Host Sponsor,”
Rotary Club of Los Alamos, New Mexico, United States, “International Sponsor,”
Umhlatuzana Education Fund, NPC, Durban, South Africa, “Organization 1,”
and Rotary Club of Pinetown, Pinetown, Durban South Africa, “Organization 2”

Note: The Foundation needs to receive this memorandum of understanding (MOU) in this exact form. Complete the form fields but do not edit any other text. If you aren’t sure how to complete the fields, refer to the tips at the end.

1. SUBJECT

Global Grant #224030 , Mariannridge High School Mathematics Tutoring and Enrichment Project , in Mariannridge, Durban, South Africa, the “Rotary Grant.”

2. DEFINITION

A cooperating organization is any reputable 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.

3. 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, nonprofit contractors, or government agencies.

4. PROJECT OBJECTIVES

All parties listed in this agreement will collaborate to achieve the following project objectives:

- a. Improve the quality of education by delivering mathematics tutoring and enrichment to high school learners in Mariannridge and neighboring communities on Saturdays (with grade 8 and 9 served during 2022 and one new grade per year added, so that in 2025 all grades from 8 through 12 are being served).
- b. Develop with the Mariannridge School staff appropriate classroom instruction combining the South African national mathematics curriculum with an enrichment aspect.
- c. Assist with basic computing skills instruction emphasizing a hand-on approach and practical applications.
- d. Secure funding from South African companies and foundations, as well as funders abroad, so that this project becomes sustainable beyond 2025 when it will have been expanded to its full scale thanks to support from Rotary.
- e. Devolve large parts of the management and running of this project to the UKZN student tutors organized as a student group, possibly in the form of a Rotaract Club.
- f. Devolve future fundraising beyond 2025 to the Umhlatuzana Education Fund, NPC, so that this project becomes self-sustaining.
- g. Assist student tutors finance their university studies through the payment of stipends.
- h. Develop ties with community and corporate leaders to ensure the longevity of the project.

5. HOST SPONSOR RESPONSIBILITIES

Describe the specific responsibilities of the Host Sponsor. The Host Sponsor will:

- a. Provide day-to-day management of the project, including recruiting tutors, arranging transportation of the tutors, liason with school management, procurement of pedagogical materials, and determination of the curriculum.
- b. Encourage tutors to organize themselves into a UKZN (University of KwaZulu-Natal) student group, which may evolve into a Rotaract club. This group would eventually take on many of the responsibilities now carried out by the RCDU. However most fundraising and the financial management would remain as a responsibility of the Umhlatuzana Education Fund and its directors, and the RCDU.
- c. Set up the computer lab at Mariannridge Senior Secondary School, develop together with the Mariannridge School staff a computing curriculum as part of the Saturday school, recruit volunteers (IT technicians) to help with the maintenance, and train a subset of the tutors to deliver the computing instruction.
- d. Present requests for payment of expenses from this grant to the Umhlatuzana Education Fund, NPC accompanied by adequate documentation to satisfy auditing requirements.
- e. Put together all reports for this project for the Rotary Foundation Global Grants sharing these reports with the International Sponsor and the Pinetown Club (aka Organization 2) prior to finalization and submission, and maintain all financial records for a period of at least 5 years.

6. INTERNATIONAL SPONSOR RESPONSIBILITIES

Describe the specific responsibilities of the International Sponsor. The International Sponsor will:

- a. Provide advice, expertise, and fiscal oversight.
- b. Provide assistance with fundraising in the United States and facilitate US donations collection through the Los Alamos Rotary 1312, Inc (the 501(c)(3) Foundation of the Los Alamos Club).
- c. Assist with report editing and review as required by The Rotary Foundation Global Grants.
- d. Explore possible exchanges so that young people from New Mexico and other supporting organizations may come to Durban to teach for a short period.

7. ORGANIZATION 1 RESPONSIBILITIES

Describe the specific responsibilities of Organization 1. Organization 1 will:

- a. Carry out the financial management of the project consistent with the budget of this proposal and the rules of Rotary International.
- b. Provide section 18a certificates to South African donors (for tax exemption) and liaise with these donors to make sure that the requirements are met so that these donors can receive credit and meet auditing requirements for Broad-Based Black Economic Empowerment credits for their scorecard where needed.
- c. Actively seek out new donors to render the project sustainable beyond 2025, emphasizing South African corporate donors likely to make recurrent contributions, motivated in part by B-BBEE credits, as well as US donors, and South African charitable foundations.
- d. Create new and deepen existing links with members of the Mariannridge and surrounding community, including educators, community organizers, and religious leaders.
- e. File yearly reports and returns to the South African Revenue Service and to the Companies and Intellectual Property Commission as required by law, and provide an annual report to all donors.
- f. Undertake that for the duration of the global grant, a majority of voting Directors of the Umhlatuzana Educational Fund will be members of the RCDU. Moreover, all expenditures will require the authorization of two people, both of whom must be RCDU members.

8. ORGANIZATION 2 RESPONSIBILITIES

Describe the specific responsibilities of Organization 2. Organization 2 will:

- a. Assist the RCDU with delivering this project.
- b. Use its ties with schools and learners in the neighboring community of KwaNdengezi to integrate new learners into this programme as described in this proposal and beyond.

9. MUTUAL UNDERSTANDINGS

All parties agree that:

- a. The Rotary Grant, if approved, will be awarded to the Host Sponsor and International Sponsor.
- b. The Host Sponsor and International Sponsor will control and manage the Rotary Grant.
- c. The Host Sponsor and International Sponsor will be involved in all stages of the project.
- d. 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.
- e. The Host Sponsor and International Sponsor and the Organizations will abide by the [Terms and Conditions for Rotary Foundation Global Grants](#).
- f. The Host Sponsor and International Sponsor affirm that the Organizations are reputable and responsible and act within all laws of the project country.
- g. All grant funds will be received and managed by the Host Sponsor or the International Sponsor and will not be managed by the Organizations.
- h. Grant funds will remain in the designated Rotary Grant bank account until they are needed to pay a vendor or reimburse a purchase.
- i. All payments to vendors and reimbursements to Organizations will be supported by receipts, paid invoices, vouchers or written agreements.
- j. The Organizations may contribute funds toward the project, but The Rotary Foundation does not match these funds.
- k. The Organizations' project-related documentation may be subject to independent financial and operational review by The Rotary Foundation.
- l. 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 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 Rotary member 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

10. CONFLICTS OF INTEREST

Any real or perceived conflicts of interest must be disclosed to Rotary grants staff during the grant application process, in compliance with The Rotary Foundation’s Conflict of Interest Policy for Grants in the Terms and Conditions for Rotary Foundation Global Grants. A conflict of interest occurs when someone is in a position to make or influence a decision about a grant that could benefit them, their family, their business, or an entity in which they serve in a paid or voluntary leadership or advisory position. This includes any instances of Rotary members 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:

None

11. 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.

12. 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](#).

13. AUTHORIZATIONS

TIPS FOR COMPLETING THIS FORM

GENERAL

If you're working with just one organization, provide information for Organization 1 only. Always include the Rotary Host Sponsor and International Sponsor.

PROJECT OBJECTIVES

In this section, project partners outline the overall goals of the project that all partners hope to achieve together.

For example:

- Improve the quality of education students receive at Community Primary School
- Improve the quality of care for cancer patients at Community Hospital
- Increase farmers' yields by 10% through drip irrigation

RESPONSIBILITIES SECTIONS

Meeting with all project partners to assign responsibilities and record them in writing can prevent conflicts and increase your project's chances of success. It helps ensure that everyone agrees on the basics of the project plan and prevents confusion during implementation. When you define the responsibilities of each partner, carefully consider their resources and skills. Remember that each project has its own unique roles and responsibilities that are essential for effective implementation. List detailed and specific responsibilities for your project.

Questions to consider when determining responsibilities:

- Who will provide technical and professional services? What specific services will be provided, or what specific skills are needed?
- What types of staffing, infrastructure, or equipment is required, and who will provide those?
- Who will provide training, mentoring, education, advocacy, and financial review?
- Who will direct and coordinate local community education and public relations?
- Who will seek community support and resources for the project?
- Who will manage the grant funds and pay suppliers, vendors, and contractors?
- Will cooperating organizations submit itemized expense statements and receipts before they receive grant funds?
- Who will direct and coordinate fundraising efforts?
- Who will pay for long-term equipment maintenance, operations, programming, and staffing

after Rotary Grant funding ends? (Note that Rotary members may continue to support the project, but the project should not depend solely on that support.)

- Who will prepare Rotary Grant reports? Who will collaborate on reporting?
- How will financial records be stored? Who will maintain these records? What is the document retention plan?
- Who will measure and evaluate the project's outcomes? How will they do this? Who will collect results? How will the outcomes be shared?

MUTUAL UNDERSTANDINGS

For legal reasons, the Foundation needs this section to remain as it is. It must not be added to or edited. We understand that, for certain relationships, Rotary members may need to sign a second MOU or contract to comply with local laws. Even in such cases, however, the Foundation needs this MOU to be submitted with your grant application.

AUTHORIZATIONS

Make sure that all parties have signed the MOU. If any signature is missing, it will be considered incomplete. Each sponsor and organization should decide who will represent it as a signatory.

If you have any concerns or questions, your regional grants officer can review your MOU before it is signed to make sure it's complete.