

Transition to Future Vision

Preparing Your District for Rotary Foundation Grants in 2013



The global launch of The Rotary Foundation's new grant model, outlined in the Future Vision Plan, is approaching. To prepare your district to begin participating on 1 July 2013, review the following timeline of major events and tasks.

2011-12		Learn
February-June		Begin planning for 2012-13
May		RI Convention workshops
2012-13		Train, Qualify & Prepare
1 July 2012		Appoint a district Rotary Foundation committee chair for 2013-16
July-December		Identify and appoint chairs for district Rotary Foundation subcommittees
August-December		GETS and Rotary institutes Train clubs at district Rotary Foundation seminars
October *NEW*		Initiate district qualification process for 2013-14 District grant application available for 2013-14
January 2013		International Assembly *NEW* Global grant application available for 2013-14
February-June		Continue training and qualifying clubs *NEW* Submit applications for Matching Grants and District Simplified Grants by 31 March Apply for 2013-14 Rotary Foundation grants online Submit reports for all Rotary Foundation grants and programs
June		RI Convention workshops
2013-14		Participate
1 July 2013		Global launch of new Rotary Foundation grant making model

Learn in 2011-12

February-June 2012

Begin planning for 2012-13

Learn about the new grants and begin planning for 2012-13 by completing the following tasks:

- Think about who your district will appoint as the district Rotary Foundation committee chair for July 2013 onward. Include the current governor, governor-elect, governor-nominee (if selected), and district Rotary Foundation committee chair in these discussions. The incoming DRFC chair, if not already in the position, should be a part of the district Rotary Foundation committee for 2012-13, understudying the current DRFC chair. He or she should lead the training and changeover to the new grant model.
- Consider developing a relationship with a [pilot district](#) to share experiences. Ask your regional Rotary Foundation coordinator to connect you with pilot districts and answer any questions you have regarding the new grant structure.
- Consider how your district will implement its district grant, including collecting project proposals and ideas from clubs, and how you will communicate with your member clubs.
- Note that timelines for district and global grants are different from the previous Foundation programs, so be sure to plan accordingly. For example, districts don't need to select a [scholar](#) in 2012 for study in 2013-14. Global grant scholarship proposals and applications are accepted on a rolling basis throughout the year, although applications should be submitted at least three months before studies begin in order to allow adequate time for Foundation review and processing.
- Train club leaders at club and district events, including PETS and the district assembly, on the current programs that will be running in their year and on the process of transitioning to the new grants in the second half of their year. Assist clubs with the transition by asking clubs to:
 - Begin thinking about larger, more sustainable projects.
 - Read about Future Vision on the [RI website](#) and view [e-learning modules](#).
 - Read the [club memorandum of understanding](#) (MOU) and determine what the club is already doing and which processes they'll need to have in place to implement it.
 - Plan the grant management seminar. Updated training materials will be ready by July 2012, and seminars should be offered after the district is qualified. For additional information, review the [Grant Management Manual](#) and [Leaders' Guide](#).

May 2012

RI Convention workshops

Train, Qualify & Prepare in 2012-13

1 July 2012

Appoint a district Rotary Foundation committee chair for 2013-16

If your district isn't appointing a new district Rotary Foundation committee (DRFC) chair for 1 July 2013, you have the option to appoint a new DRFC chair whose term will start 1 July 2013 and end 30 June 2016, even if the current district Rotary Foundation committee chair's term would otherwise extend beyond 30 June 2013.

Appoint a DRFC chair who can attend training associated with the Rotary institutes, attend training at the 2013 International Assembly, and begin the district qualification process. Before selecting the district Rotary Foundation committee chair:

- Read the [District Rotary Foundation Committee Manual](#). Consider who else will serve on the committee starting in 2013-14.

July-December 2012

Identify and appoint chairs for district Rotary Foundation subcommittees

Identify and appoint chairs for subcommittees, including the stewardship subcommittee, within the district Rotary Foundation committee to serve from July 2013. Identify the members of the grants subcommittee to serve from July 2013 as well.

August-December 2012

GETS and Rotary institutes

Sessions on Rotary Foundation grants will be held at these two training meetings. District leaders should educate and inform Rotarians about the major aspects of the plan, including district qualification, district structure, District Designated Funds policy, and district grants. Before you attend the governors-elect training seminar (GETS) or Rotary institute:

- Learn as much as you can about the new Rotary Foundation grants. Find success stories and updates on the [RI website](#), and sign up for the [Future Vision newsletter](#).
- Complete the following [e-learning modules](#):
 - ***NEW*** [Future Vision Overview](#) (revised version available 1 May)
 - [Grant Management](#)
 - [Choosing a Grant](#)
 - [Foundation Funding](#)

New modules will be available on the new online system in July.

- Read the [district memorandum of understanding](#) (MOU). Create a plan to implement the MOU. (Note: Indian districts should refer to [this version](#).)
- Review the SHARE kit that was mailed to every district in June to be able to discuss your DDF policy based on the amount of DDF your district will have in 2013-14.
- Attend [webinars](#) on Rotary Foundation grants provided by The Rotary Foundation.
- ***NEW*** View the following recorded webinars:
 - [The Future of Grant Making](#)
 - [District Grant Best Practices](#)
- Prepare a list of questions for your district governor-elect to bring to GETS.

Train clubs at district Rotary Foundation seminars

To help clubs prepare for the transition include information on the new grants at the district Rotary Foundation seminar. See the [District Rotary Foundation Seminar Manual](#) for presentation materials. Revised materials will be available July 2012.

***NEW* October 2012**

Initiate district qualification process for 2013-14

District governors, district governors-elect, and district Rotary Foundation committee chairs will have access to the online system.

- Qualify your district in Member Access.
- Implement the district memorandum of understanding, which includes holding grant management seminars to qualify clubs.

District grant application available for 2013-14

District governors-elect, district Rotary Foundation committee chairs, and district grants subcommittee chairs will have access to the online application.

- Start your planning process with clubs for district grants; district grants application will be available in Member Access.

January 2013

International Assembly

District governors-elect, district Rotary Foundation committee chairs, and regional Rotary Foundation coordinators will attend a day of joint training in San Diego followed by a second day of training for district Rotary Foundation committee chairs. At this training, districts will have the opportunity to learn from each other. While districts may have made some important decisions before this meeting, be open to adjusting your

district's processes based on ideas you hear from other districts. Before attending the training:

- Read the [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#). Determine how your district will allocate the District Designated Fund and how it will approve club proposals for grant funds.
- Complete the following e-learning modules:
 - [Developing Global Grants](#)
 - [Project and Activity Sustainability](#)
 - [Areas of Focus: An Overview](#)
 - [Vocational Training Teams](#)
 - [Rotary Scholarships](#)
- Learn more about Rotary's [strategic partnerships](#) and the available [packaged grants](#).
- Prepare a list of questions for your district governor-elect to bring to International Assembly.

***NEW* 2013-14 global grant application open**

Clubs and districts will be able to log in to Member Access to see the new global grant application.

February-June 2013

Continue training and qualifying clubs

Include training for assistant governors and other district team members. Before districts train and qualify clubs, have the following information available to share with clubs at PETS, the district assembly, and grant management seminars:

- Promote Rotary Foundation grant webinars for clubs (provided by The Rotary Foundation) to club leaders.
- Ensure [grant management seminars](#) are scheduled and promoted to clubs.
- Consider what additional qualification requirements, if any, your district will implement.
- Assess how your district reports on the use of its [District Designated Fund](#) to clubs and how your district will report on DDF use with Rotary Foundation grants.
- Be prepared to share the processes for DDF allocation, district grant applications and guidelines, and club qualification requirements with clubs.
- Have a timeline for gathering club proposals for district grants. Ensure that clubs know they can now apply for district and global grants to sponsor vocational training teams and scholarships.
- Use Rotary materials in your club-level training.

***NEW* Submit applications for Matching Grants and District Simplified Grants by 31 March**

31 March 2013 is the deadline for Matching Grants and District Simplified Grant applications for nonpilot districts.

Apply for 2013-14 Rotary Foundation grants online

Before applying for grants:

- Ensure that clubs and district are qualified.
- Begin collecting club proposals for district grant funds, and submit the district grant spending plan online as early as possible (district grants must be approved and payment requirements complete by 15 May 2014).
- Ensure that the district is up-to-date on District Simplified Grant reporting to receive payment on 1 July 2013. Reporting rule/payment contingency: Districts may have one open DSG, but must have successfully reported on at least 50 percent of the grant.
- Complete the following e-learning modules:
 - [Member Access: District Grant Application](#)
 - [Member Access: Global Grant Proposal](#)
 - [Member Access: Global Grant Application](#)
- Note that applications that are processed in 2012-13 will receive funding starting 1 July 2013.
- Begin implementing processes to manage new grants.

If your district is having difficulties with the transition, contact your regional Rotary Foundation coordinator for assistance.

Submit reports for all Rotary Foundation grants and programs

Before a district grant or global grant can be approved, primary sponsors must be up-to-date on humanitarian grant reporting for previous grants that they sponsored. Each primary grant sponsor may have 10 open grants total; a club sponsoring grants may have 10 open, and a district serving as the primary sponsor may also have 10, including Matching Grants, 3-H grants, District Simplified Grants, global grants, and district grants. Grant reporting is critical for all activities that Rotarians want to sponsor, including scholarships, humanitarian service, and vocational training teams.

- Once a grant is finished, report on it promptly and close it.
- Your district may have one open District Simplified Grant. Make sure you've submitted complete and accurate reports for at least half of the open grant.
- Submit final reports and reimbursement for Ambassadorial Scholarships and Group Study Exchange teams.

June 2013

RI Convention workshops

Participate in 2013-14

1 July 2013

Global launch of new Rotary Foundation grant making model

Begin using new Rotary Foundation grants.