

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.

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
1 October	Initiate district qualification process for 2013-14
31 October	2013-14 district grant application available for qualified districts
January 2013	*NEW* International Assembly *NEW* 2013-14 global grant and packaged grant applications open
February-June	Continue training and qualifying clubs Submit applications for Matching Grants and District Simplified Grants by 31 March
April	*NEW* Qualified clubs and districts can begin applying 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

Train, Qualify & Prepare in 2012-13

1 July

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

July-December

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. If your district is active in scholarships, you may wish to appoint a scholarships subcommittee chair.

August-December

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](#):
 - [Future Vision Overview](#)
 - [Grant Management](#)
 - ***NEW*** [Choosing a Grant](#)
 - ***NEW*** [Foundation Funding](#) (revised version available 1 August)
- ***NEW*** E-learning modules can also be found at <http://learn.rotary.org> in the form of courses. The e-learning modules listed above can be found in the following courses:

- Future Vision: Introduction to Future Vision
- Future Vision: Managing Grants
- Read the ***NEW*** [district memorandum of understanding](#) (MOU). Create a plan to implement the MOU.
Review the SHARE kit that was mailed to every district in June, and be prepared 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.
- 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 ***NEW*** [District Rotary Foundation Seminar Manual](#) for revised presentation materials.

1 October

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.
- ***NEW*** Districts must be qualified before they qualify their clubs.
- ***NEW*** Go to learn.rotary.org and view the course titled New Foundation Grants: Member Access. The Member Access: District Qualification e-learning module will be available 1 September.

31 October

2013-14 district grant application available for qualified districts

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

- Start your district grant planning process with clubs.
- ***NEW*** Districts must be qualified in order to access the online district grant application.
- ***NEW*** TRF review of spending plans begins in April. While 2013-14 district grant spending plans

can be submitted now, districts are encouraged to allow clubs sufficient time to learn about district grants and submit proposals.

January 2013

***NEW* International Assembly**

District governors-elect, district Rotary Foundation committee chairs, and regional Rotary Foundation coordinators will attend a day of joint training on Friday, 18 January in San Diego followed by a second day of training on Saturday, 19 January for district Rotary Foundation committee chairs. Registration and travel details will be available in the coming months. Note: Participants must make travel arrangements through RITS; participants are not authorized to book travel at this time.

At this training, districts will have the opportunity to learn from each other. While your district 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](#) (*NEW* Launch version will be available by 1 August under related documents). 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 and packaged grant applications open**

Clubs and districts will be able to log in to Member Access to see the new applications for global grants and packaged grants. Applications will be processed by the Foundation beginning April 2013.

February-June

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 ***NEW*** [grant management seminars](#) are scheduled and promoted to clubs.
- Consider what additional qualification requirements, if any, your district will implement for district grants.
- 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.

Submit applications for 2012-13 Matching Grants and District Simplified Grants by 31 March

Nonpilot districts must submit applications for Matching Grants and District Simplified Grants applications by 31 March.

April

Qualified clubs and districts can begin applying 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. Reporting rule/payment contingency: Districts may have one open DSG, but must have successfully reported on at least 50 percent of the grant.
 - ***NEW*** E-learning modules are being developed to allow Rotarians to preview the new grant applications. Go to learn.rotary.org and view the course titled New Foundation Grants: Member Access.
- Note that applications that are processed starting in April will receive funding starting 1 July.
- 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 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.