

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. The new grants allow Rotarians to change people's lives, make the world better, and meet the five core values of our strategic plan. To prepare your district to begin participating on 1 July 2013, review the following timeline of major events and see the related tasks that follow:

Learn in 2011-12

January 2012	International Assembly
February-June	Begin planning for 2012-13
May	RI Convention workshop

Train, Qualify & Prepare in 2012-13

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
January 2013	International Assembly
	Begin online qualification process
February	Begin training and qualifying clubs
February-June	Begin applying for Rotary Foundation grants online
	Ensure that reports are submitted for all Rotary Foundation grants and programs
June	RI Convention workshop

Participate in 2013-14

1 July 2013	Global launch of new Rotary Foundation grant making model
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Because the Future Vision Plan is still in its pilot phase, the grant guidelines may change before global launch. Check www.rotary.org for the latest information.

Learn - 2011-12

January 2012

International Assembly

Governors-elect attend the Future Vision workshop as part of the 2012 International Assembly. To get the most out of the session in San Diego, governors-elect should work with their district leaders to complete the following tasks:

- Learn as much as you can about the Future Vision Plan. Read about Future Vision on the [RI website](#), sign up for the [Future Vision newsletter](#), and view [e-learning modules](#).
- Review the [District Rotary Foundation Committee Manual](#). Strengthen your district and club Rotary Foundation committees. Make sure that you are appointing motivated, knowledgeable individuals to serve on Foundation committees and that you are building a base of future district committee members at the club level.
- Read the [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#).
 - Determine whether your existing projects would better qualify for global grants or district grants. Consider what changes would need to be made for projects to qualify for global grants.
 - Review your district's process for District Simplified Grants. Consider how your district will implement its district grant, including collecting project submissions from clubs, and how you will communicate those changes.
 - Incorporate elements of [sustainability](#) and measurability into project design, align projects with the [areas of focus](#), and look for opportunities for clubs to work together on larger grants with a minimum US\$30,000 project budget.
 - 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 January 2012 for study in 2013-14. Global grant scholarship proposals and applications are accepted on a rolling basis throughout the year, although applications and payment information should be submitted at least three months before studies begin in order to allow adequate time for Foundation review and processing.
 - Discuss the district's policy on distributing the District Designated Fund (DDF). For example, which projects will receive funding, who will review proposals, what percentage of DDF will go toward district grants, and how the district will report to their clubs on the use of DDF.
- Become familiar with the [district memorandum of understanding](#) (MOU). Determine what your district is already doing and which processes you'll need to have in place to implement the MOU. (Note: Indian districts should refer to [this version](#).)
- Review the [Grant Management Leaders' Guide](#) to begin planning the logistics for grant management seminars.
- Prepare a list of questions for your district governor-elect to bring to the International Assembly.

February-June 2012

Begin planning for 2012-13

Districts continue to 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 onwards. 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 Future Vision.
- Consider developing a relationship with a [pilot district](#) to share experiences. Ask your regional Rotary Foundation coordinator to connect you with pilot districts and any questions you have regarding the new grant structure.
- Train club leaders at PETS and 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 determine the processes that will need to be in place to implement the MOU.
 - Explain how clubs will need to qualify to apply for global grants by attending a grant management seminar between February and June 2013. For additional information, clubs can review the [Grant Management Manual](#).

May 2012

RI Convention workshop

Attend a workshop on the Future Vision Plan at the RI Convention, 3-6 May, in Bangkok, Thailand.

Train, Qualify & Prepare - 2012-13

1 July 2012

Appoint a district Rotary Foundation committee chair

As a one-time exception, consider appointing a new district Rotary Foundation committee chair (DRFC) 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. District leaders should appoint a DRFC who could attend training associated with the Rotary institutes, attend training at the 2013 International Assembly, and begin the 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 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 complete the following tasks before attending their 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](#).
- View the following e-learning modules:
 - [Future Vision: An Overview](#)
 - [Grant Management](#)
 - [Member Access: District Qualification](#)
 - [Foundation Funding](#)
- Read the [district memorandum of understanding](#) (MOU). Create a plan to implement the MOU. (*Note: Indian districts should refer to [this version](#).*)
- Attend district webinars on Rotary Foundation grants provided by The Rotary Foundation.

January 2013

International Assembly

District governors-elect, district Rotary Foundation committee chairs, and regional Rotary Foundation coordinators will attend a joint day of 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.
- View the following e-learning modules:
 - [Choosing a Grant](#)
 - [Developing Global Grants](#)
 - [Project and Activity Sustainability](#)
 - [Areas of Focus: An Overview](#)
 - [Vocational Training Teams](#)
 - [Rotary Scholarships](#)
- Prepare a list of questions for your district governor-elect to bring to International Assembly.

Complete online qualification process

Districts complete the online district [qualification](#) process in order to apply for Rotary Foundation grants (the updated online system for qualification and grant applications is expected to launch in January). Be prepared to fill out the information by completing the following steps:

- Read the [district memorandum of understanding](#) (MOU). (Note: Indian districts should refer to [this version](#).)
- View the e-learning module [Member Access: District Qualification](#).

February-June 2013

Train and qualify clubs, and train assistant governors, and other members of the district team

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.

Begin applying for Rotary Foundation grants online

Before applying for grants:

- Ensure that clubs and districts are qualified.
- In April, 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.
- View the following e-learning modules:
 - [Member Access: District Grant Application](#)
 - [Member Access: Global Grant Proposal](#)
 - [Member Access: Global Grant Application](#)
- Begin implementing processes to manage new grants.
- If your district is having difficulties with the transition, contact your regional Rotary Foundation coordinator for assistance.

Ensure that reports are submitted on all Rotary Foundation grants and programs

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

- Once a grant is finished, be sure to report on it promptly and close it. Districts cannot have more than 10 open grants of any type, including Matching Grants, 3-H Grants, District Simplified Grants, global grants, and district grants.
- If your district has one open District Simplified Grant, make sure you've submitted complete and accurate reports for at least half of the open grant. Reporting for district-sponsored Matching Grants must also be current.
- Submit final reports for Ambassadorial Scholarships and Group Study Exchange teams.
- Celebrate your district's successes in Ambassadorial Scholarships, Group Study Exchange, and humanitarian grants. Recognize program participants, and encourage them to continue to shape The Rotary Foundation.

June 2013

RI Convention workshop

Attend a workshop on Rotary Foundation grants at the convention.

Participate - 2013-14

1 July 2013

Global launch of new Rotary Foundation grant making model

All Rotary clubs and districts can participate!