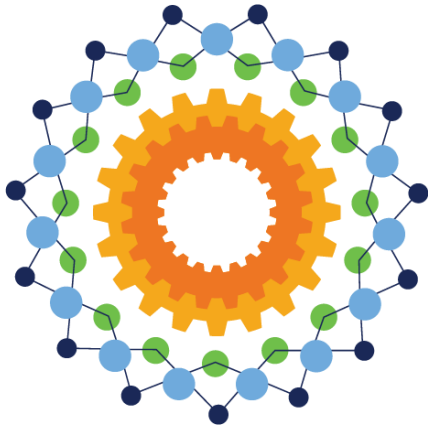




**ROTARY**  
**CHARITIES**  
*Resources for change.*

# **Grant Guidance Document All Applicants**

Rotary Charities of Traverse City  
231-941-4010  
[info@rotarycharities.org](mailto:info@rotarycharities.org)  
[rotarycharities.org](http://rotarycharities.org)

Revised 11/24/25

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# ROTARY CHARITIES OF TRAVERSE CITY ORGANIZATIONAL OVERVIEW



Rooted in Northwest Lower Michigan, Rotary Charities of Traverse City is a place-based funder committed to supporting the conditions people and the environment need to thrive.

**VISION** We envision communities that are adaptive and thriving for everyone.

**MISSION** Working in partnership with changemakers, Rotary Charities provides funding, learning, and connections to address our region's complex problems and create community assets for all.

## GRANTS AT A GLANCE

| GRANT CATEGORY                        | PURPOSE                                                                                                                                          | APPLICATION DEADLINES                     | REQUEST AMOUNT & DURATION                     | STAFF CONTACT                                                                                      |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|-----------------------------------------------|----------------------------------------------------------------------------------------------------|
| Assets for Thriving Communities (ATC) | Support initiatives that develop, strengthen or build community assets that are available to all, or make existing assets more widely available. | First Business Day of March and September | Up to \$50,000 total<br>1 - 3 years           | <a href="#">Mi Stanley</a>                                                                         |
| Systems Change Accelerator (SCA)      | Support collaborative innovation(s) that target root causes of complex community problems.                                                       |                                           | Up to \$150,000 total<br>2 - 3 years          | <a href="#">Freya Bradford</a>                                                                     |
| Seed Grant                            | Support early-stage or adaptive efforts related to physical assets or infrastructure projects, program development, or systems change.           | 1 <sup>st</sup> of the month              | Up to \$15,000 total<br>1 year                | Community Assets: <a href="#">Mi Stanley</a><br><br>Systems Change: <a href="#">Freya Bradford</a> |
| Learning Fund                         | Supports access to professional development to enhance skills, knowledge, and capacity.                                                          | Ongoing                                   | Up to \$500/individual and \$2,000/team of 4+ | <a href="#">Kendra Luta</a>                                                                        |

### APPLICATION TIMELINES – ASSETS FOR THRIVING COMMUNITIES, SYSTEMS CHANGE ACCELERATOR, SEED GRANT

|                                   | ASSETS FOR THRIVING COMMUNITIES & SYSTEMS CHANGE ACCELERATOR | SEED GRANT                                    |
|-----------------------------------|--------------------------------------------------------------|-----------------------------------------------|
| Pre-Grant Meeting                 | <b>Required before application</b>                           | <b>Required before application</b>            |
| Applications Due in Online Portal | First Business Day of March and September (11:59pm)          | 1 <sup>st</sup> of any month                  |
| Review Meeting                    | Fall: Completed mid-October<br>Spring: Completed mid-May     | N/A                                           |
| Final decision and notification   | Fall: Early November<br>Spring: Early June                   | First week of the month following application |

## GENERAL FUNDING REQUIREMENTS

**Please note:** Adherence to these requirements does not guarantee eligibility or that a grant request will be funded. Pre-grant meetings with staff are a required first step in our grant application process. Grant decisions are made by the Rotary Charities Board based on current priorities and availability of funds. See the Application & Review Process in each grant category section for more details.

### ORGANIZATIONAL ELIGIBILITY – ALL GRANT TYPES

Eligible applicants for funding include 501(c)(3) tax-exempt organizations, the Grand Traverse Band of Ottawa and Chippewa Indians, local units of government, and local school districts serving **Antrim, Benzie, Grand Traverse, Kalkaska and Leelanau Counties**.

Private foundations and individuals are not eligible for grant funding.

Start-up organizations are not eligible for Rotary Charities grants. Prior to applying, the applicant should have: 501(c)(3) status and have been providing services for at least one year.

For all grant categories, applications from a unit of government, an organization serving as a fiscal sponsor, or a school district must attach documentation of approval by the governing body that is ultimately responsible for the grant funds and implementation.

### FISCAL SPONSORSHIP

Other applicants, including partnerships and networks, are encouraged to apply using an eligible applicant as a fiscal sponsor. Applicants applying under a fiscal sponsor must provide a signed fiscal sponsorship agreement. More information about fiscal sponsorship, including sample agreements, can be found at:

- [Council on Nonprofits - Fiscal Sponsorship](#)
- [National Network of Fiscal Sponsorships Guidelines for Comprehensive Fiscal Sponsorship](#)

### REQUEST ELIGIBILITY

It is allowable to have active grants in one of the biannual categories – Assets for Thriving Communities or Systems Change Accelerator – concurrent with a grant in one of the monthly categories – Seed Grants and Learning Fund. Current grants must be closed to apply for a new grant in the same category.

Direct applicants may not submit more than one application in one category during the same grant cycle. Organizations serving as a fiscal sponsor may be able to submit more than one application for different initiatives with prior approval from Rotary Charities staff.

Proposals from faith-based organizations **must** address community needs or enhance the quality of life for citizens of the region and:

- Have a clearly demonstrated public benefit
- Be fully accessible to people regardless of their individual religious creed or convictions
- Respect diversity of religious and spiritual beliefs of all individuals

Proposals **will not be considered** for any religious programs or services that:

- Require a person to hold or accept a particular religious belief, doctrine or creed as a condition to receive services
- Primarily addressing spiritual needs
- Have evangelism as the primary purpose of the program

No part of a grant may be used for, or applied to:

- Work completed **prior to** an award. This includes, but is not limited to: debt service, unpaid invoices, and staff or consultant time.
- Endowment funds, unless such support is considered necessary to carry out other Rotary Charities objectives.

Grants to school districts will be directed to programs and facilities that serve the entire district and not benefit only a single building. Grants for school curriculum will generally not be considered.

Requests or grants to meet immediate short-term emergency needs of clients (for rent payment, gas money, food, etc.) will generally not be considered.

### **APPLICATION ASSISTANCE**

If you encounter any issues while completing the online application, please reach out to [Kendra Luta](#) for assistance.

# GRANT CATEGORIES

## ASSETS FOR THRIVING COMMUNITIES

### CATEGORY OVERVIEW – ASSETS FOR THRIVING COMMUNITIES

Community assets that are available to everyone are the building blocks of a fair, thriving and resilient region. Our Assets for Thriving Community grants support the infrastructure & initiatives our neighbors need.

#### WHAT WE FUND

We support initiatives that develop, strengthen, or enhance community assets that are accessible to all or expand the reach of an existing asset. This grant category is designed for capital projects and programmatic initiatives that have already completed substantial groundwork, including community engagement, building relationships with stakeholders, and conducting research to inform their strategy.

Community input is vital in identifying what is best for our communities, and we prioritize assets that have been recognized by stakeholders as important to improving quality of life. Applicants are encouraged to demonstrate a strong community engagement strategy and a transparent decision-making process. Please note that this category is not typically intended to fund the engagement process itself. If your project focuses on community engagement, we recommend considering a Seed Grant instead.

| POTENTIAL GRANT USES<br><i>Including but not limited to:</i>                                                                                |                                                                         |
|---------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| Multi-modal transportation<br>Affordable housing<br>Accessible recreation<br>Arts & culture<br>Energy (efficiency, conservation, renewable) | Child welfare<br>Land preservation<br>Health and wellbeing<br>Education |

#### DEADLINE

Fall Cycle: September 1  
Spring Cycle: March 1

#### AMOUNT AND DURATION

Requests up to \$50,000 total, disbursed over 1 to 3 years.

#### APPLICATION QUESTIONS & SCORING CRITERIA

You can prepare for your application by reading through the application questions and scoring criteria.

[Download Assets for Thriving Communities Application Questions Word Document](#)  
[Assets for Thriving Communities Grant Scoring Criteria](#)

#### REFERENCES

All ATC applicants are asked to provide the names and contact information for three references who can speak to the need for the proposed project or initiative. References should not be board or staff from the applicant agency, or an organization that stands to financially benefit from the award.

## NEXT STEPS

Review the Application and Review Process below.

Then, contact Mi Stanley to set up a time to discuss your project: [mstanley@rotarycharities.org](mailto:mstanley@rotarycharities.org)

## APPLICATION PROCESS – ASSETS FOR THRIVING COMMUNITIES

### Review Eligibility & Guidelines

Before applying for a **Seed, Assets for Thriving Communities, or Systems Change Accelerator** grant, carefully review this document to ensure you understand eligibility, requirements, and the application process.

### Pre-Grant Meeting

Before beginning your application, it is essential to discuss your initiative with our team. Schedule a meeting with the staff contact corresponding to the grant category you intend to apply for. This conversation ensures your proposal aligns with our funding priorities and provides an opportunity to address any questions you may have.

### Application Preparation

To prepare for your application, we encourage you to download the [application questions](#) and review the [scoring criteria](#) in advance. Understanding the required information will help you craft a strong proposal.

### Application Submission

Following your pre-grant meeting, our staff will provide you with a link to submit your application electronically. Ensure that all required materials are included and submitted by the deadline.

### Application Assistance

If you encounter any issues while completing the online application, please reach out to [Kendra Luta](#) for assistance.

## REVIEW PROCESS – ASSETS FOR THRIVING COMMUNITIES

After an **Assets for Thriving Communities** or **Systems Change Accelerator** grant application is submitted, it undergoes a multi-step review process:

**Staff & Board Review** – Two members of the Rotary Charities staff and two members of Rotary Charities board review the application and score it based on the [Scoring Criteria](#).

**Volunteer Review** – The full application and review summary are then evaluated by two Rotarian volunteer reviewers.

**Applicant Response** – If reviewers have questions, they will be compiled, and applicants will have the opportunity to respond in writing and/or during the review meeting.

**Review Meeting** – A review meeting via Zoom is held with the applicant and the review team. Following the meeting, the review team debriefs and determines a funding recommendation to be considered by the Board of Trustees.

**Final Decision** – The Rotary Charities Board of Trustees makes final funding decisions at their June (Spring applications) or November (Fall applications) meeting.

**Notification** – Applicants are typically notified of funding decisions within days of the Board meeting.

# SYSTEMS CHANGE ACCELERATOR

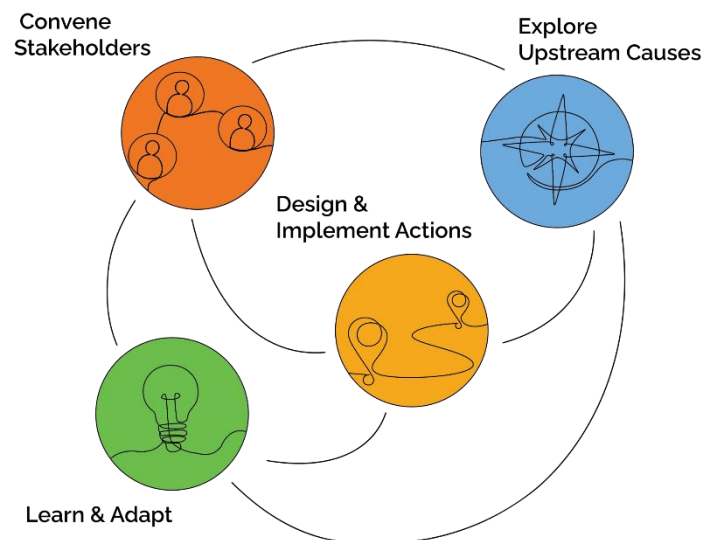
## CATEGORY OVERVIEW – SYSTEMS CHANGE ACCELERATOR

We support collaborative initiatives that target the root causes of complex problems. Our Systems Change Accelerator grants invest in problem solving that is different from business as usual, shifting resources, structures, and mindsets for lasting change.

Rotary Charities believes that for our communities to thrive we need to tackle our most entrenched, **complex problems at their roots**. Many interconnected factors together often end up producing results nobody wants – poverty, climate change, health inequities, homelessness. To begin to solve these problems and not just keep treating the symptoms over and over again, we believe we must apply a different problem-solving approach that aims at systems change.

### A Systems Change Approach

There are many frameworks and approaches to systems change; we do not prescribe any one. However, four key strategies are at the heart of most approaches. First changemakers **convene** and **commit** to other stakeholders in the system, including those most affected by the issue, **see the system** around a problem together, **design and implement actions** that **change that system** so it functions differently, and **learn all along** the way and adapt accordingly. The intended impact of systems change is both durable and broad progress on a complex problem, beyond what any one organization could achieve alone.



### Grant Purpose

Most of the work in the social sector targets the people or environments *experiencing* a problem to help them transcend the problem. These efforts are critical if we have systems that are not working for everyone. But, if this is all we do, our problems will persist. Systems change strategies offer an upstream complement by targeting the systemic factors *creating* the problem.

Rotary Charities System Change Accelerator Grants are awards intended to support innovations that **target root causes of complex community problems** leading to a more fair, thriving and resilient region.

These grants support systems change strategies that **restructure how things work** and aim to change policies, practices, relationships, resource flows, relationships, power and mental models so that fewer and fewer people or environments ever experience a problem.

Powerful strategies involve a **constellation of actions**: multiple, complementary actions carried out by stakeholders throughout the system. They create greater equity in a system by considering who experiences the problem most severely and designing actions that intentionally target the roots of those inequities.

### What complex problems are we interested in?

We do not limit funding to specific areas, but rather are open to any that, if addressed, will lead to a more fair, thriving, and resilient region for all. Ideally, applicants will know the following about the problem they are targeting before applying:

- The status of the complex problem, how many are experiencing it or are affected by it, what groups of people are affected most by the problem and why;
- What the typical approach to the problem has been, what has been tried, what is the “status quo;”
- Why this is a good time to disrupt this status quo. Systems will naturally uphold the status quo until they must change. Systems change efforts are most successful when the timing is right for change.

### What work is required before an application?

This grant category is meant for teams that have done some significant groundwork together prior to applying. Rotary Charities supports all stages of systems change work. However, for this grant, applicants will apply **after** they have come together with other diverse stakeholders, looked at what may be causing the current levels of the complex problem they are addressing, found potential leverage points and designed a constellation of actions that will act on those leverage points to change the system that is creating the problem.

Our **Seed Grants** can fund early aspects of a systems change process such as:

- Convening stakeholders to better understand a community problem
- Planning or piloting new strategies and/or aligning actions with others
- Assessing and building the capacity of organizations, partners, or networks to move forward together
- Network convening around a complex community issue
- Organization, partner, or network development activities

For complete details about our Seed Grants and their potential funding uses, please see the Seed Grant Category Overview in this document.

Our **Learning Fund** is also available as a resource to support pursuing systems change-related education or professional development opportunities. More information about our Learning Fund, including eligibility and the application link, is [available on our website](#).

### The Targets of System Change

- Policies
- Practices
- Resource Flows
- Relationships and Connections
- Power Dynamics
- Mental Models

*John Kania, Mark Kramer, and Peter Senge. “The Waters of Systems Change.” FSG, June 2018.*

[https://www.FSG.org/publications/water\\_of\\_systems\\_change](https://www.FSG.org/publications/water_of_systems_change)

To get more familiar with these concepts, you may want to review some of the definitions and resources highlighted at the end of this document. We also offer workshops and other learning opportunities throughout the year. You can find out about those by [signing up for our newsletter](#) and visiting our [Learning Experiences page](#). If you are ready to go a little deeper, your team may want to sign up for a free online course called [Systems Practice: How to move from Impossible to Impact](#), [Ashoka's Systems Change Crash Course](#), or courses through the [School of Systems Change](#). Rotary Charities offers free coaches to teams who are interested in taking a course. Contact Freya Bradford to learn more, [fbradford@rotarycharities.org](mailto:fbradford@rotarycharities.org). **These courses are suggested as resources that may be helpful. We do not prescribe any precise approach to systems change** and are open to considering any process of system change that meets our criteria.

## POTENTIAL GRANT USES

Grants may be for **a constellation of actions by several organizations** aimed at leverage points for the same problem. Grants can be used for innovations that are intended to change systems by shifting the underlying structures that keep problems in place: changes in system processes, policies, resource flows, relationships, power structures, and mindsets.

The actions that will change a system are unique to the context of that system. Some actions that have been funded in previous years:

- Convening of cross-sector networks that are working together to share information and best practices, align work more effectively, experiment with new innovations and learn
- Advocacy work to increase public or legislative support
- Communication work to change public narratives about a problem or solution
- Stipends to compensate stakeholders experiencing a problem to participate in creating solutions
- Creating new standards for data collection, sharing and use between organizations

### EXAMPLE Provided by Housing North Complex Community Problem: Lack of affordable housing in the region

| System/Context around the problem                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Proposed Constellation of Actions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>A network of diverse stakeholders explored the context surrounding the region's affordable housing crisis and found that factors were working together in a way that is creating several confounding patterns:</p> <ul style="list-style-type: none"> <li>- The cost of development is high</li> <li>- The return on investment for affordable workforce housing is extremely low</li> <li>- The process of development is extremely complex</li> <li>- The perception of the problem at the public level and the legislative level are</li> </ul> | <p>An organizing entity will work to align and support the actions of several partner organizations to:</p> <ul style="list-style-type: none"> <li>- Develop and share local data and public messaging about the problem</li> <li>- Advocate for enabling legislation at the state level that will increase local governmental tools and subsidies</li> <li>- Provide education and resources to local governments and the public on long-term development costs and procedures</li> <li>- Provide education and resources to developers on community goals and best practices for development in this region</li> </ul> |

|                                                          |                                                                                                                                                                                                                                                                                                                             |
|----------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| often inaccurate and working against potential solutions | <ul style="list-style-type: none"> <li>- Provide developers, employers and communities with one-stop information and expertise to navigate the development process from pre-development to post-development compliance activities</li> <li>- Aid developers in accessing and braiding multiple financing sources</li> </ul> |
|----------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## LEARNING – A SHARED COMMITMENT

Systems change as an intentional approach to social change is relatively new. Not many funders and changemakers are organizing their work in this way. We believe that learning together as we go **must be a shared commitment**. We ask that applicants demonstrate a commitment to learning by **designating a Learning Steward from your team and budgeting for their time** (grant funds be used for this person's time). You are encouraged to designate a Learning Steward from an organization that is not the primary fiscal agent for this proposal.

The Learning Steward will commit to:

- Join a **Systems Change Community of Practice** with other grantees that meets quarterly (other team members are welcome as well but not required). The Community of Practice is a facilitated group focused on learning and co-designed around the needs of the cohort.
- Work with Rotary Charities staff and consultants to create processes custom to your team that will help you collect information and stories that will document your team's unique learning journey, and help us all notice early signals of a changing system together.
- Capture and share your team's unique learning journey.

Rotary Charities is committed to:

- Provide facilitation for the Community of Practice that will create a brave space to share and explore successes and challenges.
- Work with Learning Stewards to articulate processes that will help document each team's learning.
- Amplify each team's story (with permission) through our communications channels. We hope to help inspire others, build the body of knowledge around this type of work, and attract more resources.

## DEADLINE

Fall Cycle: September 1

Spring Cycle: March 1

## AMOUNT AND DURATION

Up to \$150,000 total disbursed over 2 to 3 years.

## APPLICATION QUESTIONS & SCORING CRITERIA

You can prepare for your application by reading through the application questions and scoring criteria.

[Download Systems Change Accelerator Application Questions Word Document](#)  
[Systems Change Accelerator Grant Scoring Criteria](#)

## REFERENCES

All SCA applicants are asked to provide the names and contact information for three references who can speak to the need for the proposed project or initiative. References should not be board or staff from the applicant agency, or an organization that stands to financially benefit from the award.

## NEXT STEPS

Review the Application and Review Process below.

Then, contact Freya Bradford to set up a meeting to discuss your initiative: [fbradford@rotarycharities.org](mailto:fbradford@rotarycharities.org).

## APPLICATION PROCESS – SYSTEMS CHANGE ACCELERATOR

### Review Eligibility & Guidelines

Before applying for a **Seed, Assets for Thriving Communities, or Systems Change Accelerator** grant, carefully review this document to ensure you understand eligibility, requirements, and the application process.

### Pre-Grant Meeting

Before beginning your application, it is essential to discuss your initiative with our team. Schedule a meeting with the staff contact corresponding to the grant category you intend to apply for. This conversation ensures your proposal aligns with our funding priorities and provides an opportunity to address any questions you may have.

### Application Preparation

To prepare for your application, we encourage you to download the [application questions](#) and review the [scoring criteria](#) in advance. Understanding the required information will help you craft a strong proposal.

### Application Submission

Following your pre-grant meeting, our staff will provide you with a link to submit your application electronically. Ensure that all required materials are included and submitted by the deadline.

### Application Assistance

If you encounter any issues while completing the online application, reach out to [Kendra Luta](#) for assistance.

## REVIEW PROCESS – SYSTEMS CHANGE ACCELERATOR GRANTS

After an **Assets for Thriving Communities** or **Systems Change Accelerator** grant application is submitted, it undergoes a multi-step review process:

**Staff & Board Review** – Two members of the Rotary Charities staff and two members of Rotary Charities board review the application and score it based on the [Scoring Criteria](#).

**Volunteer Review** – The full application and review summary are then evaluated by two Rotarian volunteer reviewers.

**Applicant Response** – If reviewers have questions, they will be compiled, and applicants will have the

opportunity to respond in writing and/or during the review meeting.

**Review Meeting** – A review meeting via Zoom is held with the applicant and the review team. Following the meeting, the review team debriefs and determines a funding recommendation to be considered by the Board of Trustees.

**Final Decision** – The Rotary Charities Board of Trustees makes final funding decisions at their June (Spring applications) or November (Fall applications) meeting.

**Notification** – Applicants are typically notified of funding decisions within days of the Board meeting.

# SEED GRANTS

## CATEGORY OVERVIEW – SEED GRANTS

Seed Grants support early-stage or adaptive efforts related to physical assets or infrastructure projects, program development, or systems change.

### WHAT WE FUND

Seed Grants fund the beginning stages of projects with the potential for broad community impact that may eventually be strong applicants for an Assets for Thriving Communities grant, or a Systems Change Accelerator grant.

Finding the way into deeper collaboration, learning and adapting often requires that we pause and take stock of where we are and where we want to go. Whether you're developing a new community asset or trying to change an entrenched system, new ways of working may require coaching, consulting, and facilitated processes. Seed Grants can help support this type of groundwork that must happen before the rubber ever meets the road. You have heard us and others say, "go slow to go fast." Seed Grants are part of our "patient capital" that helps build strong foundations for deeper impact.

### POTENTIAL GRANT USES

*Eligible uses include, but are not limited to, the following activities:*

#### Exploration, Experimentation & Design

- Planning and development of new or adapted initiatives
- Piloting or prototyping approaches
- Feasibility studies, needs assessments, market analyses
- Systems mapping and other learning or sensemaking activities
- Assessing and building the capacity of partners or networks to move forward together
- Designing inclusive decision-making structures and co-creation with people with lived experience

#### Pre-Development for Capital Projects

- Visioning and prioritizing for community projects
- Site assessments and preparation
- Design charrettes and planning with architects, users, etc.
- Architectural or structural drawings or plans
- Environmental or cultural impact exploration

#### Community & Stakeholder Engagement

- Convening stakeholders or cross-sector partners
- Facilitating community planning or engagement processes
- Developing partnership agreements or exploring governance or stewardship models for collective work
- Advocacy planning and messaging development
- Framing, storytelling, and other narrative strategies

#### Organizational Adaptation & Readiness

- Scenario planning for strategic repositioning
- Risk management, business continuity preparedness, or succession planning
- Revenue diversification or fund development strategy
- Organizational restructuring, shared services, or mergers
- Financial dashboard development or systems upgrades

- Data management transitions to improve agility or security
- Translating and adapting tools, materials, or processes for accessibility and equity

### **Wellbeing & Organizational Culture Change**

- Piloting policies and practices that support balance and renewal (e.g., flexible scheduling, collective rest, workload tools)
- Training, coaching, or facilitated processes to strengthen leadership and organizational culture
- Peer support, team rituals, or connection practices that build belonging and resilience
- Equity-centered initiatives such as pay/benefits reviews, inclusive benefit pilots, or shared decision-making structures

### **DEADLINE**

1<sup>st</sup> of any month

### **AMOUNT & DURATION**

Up to \$15,000, 1 year grant period.

### **APPLICATION QUESTIONS & SCORING CRITERIA**

You can prepare for your application by reading through the application questions and scoring criteria. [Download Seed Grant Application Questions Word Document](#) and [Seed Grant Scoring Criteria](#)

### **NEXT STEPS**

Review the Application and Review Process below.

Then, contact [Mi Stanley](#) for Assets-related requests, and [Freya Bradford](#) for Systems Change-related requests.

## **APPLICATION PROCESS – SEED GRANTS**

### **Review Eligibility & Guidelines**

Before applying for a **Seed, Assets for Thriving Communities, or Systems Change Accelerator** grant, carefully review this document to ensure you understand eligibility, requirements, and the application process.

### **Pre-Grant Consultation**

Before beginning your application, it is essential to discuss your initiative with our team. Schedule a meeting with the staff contact corresponding to the grant category you intend to apply for. This conversation ensures your proposal aligns with our funding priorities and provides an opportunity to address any questions you may have.

### **Application Preparation**

To prepare for your application, we encourage you to download the [application questions](#) and review the [scoring criteria](#) in advance. Understanding the required information will help you craft a strong proposal.

### **Application Submission**

Following your pre-grant meeting, our staff will provide you with a link to submit your application electronically. Ensure that all required materials are included and submitted by the deadline.

### **Application Assistance**

If you encounter any issues while completing the online application, reach out to [Kendra Luta](#) for assistance.

## REVIEW PROCESS – SEED GRANTS

After a **Seed Grant** application is submitted, it is reviewed through the following process:

**Staff Review** – Two members of the Rotary Charities staff review the application and score it based on the [Scoring Criteria](#). Any questions that arise will be compiled, and the applicant can respond in writing.

**Funding Recommendation** – A written summary of the staff review and a funding recommendation will be provided to the Board of Trustees for consideration at their monthly meeting.

**Notification** – Applicants are typically notified of funding decisions within a month of submission

# LEARNING FUND

## CATEGORY OVERVIEW – LEARNING FUND

The Learning Fund supports changemakers and teams in accessing professional development opportunities that enhance their skills, knowledge, and capacity to drive meaningful change in their communities.

### WHAT WE FUND

We provide financial support to remove barriers to learning experiences that align with Rotary Charities' guiding principles and contribute to the growth and development of individuals and organizations. Eligible opportunities include workshops, trainings, conferences, coaching, peer learning, and other professional development activities.

### Exclusions:

- The Learning Fund does not support programs already underwritten by Rotary Charities (e.g., Leadership Learning Lab, Leadership Coaching Cohort, Fund Development Cohort, or other funded opportunities).
- Funding is not available for:
  - School tuition or material expenses
  - Strategic planning activities
  - Reimbursements or debts
  - Travel or lodging expenses

### AMOUNT AND DURATION

Learning Fund grants are one-time awards for a specific learning opportunity. Individuals may apply for up to \$500. Teams of 4 or more are eligible for up to \$2,000 per Rotary Charities' fiscal year (July through June).

### DEADLINE

Learning Fund requests are accepted on a rolling basis throughout the year. Applications must be submitted at least 2 weeks before the learning activity begins.

### NEXT STEPS

Review the [Application and Review Process](#) below, and then [apply](#) via the online form. Contact [Kendra Luta](#) with questions.

## APPLICATION AND REVIEW PROCESS – LEARNING FUND

**Review Eligibility & Guidelines** – Before applying, carefully review the [Learning Fund](#) eligibility criteria and guidelines to ensure your request aligns with the grant category. Requests must be submitted prior to the start date of the activity, as Rotary Charities cannot provide funding or reimbursement for activities that are already underway or have already occurred.

**Prepare Your Application** – Gather necessary information, including details about the learning opportunity, expected outcomes, and how it aligns with Rotary Charities' guiding principles.

**Submit Your Application** – Complete the online application form, available year-round, and provide all required documentation before the activity start date.

**Confirmation of Submission** – You will receive an email confirming that your application has been received.

### Application Assistance

If you encounter any issues while completing the online application, reach out to [Kendra Luta](#) for assistance.

**Initial Screening** – Applications are reviewed for completeness and eligibility. If additional information is needed, applicants may be contacted for clarification.

**Evaluation** – Applications are assessed based on alignment with Rotary Charities' guiding principles, potential impact, feasibility, and the availability of funds in relation to individual and organizational annual funding limits.

**Decision Notification** – Applicants will receive notification of approval or denial within two weeks, typically sooner.

**Funding Disbursement** – Approved requests will be processed during the next regularly scheduled check run at the middle or end of the month. Payments will be made to organizations, not individuals.

**Post-Learning Survey** – Participants must complete a brief Learning Fund Evaluation Survey within 30 days of completing the learning experience. Survey results help us improve and adapt the program to better support future applicants.

## GRANT CRITERIA

Over the years, we've learned from our grantees that the most impactful projects are those that are driven by a commitment to meaningful partnerships, creative problem-solving, and a willingness to evolve in response to new challenges. These values are reflected in **Rotary Charities' Guiding Principles—Inclusive, Collaborative, Resourceful, Reflective, Adaptive, and Aligned**—which shape our approach to funding and support. Our grant application questions are intentionally designed to help applicants demonstrate how their work aligns with these principles, ensuring that funded projects are well-positioned for lasting impact.

In addition to alignment of our grant criteria, decisions are also influenced by factors such as the number of applications, the amount of funding available, and broader community needs and priorities.

**Inclusive** – Sustainable solutions emerge when those most affected by an issue are involved in shaping the path forward. We prioritize approaches that center diverse perspectives, amplify community voices, and ensure decision-making power is shared.

**Collaborative** – Meaningful change happens when we work together. Whether through partnerships, shared leadership, or collective action, we support initiatives that build strong relationships and leverage the strengths of many.

**Resourceful** – The most effective solutions make the most of what is already available. We encourage creativity in using existing knowledge, assets, and infrastructure to drive sustainable impact.

**Reflective** – Growth happens when we take time to learn. We value approaches that integrate reflection into daily work, draw insights from broader contexts, and apply learning to strengthen impact.

**Adaptive** – Change is constant, and successful initiatives are built to evolve. We support efforts that embrace flexibility, test new ideas, and refine strategies based on real-time learning.

**Aligned** – We are part of a larger system, and our work is stronger when it connects to others. We invest in efforts that contribute to a shared vision, complement existing initiatives, and move toward a more just, thriving, and resilient region.

# REQUIRED ATTACHMENTS – ASSETS FOR THRIVING COMMUNITIES, SYSTEMS CHANGE ACCELERATOR, SEED GRANTS

All attachments must be submitted electronically through the online application portal.

## NONPROFIT ORGANIZATIONS

1. List of Board of Directors with affiliations
2. Applicant organization's current annual operating budget, including expenses and revenues
3. Applicant organization's last full year balance sheet
4. Most recent audit letter or financial review
  - **Organizations with operating budgets \$750,000 and over** must submit an Audited Statement.
  - **Organizations with budgets under \$750,000** may submit an Independent Review.
  - **If no audit letter or review is available**, you may attach your most recent tax return or e-postcard.
5. Most recent 990 / Postcard
6. Project/Initiative Budget (*only upload if budget form embedded in application is not used* – see Appendix 2 for a template of the form embedded in the application)
7. Current logo & project photos
8. If Applicable: Memorandums of Understanding, fiscal sponsorship agreements, Letters of Intent or other indications of collaboration from all participating entities, and/or Statements of Work from consultants or coaches. (General Letters of Support are not accepted)

**Optional:** Budget Narrative describing the expenses in the project/initiative budget

## GOVERNMENTAL AGENCIES, FISCAL SPONSORS OR SCHOOL DISTRICTS

1. List of elected officials
2. Summary of the current operating budget, including expenses and revenue for the appropriate department budget
3. Most recent independent audit
4. Project/initiative budget (*only upload if template embedded in the application is not used*)
5. Copy of the minutes of the meeting or board resolution from the body that has the ultimate authority to implement the grant (usually this is the board of elected officials versus the appointed board).
6. Current logo & project photos
7. If applicable: Memorandums of Understanding, Letters of Intent and other indications of collaboration from all participating entities. General Letters of Support are not accepted.

**Optional:** Budget Narrative describing the expenses in the project/initiative budget

## **APPENDIX 1: APPLICATION QUESTIONS — ASSETS FOR THRIVING COMMUNITIES, SYSTEMS CHANGE ACCELERATOR, SEED GRANTS, LEARNING FUND**

You can prepare for your application by reading through the application questions.

[Download Systems Change Accelerator Grant Questions Word Document](#)

[Download Assets for Thriving Communities Grant Questions Word Document](#)

[Download Seed Grant Questions Word Document](#)

[Learning Fund Application Web Form](#)

# APPENDIX 2: SCORING CRITERIA – ASSETS FOR THRIVING COMMUNITIES, SYSTEMS CHANGE ACCELERATOR, SEED GRANTS

Assets for Thriving Communities & Systems Change Accelerator applications are reviewed and scored by staff and board, with the support of Rotarian volunteers. Seed applications are reviewed and scored by staff only. All final decisions to fund applications are made by the Rotary Charities board of directors. The following criteria will each be scored from 1 to 5 using the following scale. Application questions have been designed to elicit responses to the bullets under each criterion.

In addition to alignment of our grant criteria, decisions are also influenced by factors such as the number of applications, the amount of funding available, and broader community needs and priorities.

|                                                     |                                                                      |                                                                |                                                    |                                                                  |
|-----------------------------------------------------|----------------------------------------------------------------------|----------------------------------------------------------------|----------------------------------------------------|------------------------------------------------------------------|
| <b>1</b><br><b>Does Not</b><br><b>Meet Criteria</b> | <b>2</b><br><b>Mostly Does</b><br><b>Not Meet</b><br><b>Criteria</b> | <b>3</b><br><b>Somewhat</b><br><b>Meets</b><br><b>Criteria</b> | <b>4</b><br><b>Mostly Meets</b><br><b>Criteria</b> | <b>5</b><br><b>Meets or</b><br><b>Exceeds</b><br><b>Criteria</b> |
|-----------------------------------------------------|----------------------------------------------------------------------|----------------------------------------------------------------|----------------------------------------------------|------------------------------------------------------------------|

See below for Scoring Criteria specific to:  
[Assets for Thriving Communities Grants](#)  
[Systems Change Accelerator Grants](#)  
[Seed Grants](#)

## ASSETS FOR THRIVING COMMUNITIES SCORING CRITERIA

**Proposed Project:** Project meets the purpose of the category and is likely to produce the intended results:

- The project is well designed to create/expand a community asset that will help our region be more fair, thriving or resilient.
- There is evidence that the project is based on a known need/opportunity (based on data and/or a community engagement process).
- The project budget clearly aligns with the proposed project

**Alignment:** Project is well aligned with other work in the community:

- The project is aligned with other related work in the region to maximize impact.
- References are well-informed about the initiative, in full support, and believe the work will create a more fair and thriving region.

**Inclusive:** The project is inclusive of project beneficiaries:

- Those who will benefit from the project have influenced the planning or design of the proposed work.
- If a group of stakeholders has not been included, there is a plan to include them in the future.
- Project beneficiaries will be included throughout the implementation of the project.
- The asset will be equally available to all in the community; barriers to access have been addressed. Or the project will make an existing asset more available to a specific group.

**Collaborative:** The organization and project will be collaborative:

- The applicant describes a history of collaboration.
- It is clear how project partners will work together to increase the project's impact, including how decisions will be made.
- If there is a fiduciary, its role is clear, including how funds will be distributed to other partners.
- MOUs or partnership agreements are attached if grant funds will be shared with partners.

**Resourceful:** The project will be resourceful:

- Other funds, expertise and resources will be leveraged for the project.
- Existing community resources and assets will be used creatively to make the most out of what the community already has.
- Future resource needs have been considered and there is an idea how these resources may be acquired.

**Reflective:** The project has been, and will continue to be, reflective:

- The project has been informed by global, national and or local trends.
- The applicant has ideas about what will indicate progress toward their long-term vision, what they will look for and how they will find it.
- The applicant has considered the potential unintentional consequences of the success or failure of their initiative.

**Adaptive:** The project will be able to be adaptive during the grant period and after:

- Processes, mechanisms, and culture are in place that ensure they can adapt quickly to changing needs.

The project has been designed in a way that it will continue to adapt into the future.

## SYSTEMS CHANGE ACCELERATOR SCORING CRITERIA

**Proposed Initiative:** Initiative meets the purpose and requirements of the grant category, and it is likely to produce intended results:

- Addresses a complex community problem that inhibits our region's ability to be fair, thriving or resilient.
- It is a good time to intervene.
- Well designed to change systems factors like mindsets, policies, relationships, power, practices, the way resources flow.
- Seems likely the actions proposed will achieve the impact described.
- The budget clearly aligns with the proposed initiative.

**Alignment:** Work is aligned with others to maximize impact:

- Initiative is aligned with other related work in the region in order to maximize impact.
- The initiative will stay connected and amplify others doing complementary work.
- References are well-informed about the initiative, in full support, and believe the work will create a more fair and thriving region.

**System-Awareness:** Partners are aware of the system, or context, around the complex problem they aim to change:

- The initiative understands the current status of the problem - who/how many are experiencing the problem and the trends over time.
- The initiative has looked at the factors that may be enabling and inhibiting the complex problem they aim to change and how those factors are interconnected.
- The initiative has considered how all partners may be unintentionally contributing to conditions that create the need for the proposed initiative.
- The initiative has selected how they will intervene in the system based on their understanding of this context.

**Inclusive:** The initiative is inclusive of those experiencing, or most affected by, the problem:

- Those experiencing, or most affected by the problem, have been meaningfully included in the exploration of the problem and/or planning and design of the proposed work.
- If they have not been able to include all stakeholder groups, there is a plan to try to include them in the initiative going forward.
- Those experiencing, or most affected by the problem, will be included in the implementation of the initiative.

**Collaborative:** The initiative will be collaborative:

- It is clear how initiative partners will work together throughout the grant period.
  - It is clear how decisions will be made.
  - The role of the fiduciary/fiscal agent is clear, including how funds will be distributed to other partners (if applicable)
- MOUs or partnership agreements are attached.

**Resourceful:** The initiative will be resourceful:

- Other funds, expertise and resources will be leveraged for the initiative. Existing community resources and assets will be used creatively to make the most out of what the system already has.
- Future resource needs have been considered and there is an idea how these resources may be acquired.

**Reflective:** The initiative has been, and will continue to be, reflective:

- Applicant has identified two levels of impact: systemic factors and long-term change in the level of the problem.
- Applicant has identified an approach to learning and evaluation and selected a learning steward for their project.

**Adaptive:** The initiative will be able to be adaptive:

- The applicant can point to an example of adapting to new information or needs.
- Processes, mechanisms and culture are in place that ensure they can adapt quickly to changing circumstances.

### SEED GRANT SCORING CRITERIA

#### **Seed Purpose & Potential:**

The project is well-positioned to seed a future community asset or systems change effort. It reflects a meaningful and timely next step, rooted in a clear understanding of the need or opportunity. It connects to a vision for more thriving and equitable communities.

#### **Engaging Others**

The applicant is engaging people and/or organizations meaningfully through this project or in their broader work by intentionally including those most affected, and those with influence, resources, or aligned missions in ways that are appropriate to the project's goals and stage.

#### **Weaving Resources**

The applicant demonstrates awareness of and creativity in using available resources and strengths – people, knowledge, funding, or networks. The work builds on or thoughtfully connects with existing assets in ways that strengthen their chances of success.

#### **Learning & Adapting**

The applicant has clear intentions for learning and reflection. They articulate how success will be understood at this stage and show readiness to adjust based on what emerges.

## APPENDIX 3: BUDGET FORM – ASSETS FOR THRIVING COMMUNITIES, SYSTEMS CHANGE ACCELERATOR, SEED GRANTS

The project budget form is included within the application, as shown below. Systems Change Accelerator applications require a budget for each year of your project, detailing revenue and expenses. Seed and Assets for Thriving Communities grants require an overall project budget, not broken down by year if the grant period exceeds one year.

| REVENUE SOURCES                               | Committed Revenue | Pending/Anticipated Revenue |
|-----------------------------------------------|-------------------|-----------------------------|
| Foundation Requests (including this request)  |                   |                             |
| Government                                    |                   |                             |
| Individual Donations                          |                   |                             |
| Your Organization (cash)                      |                   |                             |
| In-Kind Support (your organization or others) |                   |                             |
| Other                                         |                   |                             |
| Total Committed                               |                   |                             |
| Total Pending/Anticipated                     |                   |                             |
| Revenue Notes:                                |                   |                             |

| EXPENSE SOURCES                                                       | Project Expenses |
|-----------------------------------------------------------------------|------------------|
| Personnel (including volunteer in-kind time)                          |                  |
| Contract Services (consulting, professional, fundraising, evaluation) |                  |
| Construction & Equipment                                              |                  |
| Administration (rent, utilities, insurance, travel, supplies, etc.)   |                  |
| Other                                                                 |                  |
| Total Project Expenses                                                |                  |
| Expense Notes:                                                        |                  |

### Grant Application Budget Template Instructions

- Your Project Budget should only include revenue and expenses for the time period you are requesting funding. *(Example: If you are applying for a 1-year grant, your budget should reflect the expenses and revenues for that 1-year period.)*
- If a line item on the budget does not apply to your project, you may leave it blank.
- Use "Other" only for items that don't clearly fit in other categories and specify in the narrative what's included.
- Use the Notes field for extra details about any items that are not self-explanatory. *(Examples: If you include "Foundation Requests" under Revenue, specify what foundations have been engaged. If you include "Contract Services" under Expenses, specify the type of service and who will provide it.*
- Under Personnel, include estimated staff time and volunteer time for your project. You can calculate the value of volunteer time using the current rate published by [Independent Sector](#).
- If your project budget includes contract services, please attach a scope of work or an estimate outlining the work to be completed.
- Revenue Definitions:
  - Committed: Funding that has been awarded or is contractually guaranteed
  - Pending: Funding for which you have submitted a request but have not yet received a decision.
  - Anticipated: Funding that you plan to request in the near future but have not yet applied for.

## APPENDIX 4: GLOSSARY OF TERMS WE USE

**Capacity building:** Activities that strengthen an organization's effectiveness, including training and infrastructure development.

**Capital Project:** A project that creates, improves, or extends the useful life of a physical asset, such as constructing or renovating a building, developing infrastructure, acquiring major equipment, purchasing property, or creating recreational facilities like trails or parks.

**Change the system:** Unlike direct service projects, systems change works on the underlying structures of a system by shifting processes, practices, relationships, resources, and/or policy. This also requires shifting and supporting new mindsets, building trust and deep connections to others working in the system, and engaging those most affected by the system. The intended impact of systems change is both **durable** and **broad** progress on a complex problem, beyond what any one actor could achieve alone.

**Community asset:** A resource, service, or infrastructure that improves quality of life in a community.

**Community of Practice:** Groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly. (Etienne Wenger)

**Complex community problem:** A community problem that defies any singular solution. There may be disagreement about what is causing a problem and/or what to do about it. Many factors influence complex problems that are difficult to predict and influence (political, social, economic, attitudinal).

**Context around a complex problem:** Various factors and how they are working together in a way that is creating an entrenched problem. Factors are things like policies, practices, resource flows, relationships and connections, power dynamics, and mental models.

**Fiscal sponsorship:** A formal arrangement in which a 501(c)(3) nonprofit sponsors a project that may not have its own tax-exempt status.

**Learning Steward:** A designated person who will ensure your team is intentionally learning and adapting based on new insights. With support from Rotary Charities, they will help identify indicators of systems change that are specific to your context and develop processes to collect and share data and stories about changing patterns. All Systems Change Accelerator applicants are required to designate a Learning Steward in their application.

**Leverage:** In this context, leverage means the other partners, grants or resources you will be able to attract to your work as a result of this grant and how it will change your impact.

**Problems at their roots:** Tackling the dynamics or conditions that created the problem in the first place.

**See the system:** Diverse stakeholders name and visualize the factors that are influencing a problem and explore how they may be interacting to create the problem. Through this, opportunities for "leverage" emerge – places in the system where relatively small structural change can have outsized impact.

## APPENDIX 5: RESOURCES THAT HAVE SHAPED OUR WORK

[ABLE Change Framework, Michigan State University](#)

[Capacity Building 3.0: How to Strengthen the Social Ecosystem, TCC Group](#)

[Emergent Strategy, adrienne maree brown](#)

[Grantmakers for Effective Organizations](#), especially the Systems Grantmaking Community of Practice and the Change Leaders in Philanthropy Fellowship program

[Network Weaver Handbook, June Holley](#)

[Social Innovation Generation \(Sig\), Fostering a Canadian Ecosystem for Social Change](#)

[Social Innovation Exchange & SIX Funders' Node](#)

[Systems Practice Course, +Acumen & The Omidyar Group](#)

[Systems Thinking for Social Change, David Peter Stroh](#)

[The Fifth Discipline Fieldbook, Peter Senge, et al.](#)

[The Practice of Adaptive Leadership, Ronald Heifetz, et al.](#)

[The Water of Systems Change, FSG](#)

[Thinking in Systems, Donella Meadows](#)