**Rotary Charities of Traverse City**

**Systems Change Accelerator Grant Application Questions**

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| **APPLICANT INFORMATION** |
| * Applicant Organization Name * Organization Mailing Address * Federal Employee ID Number (EIN) * Applicant Organization’s Full-Time Employees (FTE’s) or Equivalent * Applicant Organization’s Current Annual Organizational Operating Budget * Year Founded * Web Address * Initiative Contact (will receive all communication regarding the application/project, including the grant agreement – should have signature authority for the applicant organization) * Initiative Contact Name * Initiative Contact Title * Initiative Contact Telephone * Initiative Contact Email * Initiative Contact Organization * Communications Manager * Communications Manager Email * Please provide all applicable social media handles for your initiative and/or all primary partner organizations (Facebook, Instagram, LinkedIn) |

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| **PROPOSED INITIATIVE** |
| Initiative Title |
| Purpose of this funding request.  Example: *The XYZ Initiative requests this grant to contribute to reducing the complex community problem of X by implementing these actions:*   * *Y* * *Z*   Suggested 100 words |
| Counties impacted by initiative (drop-down list) |
| Amount of funding request (limit $150,000) |
| Total initiative cost |
| Initiative funding duration (2– 3 years) |
| This grant category recommends a partnership of at least three different organizations. Please describe your partnership, including:   * Who are your initiative partners who are responsible for carrying out the work of the initiative described in this proposal? * Are the initiative partners members of a larger network or coalition? * What are your biggest accomplishments to date? * Include a description of any past funding that has helped partners get to the point of this application. Funding could be to any one of the partners, the fiscal agent, the partnership, or a related network or coalition.   Suggested 300 words |

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| **Project Detail** | **Review Criteria** |
| Please describe your proposed initiative including:   * What complex problem are you addressing? Limit to one sentence.   Example: *Our initiative seeks to address the problem of youth homelessness by working toward a future where the experience is rare, brief, and non-recurring.* (provided by the Youth Homelessness Initiative funded by Rotary Charities in 2018)   * What is your “constellation of actions” - the various things your initiative will do to change the system? Include the partners responsible for each part and an estimated timeline. * How is this approach different from the status quo approach to the problem?   ***Suggested limit 700 words*** | **Proposed Initiative** |
| Please describe how this initiative is **aligned** with other work in the community aimed at the same problem you are addressing.   * How is this initiative related to other work in the community, including other organizations/entities/initiatives that impact this system?   *Example: Organization X works to advocate for related policy change; organization Y focuses on underserved youth; organization Z trains educators, etc.*   * How will your initiative stay connected with and amplify others in the community doing complementary work?   Suggested 200 words | **Alignment** |

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| **SYSTEM AWARENESS**  The next few questions are designed to help us understand the context around the complex problem you are addressing. | **Review Criteria** |
| Please describe the **complex community problem** this initiative aims to change, including:   * What is the current status of the problem - who or what ***experiences*** the problem, and to what extent? Who or what else is ***affected*** by the problem? * Has the status changed over the last 5-10 years? * Systems naturally uphold the status quo. Oftentimes they won’t change unless they “have to.” Why is this a good time to intervene?   *Has the context changed around your problem providing a window of opportunity? For example, a change in the political climate, a high profile case that has captured public attention and increased public will, a new policy that is about to be enacted that will begin to disrupt the system, a gap or opportunity has become more clear or urgent because of COVID-19, etc.*  Suggested 400 words | **System Awareness** |
| Systems change is different from other types of interventions because it aims to change the **context** that is creating or contributing to a problem.  Please describe how this initiative is based on your **awareness of the system**, or context, around the complex problem you aim to change, including:   * How have you and your partners explored the system, or context, around your complex problem?   *What have you and partners done together to consider the factors that may be contributing most to the problem you are addressing? System factors and patterns include things like mindsets, policies, relationships, power, practices, resources and the interactions between them.*  *Exploring systems factors together may include things like participating in a systems change course together, working through a facilitated systems exploration process, interviewing people across your system, and/or creating visual diagrams or maps that illustrate your understanding of the systemic factors you aim to change.*   * Through your exploration, what factors or patterns did you find are contributing most to the current level of the problem?   *Include at least those factors that you are aiming to change with this initiative. (Please attach a system map or visualization, if available.) Have you considered how you and your partners might be unintentionally contributing to conditions that create the need for your proposed initiative? What have you found?*  Suggested 400 words | **System Awareness** |
| **INITIATIVE DETAIL** |  |
| Please describe how your initiative is **inclusive of those experiencing, or most affected by, the problem**, including:   * To what extent have those experiencing, or most affected by, the problem been included in the exploration of the problem and/or planning and design of the work proposed? What has been the result? * How do you plan to include those experiencing, or most affected by, the problem in the initiative implementation? * If you have not been able to include an important group yet, are there plans to include them in the future?   Suggested 300 words | **Inclusive** |
| Please describe how your initiative will be **collaborative**, including:   * How will the initiative partners and others work collaboratively throughout the grant period? * How will key decisions be made? * If partners are receiving grant funds, how does your initiative describe the role of the fiduciary for this project (the partner receiving and distributing the grant funds)? How will funds be distributed to other project partners? * Please attach an MOU or partnership agreement(s) describing partner roles and commitments.   Suggested 300 words | **Collaborative** |
| Please describe how this project will be **resourceful**, including:   * What funds, expertise and other resources will be leveraged for the project? How will the initiative make the most out of what the community already has? * What resources will likely be needed to continue the initiative after Rotary Charities funding ends, and how they might be acquired?   Suggested 200 words | **Resourceful** |
| Please describe how this initiative will be **reflective**, including:   * What will be different if this initiative is successful?   *Please address at least two levels of impact:*   1. *How will the factors or patterns in the system improve: mindsets, policies, relationships, power, practices, resources and how they are connected?* 2. *How might the changes impact the complex problem in the long-term?*  * What will your initiative’s approach be to learning if the outcomes above are being achieved?   *Who is your team’s designated Learning Steward and why were they selected? Will partners be involved in learning and making use of what you find?*  Suggested 300 words | **Reflective** |
| Please describe how your initiative will be **adaptive**, including:   * What is an example of how you have adapted your work to new information or needs? * What processes, mechanisms and/or culture will help your initiative adapt to changing conditions?   *Open and accessible communication platforms have helped many systems adapt quickly to new information and needs. The Community Health Innovation Region (CHIR) uses an open virtual platform called Basecamp to share information, questions, challenges and ideas among diverse organizations across 21 counties. This has helped them adapt quickly and efficiently during COVID-19*.  Suggested 200 words | **Adaptive** |
| Please list three references who can speak to the need for this initiative and how the proposed work is well-aligned with other work in the larger system.  *References should not be staff or board of the applying entity or initiative partners (those receiving grant funds).*  *If partners are from a larger network or coalition, at least one reference should be from network leadership.* | **Alignment** |

**INITIATIVE BUDGET**

* 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 column 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 initiative. You can calculate the value of volunteer time using the current rate published by [Independent Sector](https://independentsector.org/research/value-of-volunteer-time/).
* If your initiative budget includes contract services, please attach a scope of work or an estimate outlining the work to be completed.
* Definitions:
  + Committed Revenue: Funding that has been awarded or is contractually guaranteed
  + Pending Revenue: Funding for which you have submitted a request but have not yet received a decision.
  + Anticipated Revenue: Funding that you plan to request in the near future but have not yet applied for.

**Year 1 Revenue**

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

**Year 1 Expenses**

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

**Year 2 Revenue**

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

**Year 2 Expenses**

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

Note: If you’re applying for a 3 year grant, a Year 3 Expenses/Revenue table will need to be completed as well.

**REQUIRED ATTACHMENTS**

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 or review is available,** you may attach your most recent tax return or e-postcard.

1. Most recent 990 / Postcard
2. Project/Initiative Budget *(if budget form embedded in application is not used* )
3. Budget Narrative describing the expenses in the project/initiative budget (Optional)
4. 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)
5. Current logo & project photos

**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 (if template embedded in the application is not used)
5. Budget narrative describing the expenses in the project/initiative budget
6. 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).
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.