

The Rotary Foundation's **Future Vision Plan**

A FOUNDATION FOR THE FUTURE



The top section features a blue header with the text 'The Rotary Foundation's Future Vision Plan'. Below this is a large image of a blue sky with white clouds. Centered in the sky is the title 'A FOUNDATION FOR THE FUTURE' in large, bold, gold letters. Below the title are two logos: on the left, a circular logo for 'THE ROTARY FOUNDATION' with a globe in the center; on the right, the 'ROTARY INTERNATIONAL' logo, which is a gear-like wheel with a globe in the center. In the bottom right corner of the sky image is a smaller, gold-colored Rotary logo.

MAKING LIFE A LITTLE BETTER

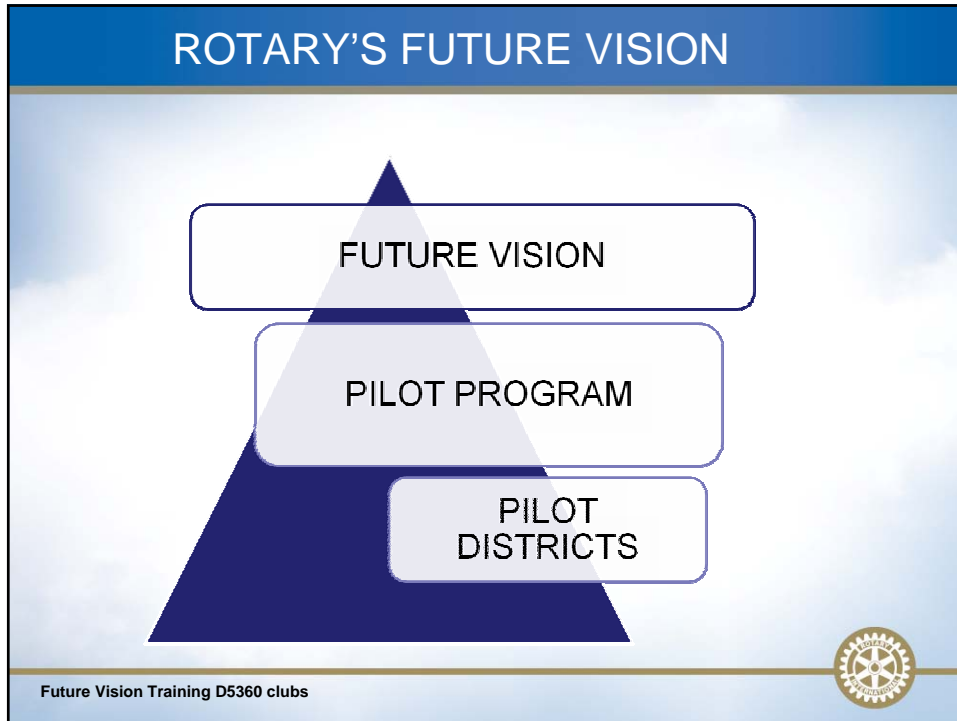



24.04.2008

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The bottom section features a blue header with the text 'MAKING LIFE A LITTLE BETTER'. Below this is a photograph of a group of people, including several children and an older man, clapping together outdoors. The date '24.04.2008' is printed in orange at the bottom right of the photo. In the bottom right corner of the slide is a gold-colored Rotary logo.



- du1
- ## Objectives of Future Vision
- Sharpen focus and increase impact of overall grant activity
- Simplify the Foundation's programs and operations
 - Transfer more decision-making to the local level
 - Increase visibility, image and resources
- Future Vision Training D5360 clubs
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Slide 4

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Purpose

- Understand how to successfully manage a Rotary Foundation grant
- Learn Foundation stewardship expectations
- Prepare clubs to implement the memorandum of understanding
- Qualify clubs to receive Rotary Foundation grant funds

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Why change?

- Preparing for The Rotary Foundation Centennial
- Immense growth
- Relevance in philanthropic world
- Evolving organization
- Rotarian feedback
- Sustainability, significance, simplification

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Where are we coming from

- Current Programs of The Rotary Foundation?
- Current programming ends on July 1, 2010, for Pilot Districts
- Our District 5360 is a Pilot District

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FUTURE VISION PILOT DISTRICT

- What have you heard?
- When do we start?
- Why are we involved as a Pilot?
- How long is the Pilot phase?
- Then what?
- Is there a downside?
- How many Pilot Districts are there?

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Grant Names

Rotary Foundation District Grants

What are these?

What for?

Rotary Foundation Global Grants

What are these? How accessed?

Club collaboration is expected.

Can clubs collaborate effectively?



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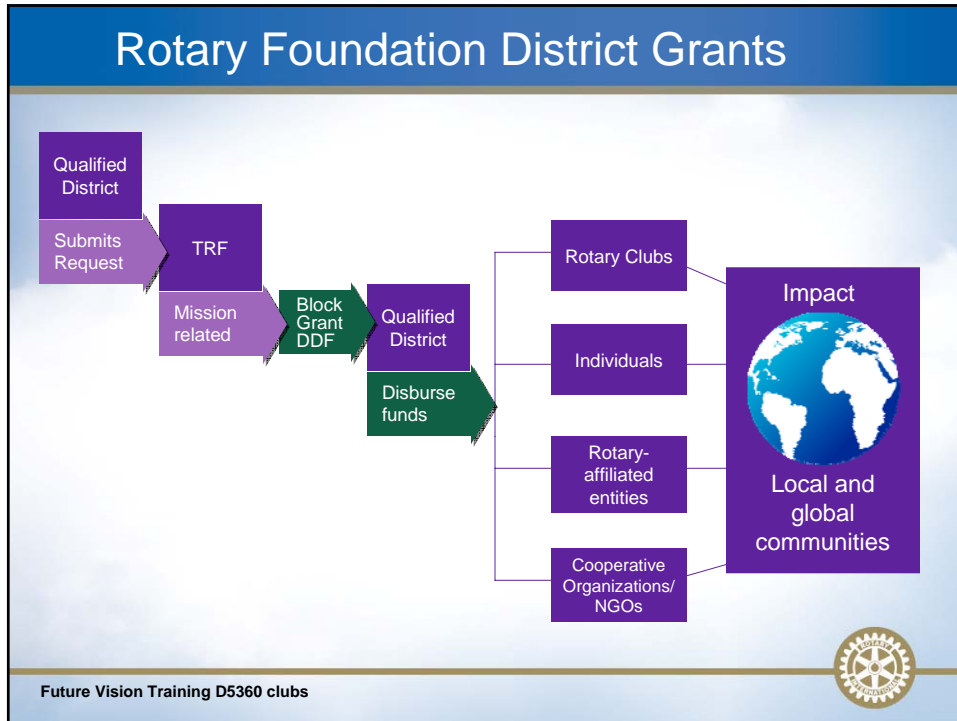
District Grants	Global Grants
Districts apply for a block grant (50% DDF) & can distribute smaller amounts to clubs	Club and/or District apply for minimum World Fund award of \$15,000 for a total project of at least \$30,000.
No World Fund Match	World Fund Match 1:1, for DDF; or 0.5:1 for cash – from the Club and its partners
Fund managed by District.	Int'l and Host Partners required.
No Partners required, can be local or International	Falls in TRF areas of focus – see six areas – later slide
Short, one time, smaller projects	Long-term, sustainable, measurable
bb Active Rotarian Participation.	Active Rotarian Participation

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Rotary Foundation District Grants


- Simple, flexible, innovative
- Educational and humanitarian projects and activities consistent with mission
- Smaller activities and projects
- Local decision making with broader guidelines
- Used for International or Local Community

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How to use District Grants

- **QUESTION:**
 - List ways that District Grants can be used?
 - There may be \$27,000 available for Community and International Projects – do you think there should be limits on what a club can request? Why? How much?
 - Should a club have to put up some funding, and if so, what proportion?

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Funding Attributes

District Grants

- Initiated by districts - district administrators.
- Block grant – sent to District bank account.
- General TRF guidelines apply
- No TRF matching
- Up to 50% DDF - No min. or max. monetary limits on how funds are spent by District.
- Types of projects determined locally.

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Examples of Activity

District Grants — Mission-related

- Exchange of mixed profession vocational training teams with another district (traditional GSE)
- International travel for local doctor to volunteer at a clinic
- Scholarship for student to attend local or international university (traditional scholar)
- Donating art supplies to assist youth after-school program
- Send ShelterBox containers in response to natural disaster in another district

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Project Example – District Grants

- Local town/city wants to build a playground in a needy area; club members to donate physical labour as well as funds

<u>Cost</u>	\$28,000
<u>Revenue</u>	
Rotary Club of Spak	\$7000
Donations	3000
District Funds	4000
Matched by town	14,000
TOTAL	\$28,000

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District Grant Reports

- ***Funding guidelines for Clubs are being developed.***
- ***District reporting requirements also under development.***

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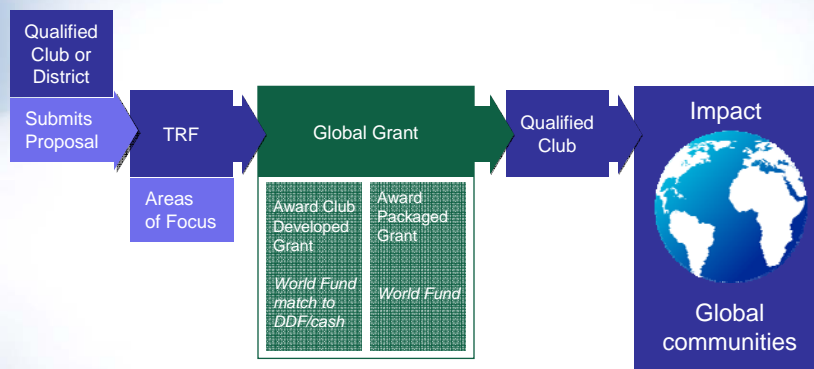
Rotary Foundation Global Grants

EXAMPLES

- Long-term projects
- Rotarian participation
- Larger grant awards
- Sustainable outcomes
- International partnerships required for club- and district-developed grants



Rotary Foundation Global Grants



Global Grants

- Partnerships between District clubs may be needed to seek Global Grants, because of project size.
- Do you think it works well for clubs to work together on projects?

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Rotary's Areas of Focus

- **Basic Education and Literacy**
- **Disease Prevention and Treatment**
- **Economic and Community Development**
- **Maternal and Child Health**
- **Peace and Conflict Prevention/Resolution**
- **Water and Sanitation**



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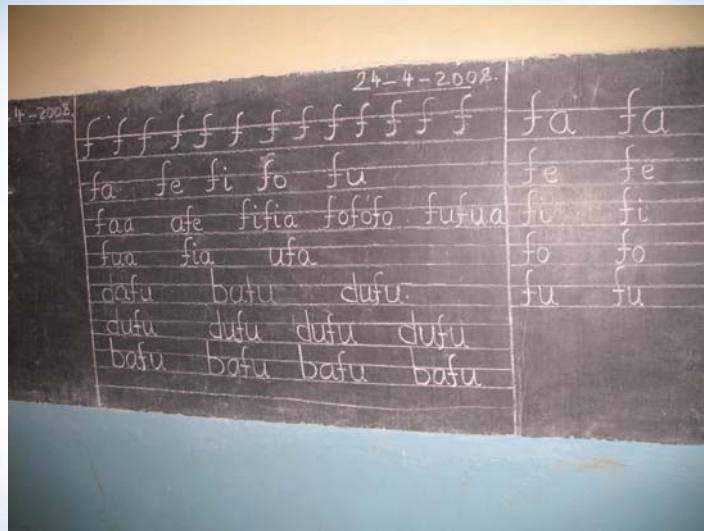
THE STREETS OF THE WORLD



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LITERACY, EDUCATION, MAJOR GOALS



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AIDS VICTIM WITH CHILD



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Learning a vocation Micro-credit group leaders meet



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Widow and children with new Latrine



Future

Water is always needed



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Examples of Activity

Global Grants — Areas of Focus

- International safe drinking water, sanitation, and hygiene education project
- Send scholar abroad to enroll in water engineering degree program
- International malaria project to distribute bed nets and malaria treatments
- Send vocational training team abroad to participate in workshop and learn teaching methods to address adult illiteracy

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Funding Attributes

Global Grants

- Initiated by qualified club and/or district
- Matching grants to clubs only – no district projects.
- Larger awards (min. US\$15,000)
- World Fund match of DDF & Cash
(inc. Club funds)

(full match for DDF; 1/2 match for cash)

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Project Example – Global 1

- Water project – African country X
- Expense Budget \$50,000
- Revenue
 - Rotary Club of Sunshine - \$10,000
 - Rotary Club of Evenshade – 10,000
 - District Designated Funds - 10,000
 - Matching Grant (min \$15k) - \$20,000
 - TOTAL \$50,000
- (½ match club funds and cash; full match DDF)

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Project Example- Global (2)

- Literacy and Education – Central America
- Expense \$40,000
- Revenue
 - Rotary Club of Noontime 10,000
 - AB Community Initiatives Program 10,000
 - District Designated Funds 5,000
 - Matching Grant 15,000
 - TOTAL \$40,000

(CIP funds are cash to the club and qualify for ½ match from TRF.)

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Packaged Global Grants

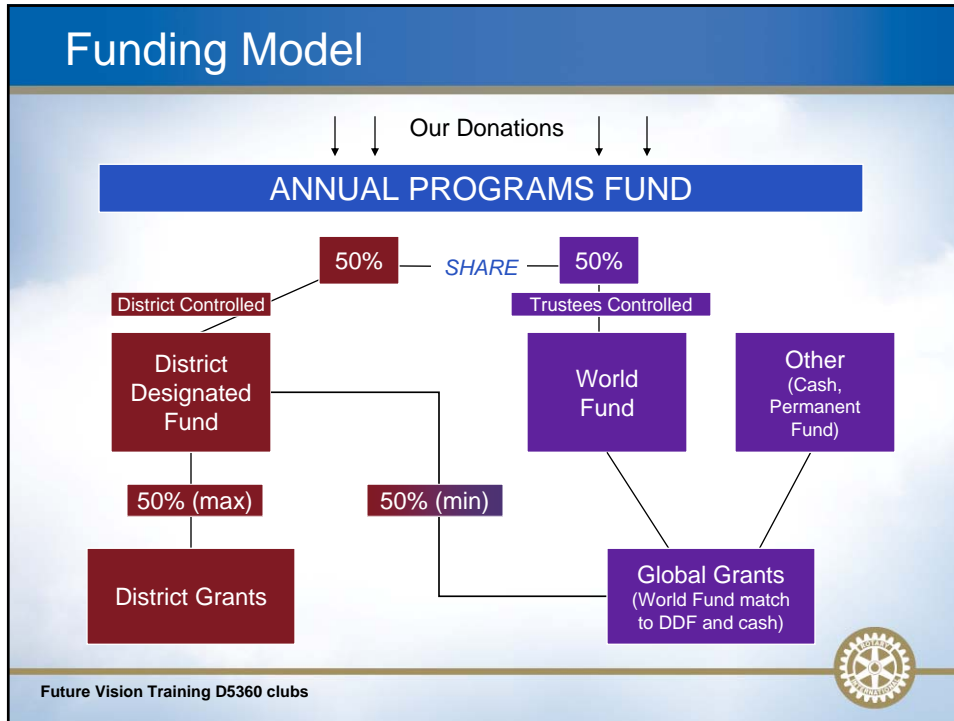
- offer pre-designed projects with technical assistance from strategic partners and TRF



Applying for Global Grants

- Submit grant proposal and application through Member Access
- Must meet goals of area(s) of focus
- Must be sustainable
- Must involve Rotary clubs in two pilot districts
- Minimum project budget of US\$30,000
- District must confirm club is qualified





Current Program Transition

DDF – District approved

Activities currently funded by:

- Grants for University Teachers
- Ambassadorial Scholarships (cultural, multi-year, academic year)
- Additional Group Study Exchanges
- Regional Scholar Seminar Grants
- District Simplified Grants
- DDF for MGs.

Rotary Grants

Activities currently funded by:

- Matching Grants
- 3-H Grants
- Academic-Year Ambassadorial Scholarships
- Group Study Exchange
- Rotary Centers for International Studies
- Volunteer Service Grants

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**Program Transition – new language –
new accountabilities**

District Grants

- Scholarship Grants
- Vocational Study Grants
- Small Grants
- Research & Development Grants
- Disaster Recovery
- Polio-plus

Global Grants

- Scholarship Grants – Grad level
- Vocational Study Grants
- Larger Matching Grants
- Polio-plus

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Slide 37

Assigning District Designated Funds (DDF)
tentative – pending additional information

**Club & personal donations to TRF
Annual Program Fund in 2007** \$ 363,970

		District Grant	Global Grant
District SHARE Allocation 2010 (District Designated Funds)	\$ 181,985	50%	50%
Target split in dollars	→	\$ 90,993	\$ 90,993
Admin fee	\$ 2,700	\$ 2,700	
Humanitarian Aid	\$ 15,000	\$ 15,000	
Research & Development	\$ 15,000	\$ 15,000	
Small Grants	\$ 27,285	\$ 27,285	
Vocational Training Team	\$ 15,000	\$ 15,000	
Scholarship grants	\$ 30,000	\$ 15,000	\$ 15,000
Large Grants	\$ 77,000		\$ 77,000
Polio Plus	\$ -		\$ -
Peace & Reconciliation studies	\$ -		
totals - approx equal to target split	\$ 181,985	\$ 89,985	\$ 92,000

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Slide 38

DISTRICT GRANTS COMMITTEE

REPORTING TO THE DG AND THE DRFC, THE DGC

- **Oversees club qualification**
- **Ensure records are kept**
- **Manage District Designated Funds**
 - Allocations - District vs Global Grants
 - Allocations to various programs
 - Small Grants, Global, Vocational, Scholarship
- **Implements Stewardship practices**
- **Create/enforce District Policies**
- **Resource for Clubs on Foundation grants**
- **Resolve/Report misuse or irregularities**
- **Organize annual GRANTS MANAGEMENT SEMINAR**

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Successful Grant Projects

- Meet real community needs
- Have frequent partner communication
- Have implementation plan with measurable goals and outcomes
- Are sustainable beyond life of the grant
- Practice proper stewardship of grant funds

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PROMOTING FUNDING OF THE ROTARY FOUNDATION

UNDER THE LEADERSHIP OF THE DRFC,

- Funds from **MEMBERS & CLUBS.**
- Promote within Club
- Can be funded through Club events
- Encourage Paul Harris Fellows and Sustaining Paul Harris Fellows
- Overall; \$100 per member per year.

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Qualification

- Clubs and districts must be qualified to receive Rotary Foundation funds **(The MOU)**
- Ensures proper legal, financial, and stewardship controls of grants
- Qualification process is simple
- Goal for every district to become qualified
- Goal for every Club to become qualified.

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MEMORANDUM OF UNDERSTANDING (MOU)

What does that mean at the
District level

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District Implications

- Qualify as a District (sign MOU)
- Train & qualify clubs (MOU)
- Change District committee structures
- Focus on and Partner with Pilot Districts
- Manage relationships-non pilot Districts
– Till 2013

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Opportunities & Challenges

- Provide input into the refinement of new structure
- Receive specialized Foundation support and service
- Access to more funds for use at district's discretion – (50% of DDF)
- Agree to 3-year commitment for the Pilot.
- Must work with other Pilot Districts (unless already in project relationship with Non-Pilot)

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Club level – tasks & changes

Review

Memorandum of Understanding

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The Memorandum of Understanding

Review different assigned sections; report back on the key issues, and any questions or concerns it raises.

- 1. Key points/issues.
- 2. Anything not clear?
- 3. How will this be received by your Club?
- *To sign MOU, club officials need to read and understand the document: Future Vision Plan: Terms and Conditions for Rotary Foundation District Grants and Global Grants.*

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Qualification Requirements

- Attendance at this district Rotary Foundation grant management seminar
- Agreement with the club memorandum of understanding (MOU)
- Submission of a signed club MOU after a full review by Club and Board approving of being involved.

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A KEY MESSAGE

- Clubs qualify annually by signing the club MOU

– This is a Pre-requisite to access
DISTRICT & GLOBAL GRANTS



FINAL REVIEW

- 1. What is Future Vision?
- 2. How long is the Pilot Project of FV?
- 3. What are the two major types of Grants?
- 4. What is the minimum Matching Grant you can seek from TRF for a major project?



FINAL REVIEW - 2

- 5. Can local community projects be funded by District Grants?
- 6. There are 6 “Areas of Focus” for projects in Rotary. What are they?
- 7. When does the Pilot Project for FV start?
- 8. What is the Club Memorandum of Understanding?
- 9. Acronym test – DG, DGE, DGN, DRFC, CIP, RRFC, APF, PF, WF, PHF, DGC.



IMPORTANT ISSUES NOT DISCUSSED TODAY

- Stewardship
- Grant Management
- Budgeting
- Financial Management
- Conflict of Interest
- Audits
- Proper Use of Grants
- Choosing a Project
- Needs Assessment
- Proposal Preparation
- Application Preparation
- Partner Communication
- Concept of Sustainability
- Applying for District Grants



Key dates – Preparing for FV

- FEB. 6 – INFORMATION SESSION – MEDICINE HAT
- FEB. 20 – INFORMATION SESSION – RED DEER
- FEB. 27 – INFORMATION SESSION – CALGARY
- MAR. 6 – INFORMATION SESSION - LETHBRIDGE

- MAR. 26/27 - AG & PETS TRAINING
- APR. 1 – QUALIFIED CLUBS CAN START APPLYING
- **May 8 – DISTRICT GRANTS MANAGEMENT SEMINAR**
- JUL. 1 – APPLICATIONS CONSIDERED, FUNDS AVAILABLE.

Future Vision qualification seminars in red

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FINAL QUESTIONS FOR DISCUSSION AND REVIEW

*What is on your mind: don't quite understand;
bothers you; wish you could ask/tell TRF; or
District Grants Committee.*

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TRF FV Resources

- Rotary.org/future vision/e-learning
- Rotary.org go to member access

- District 5360 Web page
 - Educational section
 - Links
 - Reporting

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GRANT MANAGEMENT SEMINAR

- ATCO CENTRE, CANADA OLYMPIC PARK, CALGARY
- MAY 8, 2010 – 8:30 AM – 4:30 PM
- COST: \$50

 A Future Vision Qualification Seminar

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Grant Management

- Administered with proper financial control
- Adhere to superior technical standards
- Guided by humanitarian and educational principles
- Meet the needs of the beneficiaries
- Fulfill their objectives
- Safeguard donors' funds

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Stewardship

- Stewardship is the responsible management and oversight of grant funds, including:
 - Rotarian supervision of project
 - Following standard business practices
 - Reporting of irregularities to TRF
 - Implementing projects as approved
 - Financial records review
 - Timely submission of reports

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Terms of Qualification

- Qualification is valid for one Rotary year
- The club as an entity is responsible for the use of funds
- Disclose potential conflicts of interest
- Cooperate with all audits
- Proper use of grant funds



Learning Objectives

- Identify best practices for choosing a project.
- Develop a plan to implement your project.
- Understand what is needed to establish a financial management plan.



Successful Grant Projects

- Meet real community needs
- Have frequent partner communication
- Have implementation plan with measurable goals and outcomes
- Are sustainable projects that continue after grant funds have been expended
- Practice proper stewardship of grant funds

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Needs Assessment

- Talk with members of the community
- Assess your club's resources and availability and its potential partners to meet the need
- Choose a project that is based on the community's need

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Partners

- Search for Rotarians who have identified a need in their local communities
- Host partners should be invested in the project
- Good communication between the host and international partners is key



Project Planning

- Form a three-person grant committee
- Assign roles
- Set measurable and sustainable goals
- Create a budget
- Create an implementation plan
- Have a contingency plan



Creating a Budget

- Realistic
- Competitive bidding
- Reasonable prices
- Disclose potential or real conflicts of interest



Learning Objectives

- Identify best practices for choosing a project.
- Develop a plan to implement your project.
- Understand what is needed to establish a financial management plan.



Learning Objectives

- Write a successful grant proposal and application.
- Understand good stewardship practices for fundraising.



Applying for District Grants

- Block grant given to district, which then determines the amount to be given to clubs
- Relates to TRF mission
- Local or international projects/activities



Rotary Foundation Mission

- To enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty

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Principles of Sustainability

- Project impact after funding is expended
- Economic, cultural, social & resource
- Optimal use of local resources
- Respect natural resources
- Reach the most beneficiaries
- New methods in professional fields
- Prepare professionals to increase impact
- Use input and skills of grassroots groups

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Global Grant Financing

- Rotarian cash contributions
- District Designated Fund
- Rotary Foundation World Fund award
- Non-Rotarian cash contributions (not sent to or matched by the Foundation)



Financing Guidelines

- Cash contributions must come from or be raised by Rotarians
- Funds cannot be raised from beneficiaries in exchange for receiving the grant
- Funds cannot come from other grants
- Contributions should be credited to donor



Learning Objectives

- Write a successful grant proposal and application.
- Understand good stewardship practices for fundraising.



Evaluation

- Ongoing during project implementation and after completion
- Based on goals set for the project
- Assists with reporting requirements
- Use findings to improve future projects and identify successes you can promote



Global Grant Reports: Frequency

- Progress reports received within 12 months of first payment
- Progress reports required every 12 months through the life of the grant
- Final reports due within 2 months of completion



Global Grant Reports: Content

- How both partners were involved
- Type of activity: humanitarian project, scholar, vocational training team
- Evaluation of project goals and how funds met the goals of the area(s) of focus
- How funds were spent
- Number of beneficiaries and how they benefited

