

District 7850

Future Vision Overview

January 26, 2013

Dartmouth-Hitchcock Medical Center

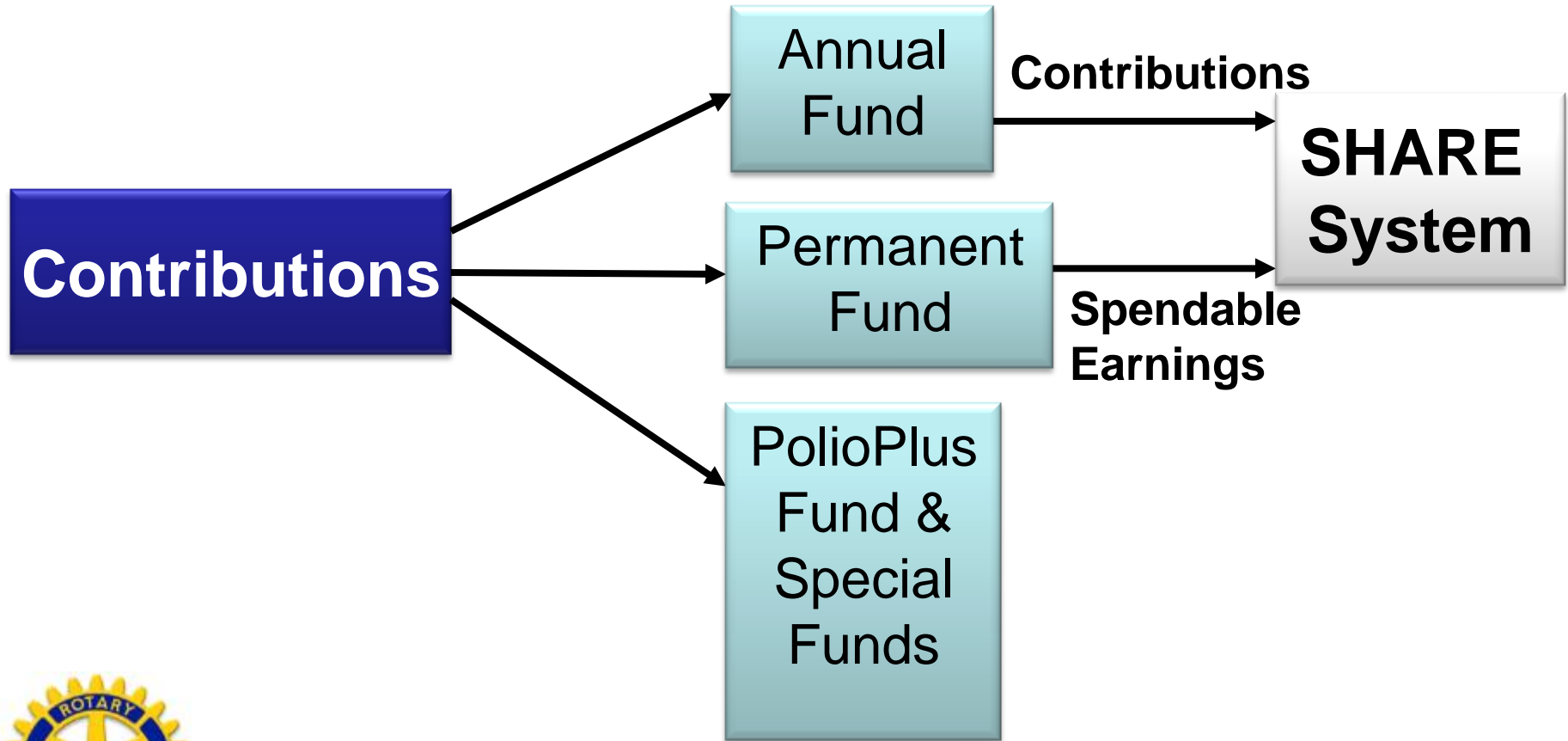


Foundation Motto

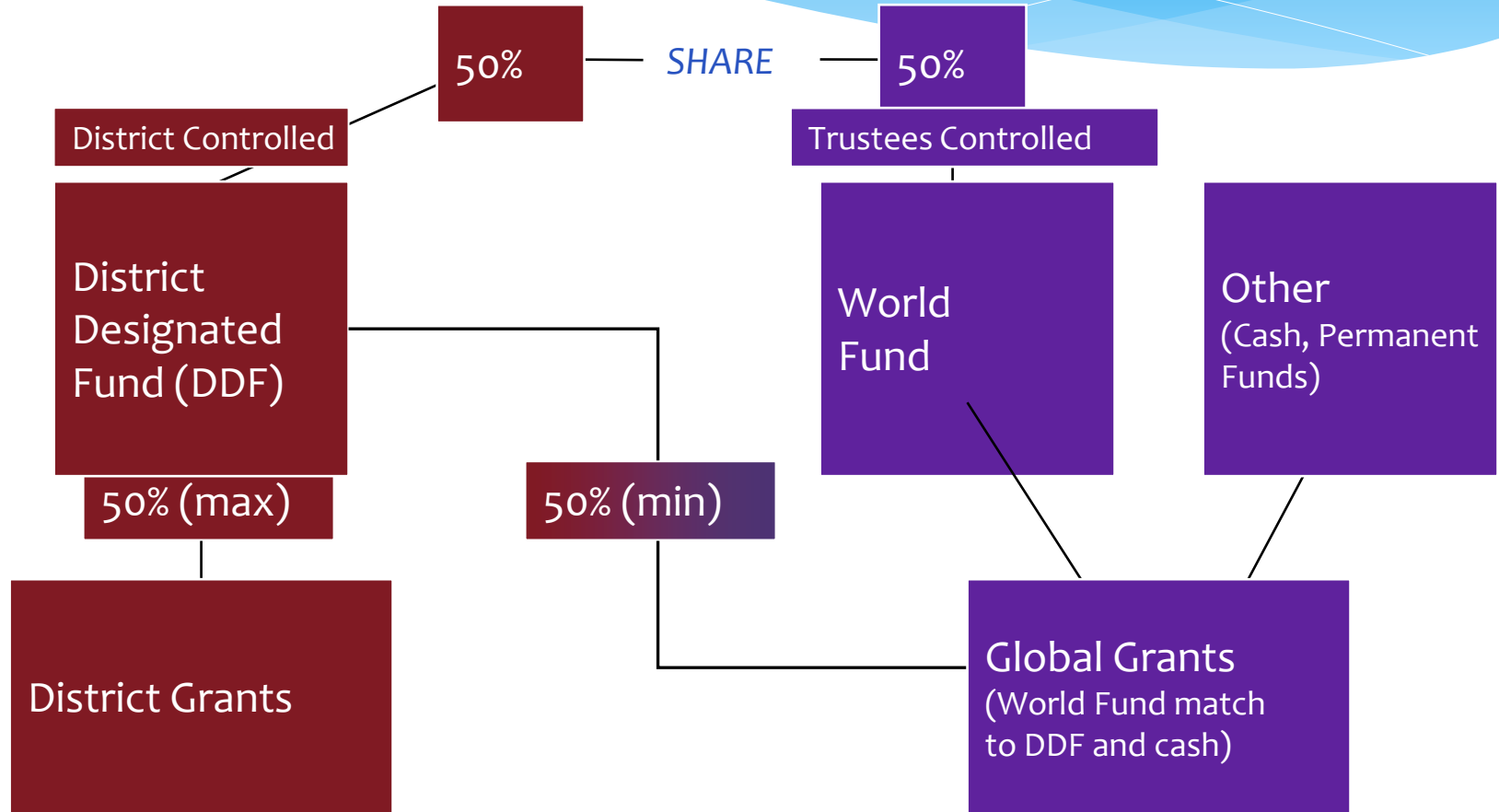
“Doing Good in the World”



Funding Model



Funding Model



Annual Programs Fund

Two Buckets of Money

District Designated Funds

(Share Funds)

- Money designated for use by the Rotary District's Rotarians.



World Fund

- Money designated for use by the Rotary Foundation Trustees.
- The Foundation uses the World Fund to pay for worldwide programs available to all Rotary Districts, regardless of their specific contributions.



We have a rich history of using Foundation money!

Global Funds 2012/2013

- Ambassadorial Scholar
- Group study exchanges
- Matching Grants
 - Guyana – (Literacy and Maternal child Health)
 - South Africa (Literacy)
 - Ghana and Sudan (Water and Sanitation)
 - Turkey (in the works) – Maternal Child Health)
 - Columbia (Literacy)

District Grants 2012/2013

- Barre & St. Johnsbury – Literacy (dictionaries)
- Colchester- Milton – Literacy and Conflict resolution (My Wet Shoes)
- Lebanon – Community Development (city park beautification)
- Lebanon-Riverside – Water and Sanitation (latrines in El Salvador)
- North Conway – Disaster Relief (mobile home clean-up)
- St-Hyacinthe – Maternal/Child Health (autism project)
- Randolph – Disease Prevention and Treatment (defibrillator for Technical Center)

Our Donations to the Foundation

In District 7850 our annual contributions currently average approximately \$70/member, or just under \$120,000 per year. Thus our District has about \$60,000 to be use for Foundation programs.

If we could increase this to \$100/member, we then would raise just over \$160,000 and have over \$80,000 to used for Foundation programs that interest us.

Funding Model 2012/13 compared to the new funding model

- **This year US\$60,000 came back in District Designated Funds**
 - **US\$10,000 available for District Grants for Clubs**
 - **US 50,000 available for:**
 - **Ambassadorial Scholar (US \$32,000)**
 - **Matching Grants (US \$18,000 + carryover funds)**

Funding Model 2012/13 compared to the new funding model

- This year US\$60,000 came back in District Designated Funds
 - US\$10,000 available for District Grants for Clubs
 - US 50,000 available for:
 - Ambassadorial Scholar (US \$32,000)
 - Matching Grants (US \$18,000 + carryover funds)

- In 2013/2014 we will again receive approximately US\$60,000
 - US\$30,000 will be available for District Grants for Clubs
 - US\$30,000 + carryover funds for Global Grants.



WHAT is Future Vision?

The Future Vision Plan is
The Rotary Foundation's new
model to support district
and club humanitarian and
educational projects.

Future Vision Quick Reference Guide

Future Vision

A New Vocabulary

- **Six Areas of Focus**
- **Global Grants**
- **District Grants for Clubs**
- **District Designated Funds allocations to Global and District**
- **Needs Assessment**
- **Sustainability**
- **Measureable**
- **Vocational Training Teams**
- **Scholarships as Grants**
- **Member Access as gateway for learning and global applications**



Future Vision Plan Goals

- Simplify programs and processes
- Focus Rotarian service efforts to increase global impact
- Support global and local efforts
- Increase sense of ownership at the district and club levels
- Enhance Rotary's public image



**Can you name the Rotary
Foundation's 6 Areas of Focus?**



Six Areas of Focus



Water and Sanitation



Disease Prevention and Treatment



Maternal and Child Health



Basic Education and Literacy



Economic and Community Development



Peace and Conflict Prevention/Resolution



Sustainability

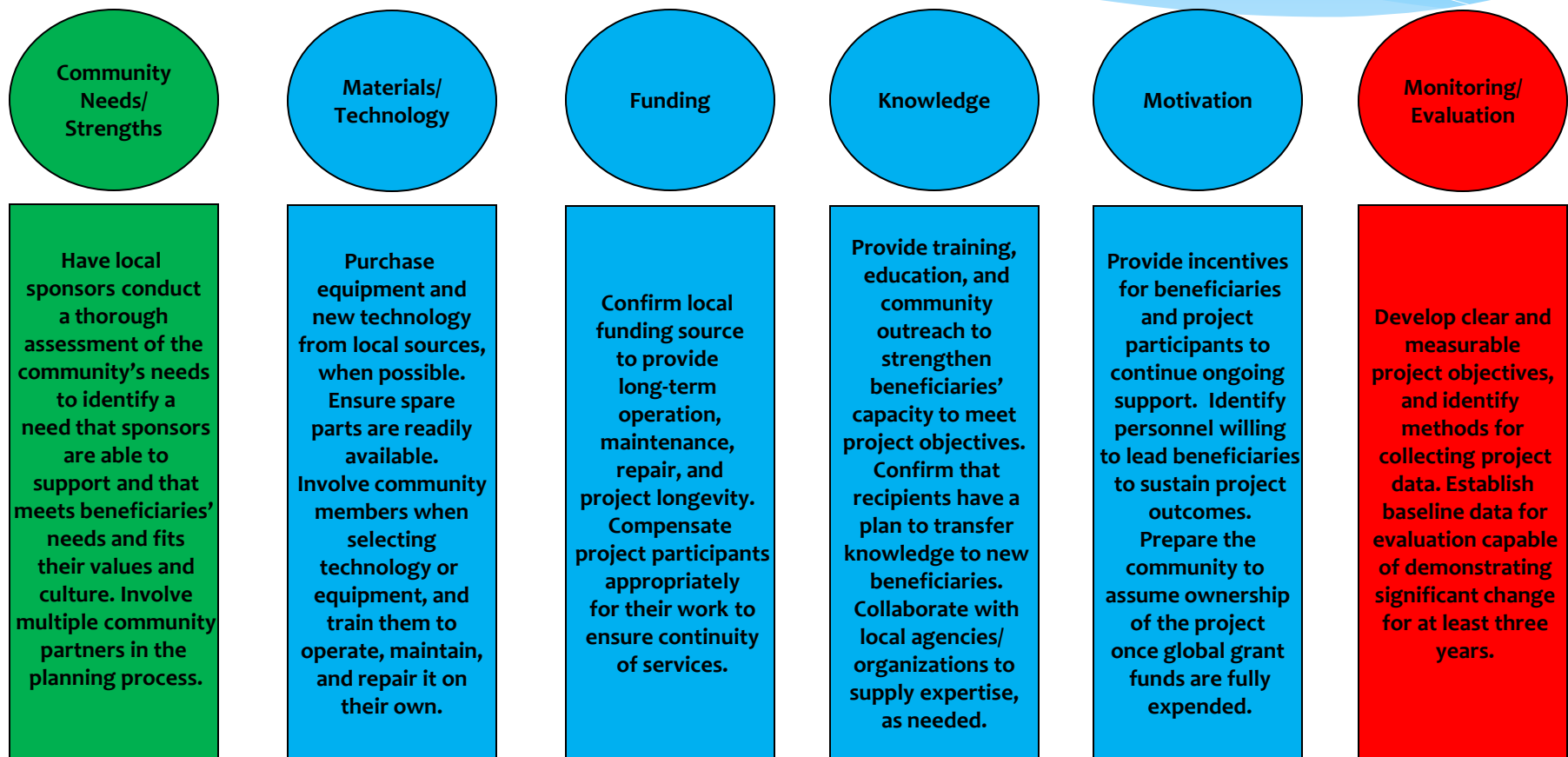


Sustainable Projects

- **Provide a Good Community fit**
- **Supply the Materials/Technology for the “long haul”.**
- **Funding is adequate to complete the project**
- **Knowledge is transferred**
- **Recipients and Rotarians (especially local Rotarians) are motivated**
- **Evaluation is ongoing**

* Developing Sustainable Projects

- * Sustainability means different things to different organizations. For The Rotary Foundation, sustainability means providing long-term solutions to community needs that the benefiting community can maintain after grant funding ends. Global grant projects must be sustainable and display the following characteristics:



Planning

Implementation

Reporting



Measurable Outcomes

Putting a measurement plan in place before implementation

- Establish baseline data
- Determine quantitative and qualitative measures
- Establish a timetable for data collection

New Grants

- **Global grants**
- **Packaged grants**
- **District grants**



Current Grant Model funds:

- **Grants for University Teachers**
- **Ambassadorial Scholarships (cultural, multi-year, academic year)**
- **Group Study Exchange**
- **Regional Scholar Seminar Grants**
- **District Simplified Grants**
- **Smaller Matching Grants**
- **Volunteer Service Grants**
- **Disaster Recovery**

New Global Grants Model will fund:

- **Academic Scholarships**
- **Vocational Training Teams**
- **Global Grants**



Global Grants

- Long-term projects
- Larger grant award (US\$30,000 minimum budget)
- Require community and Rotarian involvement
- Strengthen knowledge, skills and resources for a community or communities.
- Sustainable, measurable outcomes
- Alignment with areas of focus
- Receive a World Fund match

Food for thought...



Consider ways you might want to partner with other clubs in our District to do a larger grant, or let us know if you have a Rotarian colleague in another District that need financial support for a larger project.



The Rotary Foundation believes that partnerships will help us make sustainable changes in the world... Rather than “spending money” we will be “investing our money”.

Global Grants Scholars

- Post-graduate work
- Can be for more than one year
- Global Grant application – must be greater than \$30,000
- Six Areas of Focus
- Must show how education will further mission of TRF
- Award decision by TRF
- Logistics up to Club/District



Global Grants

Vocational Training Teams

- Have a mission, often skill or knowledge transfer
- Can have more than one Rotarian
- Trip can be as many days as are needed. No minimum.
- More than one trip allowed
- Must address one or more of Six Areas of Focus
- Must show sustainability
- Logistics up to Club/District



Global Grants

Global Grants can be a combination of all three elements if desired, e.g. “matching grant” +/- vocational training team +/- scholarship




Global Grant First Steps

- The first phase of the application gives a Club an opportunity to confirm that their activity meets global grant requirements.
- If you decide you want to consider applying for a grant...Please discuss your activity and funding options with Marilyn Bedell, your District Foundation Chair before you begin a global grant application.



Member Access

 ROTARY INTERNATIONAL®
THE ROTARY FOUNDATION®


Member Access

Sign in to Member Access

Login e-mail: [Forgot login e-mail?](#)

Password: [Forgot password?](#)

☐ Remember me [What is this?](#)

[Sign in](#) 

[Having trouble?](#)

Don't have a Member Access account?

[Create Account](#)

[Contact us](#)

Announcements

Emails from "giftacknowledgement@rotary.org" are safe to open

The Foundation sends these emails to acknowledge gifts received from [www.rotary.org](#) or at the Foundation's Chicago bank. [More information](#) is available on Rotary's website.

All Rotarians can update their information in Member Access

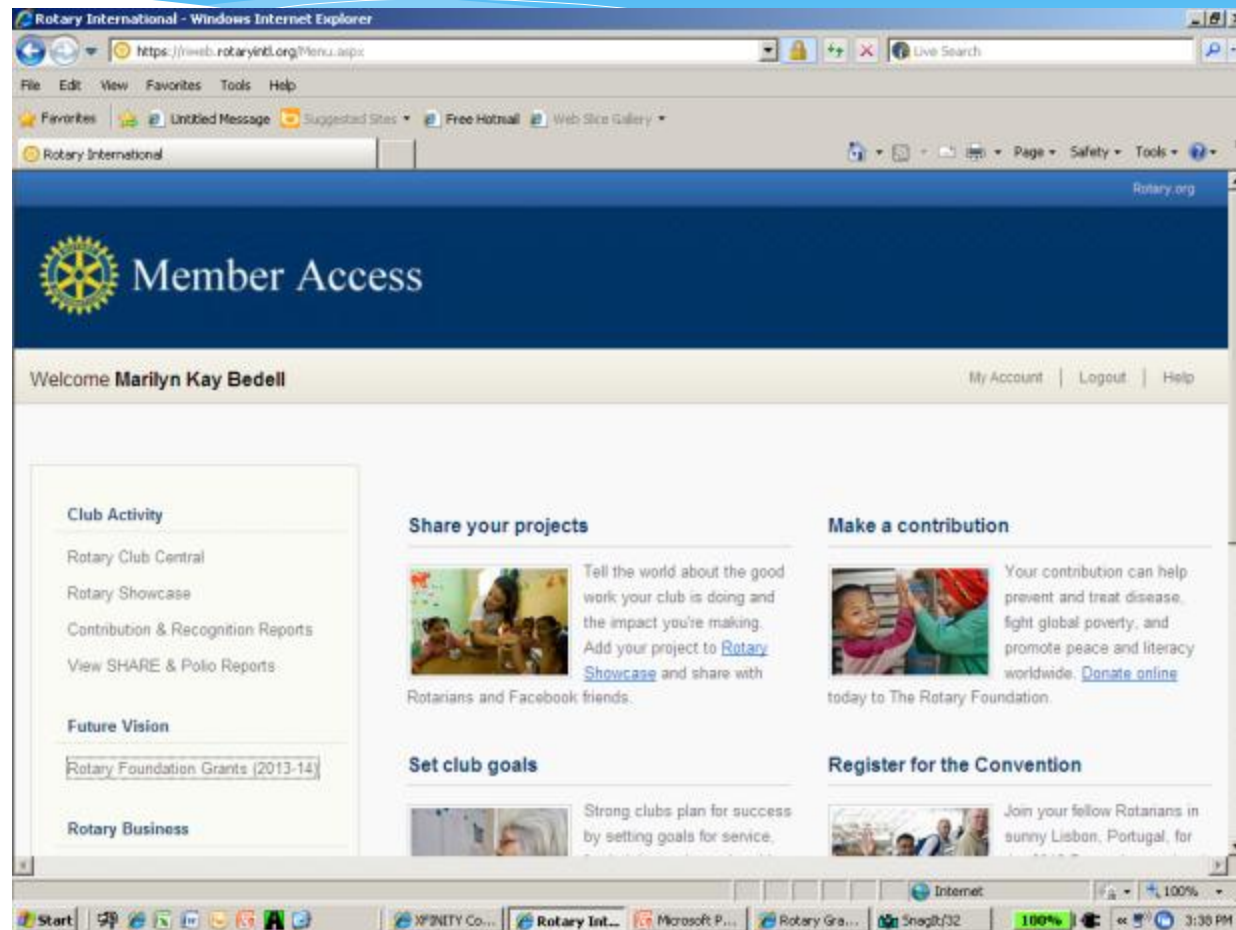
Rotarians can change their contact information in the My Account section. In My Account, Rotarians can also change their password, as well as their newsletter subscription and credit card preferences.

Experience Rotary's new online contribution system

Make a one-time or recurring gift in 12 currencies while preserving existing tax benefits where available. Sign in and click "Contribute to The Rotary Foundation" to make your gift today.

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Member Access



Member Access



Member Access

Rotary Grants - Windows Internet Explorer

http://www.rotary.org/en/grants


File Edit View Favorites Tools Help

Favorites Untitled Message Suggested Sites Free Hotmail Web Slice Gallery

Rotary Grants

Page Safety Tools

FEATURED GRANT



Members of a vocational training team shared their expertise in nursing education with faculty at Aga Khan University's School of Nursing and Midwifery recently. [More »](#)

GRANTS ANNOUNCEMENTS

31 Oct. 2012
[Online district grant applications now available](#)

18 Oct. 2012
[Rotary Scholars begin studies at UNESCO-IHE](#)

16 Jul. 2012
[Packaged grant funds microcredit project in Philippines](#)

[More announcements »](#)

Tell us your role and your goal. We'll get you there.

I am a...
I want to...

Quick Links

- [Grant Management Manual \(PDF\)](#)
- [Grant Management Leaders' Guide \(ZIP\)](#)
- [Preparing Your Club for Rotary Foundation Grants in 2013 \(PDF\)](#)
- [Learning Center](#)

GRANTS BASICS

Explore Grants	Manage Grants
District Grants	Qualification
Global Grants	Travel Arrangements
Packaged Grants	Reports

LEARNING & REFERENCE

Learn by Subject	Learn by Role	Policies & Procedures	Give
Grant Types	District Officer		Contact Us
Grant Process	Club Officer		My profile
Activity Types			Rotary.org

31

Internet 100%

Start XFINITY Co... Microsoft P... Manage Gra... Rotary Gr... Snagit/32 100% 3:45 PM

Member Access

The screenshot shows a Windows Internet Explorer browser window displaying the Rotary Grants website. The address bar shows the URL <http://www.rotary.org/en/grants/grants-basics/manage-grants>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The Favorites bar shows links to Favorites, Untitled Message, Suggested Sites, Free Hotmail, and Web Slice Gallery. The website header features the Rotary logo, the text "Rotary Grants", and navigation links for "Give", "Rotary.org", "Language", and a user profile "Marilyn". Below the header, there are tabs for "Grants Basics" and "Learning & Reference". The main content area is titled "Manage Grants" and includes a "Start your grant" button. The text describes the new grant application and lists four main sections: District qualification, District grants, and two others. The right sidebar contains a "Share" section with links to Facebook, Twitter, LinkedIn, Email, Print, and ShareThis. Below this is a section titled "Tell us your role and your goal. We'll get you there." with two dropdown menus labeled "I am a..." and "I want to...". At the bottom of the sidebar is a "Related Webinars" section for "20 Feb. 2012". The Windows taskbar at the bottom shows the Start button, several application icons, and the system clock displaying 3:47 PM on 2/20/2012.

Manage Grants | Rotary Grants - Windows Internet Explorer

http://www.rotary.org/en/grants/grants-basics/manage-grants

File Edit View Favorites Tools Help

Favorites Untitled Message Suggested Sites Free Hotmail Web Slice Gallery

Manage Grants | Rotary Grants

Give | Rotary.org | Language | Marilyn

Rotary Grants

Grants Basics Learning & Reference

Rotary Grants > Grants Basics > Manage Grants

Manage Grants

Start your grant

With the new grant application, you can complete your Rotary grants business online and easily collaborate with grant partners.

The app has four main sections:

District qualification

This section includes an interactive memorandum of understanding (MOU) that details many aspects of the grants program. To qualify, district officers need to read through the MOU and answer a few comprehension questions on each section.

District officers only need to complete district qualification once during their term, but you can return to review the document and the additional content provided as often as you like.

District grants

Share

- Facebook
- Twitter
- LinkedIn
- Email
- Print
- ShareThis

Tell us your role and your goal. We'll get you there.

I am a...

I want to...

Related Webinars
20 Feb. 2012

Done

Start XFINITY... Microsof... 32 Manage ... Manag... Snagit/32 XnView -... 100% 3:47 PM

Packaged Grants

- **Strategic Partners**
- **Planned by Rotarians**
- **Encourage involvement by smaller clubs**
- **No cost to clubs/Funded with World Funds**



Strategic Partners



District Grants for Clubs

- A District Grant is a tool Rotary Districts utilize to support short-term, humanitarian projects that benefit the community. District Grants are funded with District Designated Funds from The Rotary Foundation.



District Grants for Clubs

- A district may apply annually for a single grant for one or more projects that utilizes a maximum of 50% of its District Designated Funds.



District Grants for Clubs

- Districts may support a broad range of activities with their district grant funds.
- Examples of potential district-grant activities include:
 - Local or international service projects as well as service travel or disaster recovery efforts.
 - Scholarships
 - Vocational training teams



District Grants for Clubs

“The Foundation itself requires very minimal reporting, thanks to the advance planning done by clubs and districts before the funds are requested. This should enable districts to close out their grants quickly.”



Preparation Steps - Club

- ✓ **Learn about the Club Memorandum of Understanding (see handout)**
 - **Terms of qualifications**
 - **Club leadership responsibilities**
 - **Financial management/stewardship**
 - **Document retention (reports and receipts)**
 - **Signature of president and president-elect**
 - **Submitted annually**



Preparation Steps - Club

- ✓ Understand requirements for clubs to qualify for grants
 - Signed Club Memorandum of Understanding
 - Grant Management Seminar attendance
 - Follow District requirements
- ✓ Understand project development process to meet grant application calendar



Stewardship

Stewardship is the responsible management and oversight of grant funds, which ensures that funds are used properly and benefit populations in need.



Stewardship Practices

- Have Rotarians supervise project
- Implement projects as approved
- Follow standard business practice
- Report irregularities
- Submit reports
- Retain documents



Qualification

- ✓ Qualification provides clubs with financial and stewardship controls for meeting Foundation requirements and managing grant-funded activities.
- ✓ Clubs need to qualify before applying for district, global and packaged grants.
- ✓ Qualification Process Completed by 1 May 2013



Qualification Requirements

- ✓ At least one member of your club must attend our grant management seminar at the District Assembly on 27 April 2013
- ✓ Read, sign, and submit Club Memorandum of Understanding at the District Assembly
- ✓ Submit proposals for District Grants for Clubs by 27 April 2013 to Larry Vars and Marilyn Bedell prior to, or at the District Assembly.
- ✓ Follow the steps in the District Grants for Clubs process for 2013-14
- ✓ Identify a Club Steward to monitor the implementation of grants, and collect documentation to meet auditing requirements



Club Memorandum of Understanding

- ✓ **The Club Memorandum of Understanding is a binding agreement between the club and its district, outlining Foundation requirements.**
- ✓ **By signing the Club Memorandum of Understanding, the club agrees to comply with the requirements.**



Club Memorandum of Understanding (MOU) includes information about:

- 1. Steps in the Club Qualification process**
- 2. Club Officer Responsibilities**
- 3. Financial Management Plan**
- 4. Bank Account Requirements for Global Grants**
- 5. Reporting on Use of Grant Funds**
- 6. Document Retention**
- 7. Reporting Misuse of Grant Funds**
- 8. Who can sign the MOU**

How will the Rotary Foundation know if new plan is successful?

- ✓ Do Rotarians apply for funds?**
- ✓ Do we increase donations to the Rotary Foundation?**
- ✓ Do we increase number of beneficiaries?**
- ✓ Are more people aware of Rotary efforts?**
- ✓ Are more Rotarians involved in Foundation Activities?**

2011-12 Future Vision Grants

District grants	Global grants	Packaged grants
Applications Received	Applications Received	Applications Received
95	279	23
Applications Approved	Applications Approved	Applications Approved
94	233	13
DDF Approved	Total Funding Approved	World Fund Approved
US\$5,375,578	\$12,243,847*	\$1,034,185

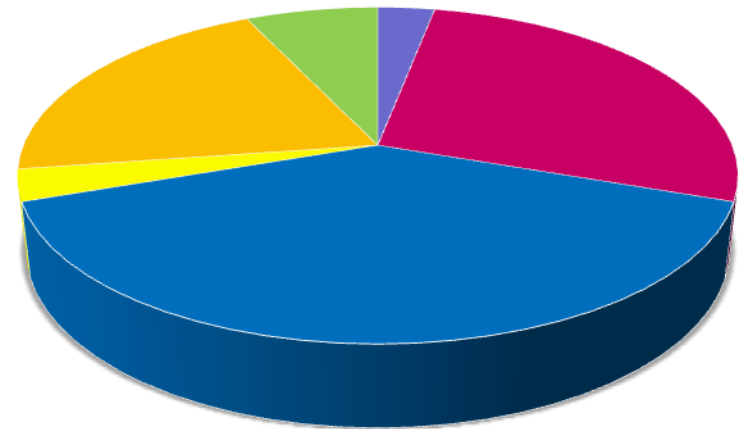
* Does not include funds sent directly to project accounts

2011-2012 Pilot Statistics

District Grants

District grants	
Number of approved grants	
	94
Average grant award	
	US\$57,187
Average # of projects	
	21
Average project amount	
	\$2,696
Total awards	
	US\$5,375,578

% of projects



- Administration 3%
- Community Development 27%
- Education 39%
- Food/Agriculture 3%
- Health 20%
- Water 7%

2011-2012 Pilot Statistics

District Grants

Global grants

Number of approved grants

233

Average grant award

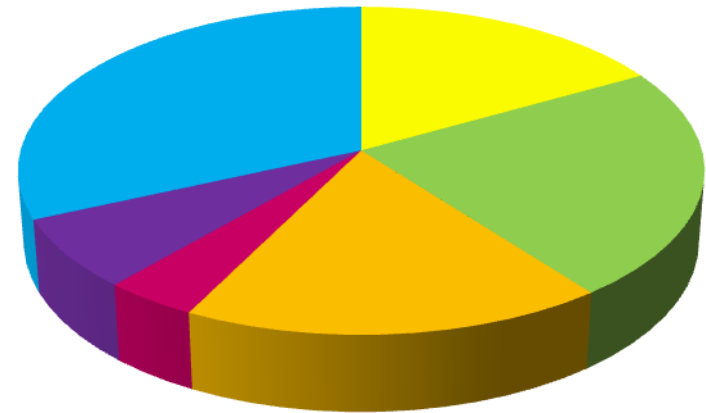
US\$52,549

Total funding approved

\$12,243,847*

*Does not include funds sent directly to project accounts

% of global grants approved

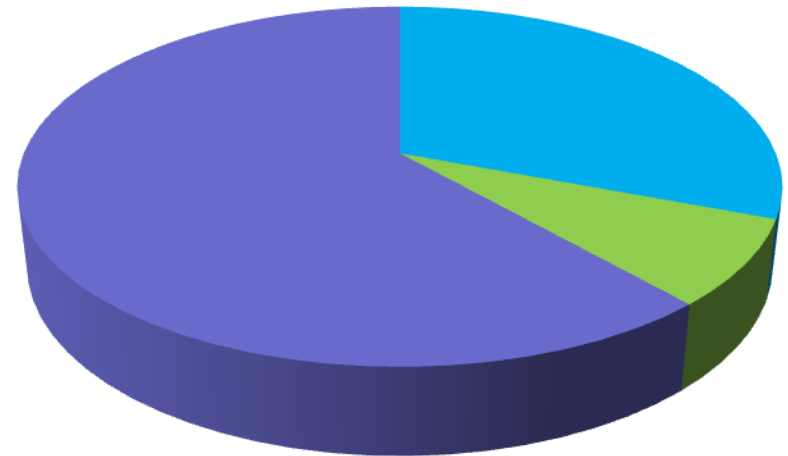


- Supporting Education 17%
- Fighting Disease 23%
- Growing Local Economies 18%
- Saving Mothers and Children 4%
- Promoting Peace 7%
- Providing Clean Water 32%

2011-12 Statistics: Packaged Grants

Packaged grants	
Number of approved grants	
13	
Average grant award	
US\$79,552.69	
Total awards	
\$1,034,185	

of applications approved



■ Aga Khan University - 4

■ Oikocredit - 1

■ UNESCO-IHE - 8

What Did Rotary Foundation Learn?

1. Enhanced Online System
2. Adjusted District Leadership Structure
3. Contingency Fund for District Grants
4. Expanded Criteria for Areas of Focus
5. Clarified Guidelines for Areas of Focus and Sustainability

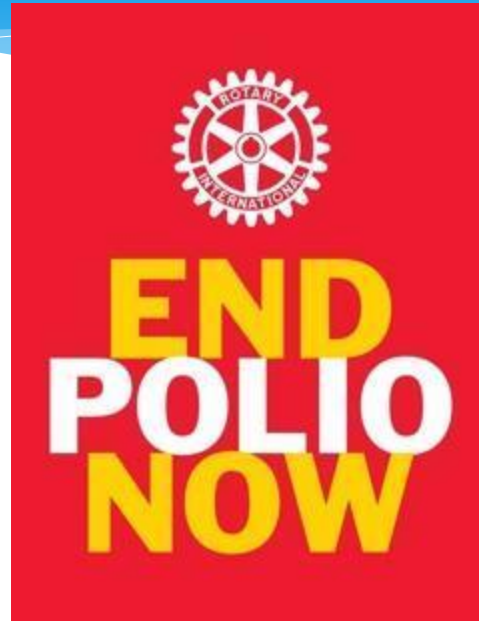
What Did The Rotary Foundation Learn?

- 6. Streamlined Global Grant Application Process**
- 7. Simplification of Global Grant Scholarships**
- 8. Less Restrictions for Vocational Training Teams**
- 9. International Travel in Global Grants**
- 10. Reduction in Packaged Grant Minimum**

Resources

- **Rotary International**
 - <http://www.rotary.org/en/members/runningaclub/fv/pages/ridefault.aspx>
 - contact.center@rotary.org
- **District website**
 - <http://www.rotary7850.org>
 - **Marilyn Bedell, District Foundation Chair and Larry Vars, District Grant Chair**





HOMEWORK

DUE APRIL 27, 2013 AT THE DISTRICT ASSEMBLY

- ✓ **Make sure someone comes to Grant Seminar in April to be qualified.**
- ✓ **Memorandum of Understanding(s) [The Rotary Foundation's Global Grants and The Rotary Foundation's District Grants for Clubs] – signed**
- ✓ **DISTRICT GRANT FOR CLUBS PROPOSALS – Critical for planning 2013-2014**

Questions?

Our Rotary Foundation Doing Good in the World



NEPETS Rewards Program

Donate to

The Rotary Foundation

- Opportunity to win an iPad and other great awards
- **Donations from Dec 15, 2012 to Mar 8, 2013 are eligible**

- Donate to TRF

Online (bring receipt)

For 2 tickets/\$10 donated

OR

At PETS

For 1 ticket/\$10 donated

- All donations credited to you, your club, and your district

Table next to Registration

**Let's beat last year's total of
\$65,000!**

