

# ***District Rotary Foundation Seminar Manual***

## **Planning and Organization Chapter**



The 2012 edition of the *District Rotary Foundation Seminar Manual* is intended for use by the district training committee and the district Rotary Foundation committee conducting training in the 2012-13 Rotary year. The information in this publication is based on the Rotary Code of Policies and The Rotary Foundation Code of Policies. Please refer to these documents for exact RI and Foundation policy. Changes to these documents by the Council on Legislation, the RI Board of Directors, or The Rotary Foundation Trustees override policy as stated in this publication.

This chapter outlines the purpose of the seminar, district roles and responsibilities, a suggested agenda, and available resources. The folders in the zip file contain session outlines with speaking points and PowerPoint presentations for the following seminar topics:

- Alumni
- Areas of Focus
- Foundation Funding
- Fundraising and Recognition
- Humanitarian Grants
- PolioPlus
- District Grants
- Global Grants
- Rotary Peace Centers
- Scholarships
- Stewardship and Qualification
- Strategic Partners and Packaged Grants
- Transitioning to New Rotary Foundation Grants
- Vocational Training Teams

Districts can choose which of these topics to use in their seminar. This manual provides the tools needed to create a seminar that is relevant to the participants from your clubs. The session outlines are presented as Word documents to enable you to tailor the speaking points to fit your audience.

### **Comments?**

If you have questions or comments about this manual, please contact:

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## **Purpose**

The district Rotary Foundation seminar emphasizes the benefits of involvement in The Rotary Foundation and outlines the Foundation's programs and policies. Attendees get answers to their Foundation questions and updates on policy changes and goals for the year. The seminar also offers an opportunity to recognize individuals and clubs for outstanding Foundation contributions.

Seminar goals should include:

- Increasing financial support for Rotary Foundation activities
- Encouraging the establishment of club Rotary Foundation committees
- Equipping club leaders with the tools and training to motivate the members to support The Rotary Foundation
- Gathering feedback from clubs on districtwide activities

## **Participants**

Although the district's entire membership should be encouraged to attend, your target audience should include club presidents, club presidents-elect, club Rotary Foundation chairs and committee members, new district leaders, and new members.

## **Recommended Time Frame**

The district Rotary Foundation seminar should be held between July and November. This timing enables participants to act on what they've learned and helps you achieve your district's goals before the end of the Rotary year.

## **Recommended Topics**

A needs assessment will help you determine the content for your seminar. Listen to what your fellow Rotarians have to say and use their input to create an agenda that addresses their interests and concerns while also conveying information that your assessment has identified as essential.

The following topics are for all districts:

- PolioPlus
- Rotary Peace Centers
- Fundraising and Recognition
- Stewardship
- Alumni Relations

For nonpilot districts in 2012-13:

- Humanitarian Grants
- Transitioning to the Future Vision Plan

For Future Vision pilot districts in 2012-13 and all districts training for global launch of the new Rotary Foundation grants in 2013-14:

- Areas of Focus
- Foundation Funding
- Strategic Partners and Packaged Grants

- District Grants
- Global Grants
- Scholarships
- Vocational Training Teams

To learn more about grant management and qualification, club members should attend a district grant management seminar, which requires at least five hours. Consider making it a component of the district Rotary Foundation seminar.

## ***Roles***

The district governor is the convener for this meeting. The district Rotary Foundation committee should work to develop training content with the district training committee, which also can assist with the planning, promotion, logistics, and preparation for training leaders. Consider asking a regional Rotary Foundation coordinator to serve as an adviser, counselor, or keynote speaker.

## ***Budget***

Work within a seminar budget that is based on estimated attendance, with a sufficient reserve to allow for the unexpected. Note that The Rotary Foundation does not reimburse districts for this seminar.

## ***Agenda***

This agenda is based on a one-day training meeting for all club members. Consider conducting separate sessions for club Rotary Foundation committee chairs or offering concurrent sessions on different Foundation topics.

Speaking points and slides for the recommended topics are provided in a zip file on [www.rotary.org](http://www.rotary.org).

Start	Finish	Duration	District Rotary Foundation Seminar	
		30 min.	Registration	
		60 min.	Opening Plenary Session <ul style="list-style-type: none"><li>• Announcements</li><li>• District Foundation accomplishments</li><li>• General Rotary Foundation update</li><li>• Goals for the year</li></ul>	
		15 min.	Break	
Concurrent Group Discussion Sessions				
		60 min.	Session 1a: Topic	Session 1b: Topic
		10 min.	Transit to next session	
Concurrent Group Discussion Sessions				

		60 min.	Session 2a: Topic	Session 2b: Topic
		60 min.	Lunch Presentation of recognition to Rotary Foundation donors	
Concurrent Group Discussion Sessions				
		60 min.	Session 3a: Topic	Session 3b: Topic
		10 min.	Transit to Closing Plenary Session	
		30 min.	Closing Plenary Session <ul style="list-style-type: none"> <li>• Call to action</li> <li>• Thanks for participation</li> <li>• Evaluation</li> </ul>	

## Resources

Trainers should have a general knowledge of Rotary Foundation resources to prepare for their sessions. Provide the list below to each trainer.

### Rotary.org

The RI website, [www.rotary.org](http://www.rotary.org), offers a wealth of Rotary information and services. Browse pages about the history, philosophy, programs, and administration of The Rotary Foundation, and access the latest Rotary materials, from multimedia to books and brochures:

- **The Rotary Foundation** — An overview of Foundation programs, the Future Vision Plan, and contribution information
- **Future Vision** — An online reference for the most up-to-date information, in Future Vision publications and other resources
- **Training** — Information that can help you plan your district Rotary Foundation seminar and learn how to train, including:
  - Planning a training meeting
  - Training Rotarians
  - Train the Trainer
  - Conducting webinars
  - Club trainers
  - [Rotary Training Talk](#) newsletter
  - Training best practices database
- [learn.rotary.org](http://learn.rotary.org) — Area of the site that allows club-level Rotarians to learn about Rotary on their own with online courses. (Consider asking participants to view a course before attending the district Rotary Foundation seminar.)
- **Rotary Images** — Searchable library of photographs from around the world that Rotarians may download free and use on websites and in presentations and publications

## Human Resources

- Regional Rotary Foundation coordinators (RRFCs) and assistant RRFCs
- Rotary Foundation alumni coordinators (RFACs)
- End Polio Now coordinators
- Rotary Foundation staff at RI World Headquarters and your international office

## General Resources

- *Official Directory* (007) — Contact information for RI and Foundation officers, committees, resource groups, and Secretariat staff; worldwide listing of districts and governors; alphabetical listing of clubs within districts, including contact information. Issued annually and available through Member Access at [www.rotary.org](http://www.rotary.org).
- *Manual of Procedure* (035) — RI and Foundation policies and procedures, including RI constitutional documents established by legislative action, the RI Board of Directors, and The Rotary Foundation Board of Trustees. Issued every three years, after each Council on Legislation.
- [\*RI Catalog\*](#) (019) — List of RI multimedia materials, publications, and supplies. Revised annually (online catalog at [shop.rotary.org](http://shop.rotary.org) is updated regularly).

## Service Project Design

- *Communities in Action Kit* (605) — A two-part kit, with [\*Communities in Action: A Guide to Effective Projects\*](#) offering step-by-step instructions for developing, carrying out, and evaluating a service project, including how to conduct a community needs assessment and work with other organizations, and [\*Community Assessment Tools\*](#) providing eight tools for identifying effective service projects

## The Rotary Foundation

- [\*Future Vision News\*](#) — Monthly e-newsletter highlighting new information, common questions, and updates
- *The Guide to Matching Grants* (144)
- *Rotary Peace Centers Program Guide for Rotarians* (085)
- [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#)
- [Terms and Conditions of District Simplified Grants](#)

## Public Relations

- *Effective Public Relations: A Guide for Rotary Clubs* (257) — Basic tips and tools to help Rotarians promote club activities
- *Media Crisis Handbook* (515) — Helps Rotary clubs and districts deal effectively and efficiently with the news media when unexpected events prompt inquiries

## District Resources

RI materials are designed to meet the needs of Rotarians worldwide. Supplement them with materials and lists specific to your district or region, including:

- District leaders

- District directory
- District website
- Examples of successful projects and activities
- Rotary Foundation success stories
- Planning calendar with dates of important district events

## **Publications for Participants**

The following general Foundation publications are recommended for use at your district Rotary Foundation seminar. Most of them are free. Consider displaying materials at an information table. A general rule is to order one publication for every four participants.

Items with a catalog number can be ordered online ([shop.rotary.org](http://shop.rotary.org)) or via email ([shop.rotary@rotary.org](mailto:shop.rotary@rotary.org)), from Publications Order Services at RI World Headquarters (phone: +1-847-866-4600; fax: +1-847-866-3276), or from the RI international office serving your area. Allow at least six weeks for processing and delivery. Many publications can be downloaded from the RI website.

<b>General Information</b>			
219	The Rotary Foundation Quick Reference Guide	159	Rotary Foundation Facts
		208	Rotary Foundation Goals
187	Rotary International and The Rotary Foundation Annual Report		
<b>Rotary Foundation Programs</b>			
Web	PolioPlus Headliner Kit	084	Rotary Peace Fellowships Leaflet
<b>New Rotary Foundation Grants</b>			
003	Future Vision Quick Reference Guide		
<b>Fund Development</b>			

097	Invitation to the Bequest Society	957	Every Rotarian, Every Year Brochure
098	Bequest Society Membership Card	978	Every Rotarian, Every Year DVD
123	TRF Global Contribution Form	956	Every Rotarian, Every Year Rotary Foundation Sustaining Member Badge Stickers
149	Benefactor Commitment Card		
173	Ways to Give		
183	Securing the Future	959	Every Rotarian, Every Year Posters (set of two)
109	Life Income Gifts (U.S. only)		
175	Publicly Traded Securities (U.S. and Canada only)		
382	Donor Advised Fund Brochure (U.S. only)		

## ***Planning Calendar***

A planning calendar is available at [www.rotary.org](http://www.rotary.org) (keyword search “planning calendar”). It outlines procedures for planning a training meeting and includes a timeline for actions leading up to the meeting. The calendar also provides space for listing the person responsible for each action step and for the target completion date.

## ***Session Outlines***

Session outlines for the recommended topics are provided as Word documents to enable you to customize your district Rotary Foundation seminar. It’s unlikely that you’ll be able to cover all topics, so choose those most relevant to Rotarians in your district or consider combining some. Once you’ve determined the topics you’ll cover, find the session outline and PowerPoint presentation in the zip file at [www.rotary.org](http://www.rotary.org) (keyword search “Foundation seminar manual”). Session outlines for facilitated group discussions include:

- Learning objectives
- Online resources for further information
- Suggestions for district-specific information (these may require additional preparation)
- Speaking points supporting each slide in the PowerPoint presentation
- Discussion questions
- Suggested activities

## ***Opening Plenary Session***

The opening plenary session sets the tone for the meeting. It should inform, motivate, and inspire participants.

### ***Speaking points***

- Explain how this seminar will prepare club members to participate in The Rotary Foundation.
- Review seminar agenda, including time for breaks and meals.

- Explain logistics for breakout sessions.
- Discuss the district's Rotary Foundation accomplishments over the past year.
- Provide an overview of PolioPlus, Rotary Peace Centers, and district fundraising goals, highlighting changes in Foundation activities and goals for the coming year.
- Provide an overview of the Foundation's new grants starting in July 2013.
- Motivate participants to learn about the new grant model.

## **Closing Plenary Session**

The closing plenary session should wrap up the learning and discussions in which attendees have participated. It's a final opportunity for the district team to summarize important points and take care of district business. This session should bring the meeting to an inspirational finish.

### **Speaking points**

- Highlight significant areas of discussion and key points.
- Thank and acknowledge attendees for their participation.
- Invite participants to pose questions to the district leadership team.
- Encourage participants to take action on at least one thing they've learned at the seminar.
- Address the importance of evaluation for improving future training seminars.



# ***District Rotary Foundation Seminar Manual***

## **Session Outline: PolioPlus**



### ***Learning objectives***

By the end of this session, participants should be able to

- Explain Rotary's efforts and progress toward eradicating polio
- Identify club events to educate the community and raise funds for PolioPlus
- Understand the importance of the global certification of polio eradication

### ***Online resources***

PolioPlus information and related resources are available at [www.rotary.org](http://www.rotary.org) (keyword search "polio").

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Include a slide with pictures of PolioPlus activities that clubs in your district participated in.
- Mention how much money clubs in your district contributed to PolioPlus last year.
- If your district is in a country that either is polio-endemic or has imported cases of polio, include an update on cases.

### ***Speaking points***

Polio eradication is Rotary's top priority. For the most up-to-date presentation and speaking points, contact PolioPlus program staff at +1-847-866-3305 or [polioplus@rotary.org](mailto:polioplus@rotary.org).

### ***Discussion questions***

- If your club is in a polio-free country, what types of PolioPlus activities can it organize?
- What is an effective club fundraiser in support of PolioPlus?
- How do we get the general public interested in finishing the job of polio eradication?

### ***Suggested activities***

- Ask participants, working in small groups, to list successful polio fundraisers and to brainstorm five new community fundraising ideas.
- Ask participants to create a one-minute speech about Rotary's work toward polio eradication that they can use in casual conversation to educate non-Rotarians.

- Have participants work in small groups to brainstorm how to localize a “This Close” public service announcement.

# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Rotary Peace Centers**



### ***Learning objectives***

By the end of this session, participants should

- Be able to explain the Rotary Peace Centers program
- Know the selection criteria for Rotary Peace Fellows
- Understand how to support Rotary Peace Centers

### ***Online resources***

The program overview, application, alumni stories, and related resources are available at [www.rotary.org](http://www.rotary.org) (keyword search “Rotary Peace Centers”).

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Invite a Rotary Peace Centers alum to be a keynote speaker.
- Include the number of Rotary Peace Fellows your district sponsored last year.
- If your district is located near a Rotary Peace Center, feature fellows who are currently studying there.
- Insert contact information for your district’s Rotary Peace Fellowships subcommittee chair or the grant subcommittee chair.

### ***Speaking points***

- The Rotary Centers for International Studies in peace and conflict resolution program is Rotary’s major educational priority for achieving the Foundation’s mission of world understanding and peace. Up to 110 Rotary Peace Fellows are selected annually for graduate programs in international relations, peace studies, conflict resolution, and related subjects, or for a three-month professional certificate program.
- The purpose of the Rotary Peace Centers program is to
  - Provide advanced international educational opportunities in peace and conflict resolution for a group of individuals chosen from various countries and cultures, and to advance knowledge and world understanding among potential future leaders of government, business, education, media, and other professions
  - Support and advance research, teaching, publication, and practical field experience in issues of peace, goodwill, conflict, and world understanding
  - Support interaction with academics to inspire people to work for a culture of

- peace and tolerance while enhancing their capacity, knowledge, and skill
  - Provide a means for The Rotary Foundation and Rotarians to increase their effectiveness in promoting tolerance and cooperation among peoples, leading to world understanding and peace
  - Rotary Peace Centers are hosted by these partner universities:
    - International Christian University, Tokyo, Japan
    - University of Queensland, Brisbane, Australia
    - University of Bradford, West Yorkshire, England
    - Duke University and University of North Carolina at Chapel Hill, USA
    - Uppsala Universitet, Uppsala, Sweden
    - Chulalongkorn University, Bangkok, Thailand
  - The selection criteria for Rotary Peace Fellows are:
    - Demonstrated leadership skills and community service activities or academic or professional achievements
    - A commitment to peace and international understanding
    - Clear career goals related to peace and conflict resolution
- Additional requirements for the master's degree program:
- An undergraduate degree in an appropriate field and a strong academic record
  - Proficiency in more than one language (even if the candidate proposes to study in a country where his or her native language is spoken)
  - A minimum of three years' combined paid or unpaid full-time work experience in a relevant field
- Additional requirement for the certificate program:
- A minimum of five years' relevant work experience
- Rotarians can support Rotary Peace Centers by
    - Seeking out and endorsing qualified candidates to compete for a fellowship. All districts are invited to nominate a candidate each year. The deadline to submit applications to The Rotary Foundation is 1 July.
    - Identifying Major Donors in your region to endow an annual fellowship with a gift of US\$25,000 or more
    - Asking Rotary Peace Centers alumni to speak at a club meeting and involving them in club activities
  - Questions about Rotary Peace Centers? Email [rotarypeacecenters@rotary.org](mailto:rotarypeacecenters@rotary.org).

## ***Discussion questions***

- How can the Rotary Peace Centers program be promoted to the community to enhance Rotary's public image?
- How can Rotary Peace Centers be promoted in order to attract the best candidates?
- What are some ways to get Rotary Peace Fellowships alumni involved in your clubs?

### ***Suggested activities***

- Ask participants to consider how they would describe the benefits of this program to a club member, potential candidate, or potential Major Donor. Descriptions should be no more than 50 words.
- Have participants work in small groups to create a plan for attracting applicants for Rotary Peace Fellowships.
- Ask participants, working in small groups, to brainstorm ways to identify Major Donors interested in Rotary Peace Centers.

# ***District Rotary Foundation Seminar Manual***

## **Session Outline: District Grants**



*This presentation is for Future Vision pilot districts in 2012-13 and for all districts training for global launch in 2012-13 and 2013-14.*

### ***Learning objectives***

By the end of this session, participants should be able to

- Explain district grant eligibility
- Apply to their district for funding from the district grant
- Understand the types of activities funded with district grants

### ***Online resources***

District grant information, including articles, publications, and related resources, is available at [www.rotary.org](http://www.rotary.org) (keyword search “district grants”). Self-directed learning opportunities are available at [learn.rotary.org](http://learn.rotary.org).

### ***District-specific information***

Consider customizing this presentation for your district in these ways:

- Provide information on the district’s process for soliciting project ideas from clubs.
- Provide sample district grants proposed in your district or ask a pilot district to provide samples.
- Give an update on the status of club projects funded by the district grant.
- Use photographs of district activities funded by your district grant.

### ***Speaking points***

- District grants are single, annual block grants made to districts for up to 50 percent of their District Designated Fund (DDF). The district grant can fund multiple club and district projects, which may be local or international. District grants offer local decision making, with minimal restrictions, for smaller-scale activities and projects.
- Activities funded with district grants must include active Rotarian participation, adhere to stewardship guidelines, demonstrate cultural sensitivity, and be consistent with the mission of The Rotary Foundation, but need not be related to an area of focus. For complete guidelines, see [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#).
- The mission of The Rotary Foundation is to enable Rotarians to advance world

understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

- <<Insert the district's process for administering district grants, including:
  - Accepting project ideas from clubs for funding to allow the district to plan how to allocate the District Designated Fund
  - Deadlines for receiving project proposals
  - Awarding district grant funds to clubs
  - Gathering information from clubs to complete the report for the Foundation>>
- Examples of district grant activities (in U.S. dollars):
  - \$750 to support an after-school program for at-risk youth
  - \$9,000 to bring medical professionals from Argentina to the U.S. for training
  - \$4,250 to install water chlorination systems
  - \$3,200 to provide equipment for a school kitchen
  - \$50,000 to sponsor two international scholars
- Additional examples of district grant activities:
  - \$4,500 to send a team of professionals on a cultural exchange
  - \$2,000 to provide short-term scholarships to children to further their studies
  - \$50,000 to sponsor two international scholars selected by the district (similar to Ambassadorial Scholars)
  - \$17,600 to support a reforestation project that will create income opportunities for families in need
- Questions about district grants? Contact your district leadership or << insert contact information for your district's grants coordinator at the Foundation>>.

## **Discussion questions**

- How can you get your whole club involved in a project that uses district grant funding?
- What projects or activities are possible when using The Rotary Foundation mission as a guide?
- What will your club need to do differently to plan for district grants before receiving funds?

## **Suggested activities**

- Have small groups of participants list at least five ideas for district grant activities.
- Provide a sample list of projects, and ask participants to determine whether each project is eligible for either a global grant or a district grant.
- If your district received more proposals for district grant funding than it can support, ask participants to review the proposals and the amounts requested, and determine which

should be funded and why.



# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Rotary Foundation Global Grants**



*This presentation is for Future Vision pilot districts in 2012-13 and for all districts training for global launch in 2012-13 and 2013-14.*

### ***Learning objectives***

By the end of this session, participants should be able to

- Design global grants
- Define the types of activities funded with global grants
- Understand how to partner with clubs both within and beyond their district on global grants
- Apply for global grants

### ***Online resources***

Future Vision information such as articles, publications, and related resources is available at [www.rotary.org](http://www.rotary.org) (keyword search “global grants”). Self-directed learning opportunities are available at [learn.rotary.org](http://learn.rotary.org).

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Outline district support available and the process for clubs to request global grant funding from the District Designated Fund (DDF).
- List any district-developed global grants that need participation by Rotarians in the district.
- Present an update on the status of global grants in the district.
- Use photos of district activities that align with one of the six areas of focus.
- List club partnerships.

### ***Speaking points***

- Global grants fund large-scale projects and activities that
  - Align with an area of focus
  - Respond to a need the benefiting community has identified
  - Include the active participation of the benefiting community
  - Strengthen local knowledge, skills, and resources
  - Are designed to enable the benefiting community to address its own needs after

the Rotary club or district has concluded its work

- Have measurable results
- Have active Rotarian participation
- The minimum grant award is US\$15,000 (for a total budget of at least \$30,000). The DDF allocation is matched 100 percent, and cash is matched at 50 percent from World Fund. Global grants are sponsored by a host club in the project country and another club outside the project country.
- Global grants must support at least one of the six areas of focus, which reflect critical humanitarian issues and needs that Rotarians are addressing worldwide:
  - Peace and conflict prevention/resolution
  - Disease prevention and treatment
  - Water and sanitation
  - Maternal and child health
  - Basic education and literacy
  - Economic and community development
- Global grant funding is an investment in long-lasting change. Sustainable projects can take many forms but all display the following characteristics:
  - **Community fit:** Sustainable projects are well planned, involve the collaboration of multiple project participants, and complement the needs and values of beneficiaries.
  - **Materials/technology:** Sustainable projects employ durable materials that are accessible, ready to use, and environmentally sound.
  - **Funding:** Sustainable projects ensure that a reliable source of funding exists to continue project outcomes after the grant is complete.
  - **Knowledge:** Sustainable projects increase capacity by helping communities acquire new skills, knowledge, and behaviors.
  - **Motivation:** Sustainable projects provide tangible incentives for community ownership of project activities and outcomes.
  - **Evaluation:** Sustainable projects are designed to ensure clear and measurable outcomes.

Global grants should incorporate practices from each of the characteristics above. If not provided with grant funds, sponsors should demonstrate how these sustainability practices are being met through existing community services.
- When designing your project, create a plan to measure outcomes. Your plan should incorporate baseline data, a timeline, and methods for measuring your achievements. For example, if a city has an infant mortality rate of 15 percent, your goal might be to reduce the rate to less than 10 percent in four years, and you would measure your project's success by reviewing the city's public health statistics.
- Rotarians can submit global grant applications, review grant status, and submit reports online through Member Access.
- The global grant application process works this way:
  1. A club is qualified by its district (qualification is covered in the stewardship

session).

2. A club member submits the two step application online through Member Access.
  3. When the application is complete, the district Rotary Foundation committee chair authorizes it.
  4. The Foundation reviews the application for final approval.
- Project sponsors are responsible for submitting grant progress reports within 12 months and every 12 months thereafter until the project is complete. Final reports need to be submitted within two months of the close of the grant. Unused funds will be returned to the Foundation and credited to the World Fund. New grant applications cannot be accepted if either grant sponsor has overdue reports.
  - <<Insert the district's process for approving DDF for global grants, deadlines, and determining which grants receive DDF.>>
  - Example global grants and the areas of focus they support:
    - Humanitarian project and vocational training team (disease prevention and treatment):** A vocational training team from the United States travels to Uganda to provide pediatric heart surgeries and to train local health professionals.
    - Scholarship (peace and conflict prevention/resolution):** A student from New Zealand pursues a master's degree in international law, with a specialty in peace, justice, and development, at Leiden University Law School in the Netherlands.
    - Humanitarian project (maternal and child health):** Equipment and materials are provided to supply a pediatric center in Togo and to establish a training program in public health and nutrition there.
    - Humanitarian project and vocational training team (water and sanitation; disease prevention and treatment):** Access to a clean, reliable water supply is constructed for three Mayan villages in Guatemala. Latrines are built and vegetable gardens established. A vocational training team from Canada educates villagers about disease transmission and risks, improved waste-disposal practices, sustainable planting and gardening methods, and nutrition.
  - Questions about global grants? Contact <<insert contact information for your district's global grants coordinator at the Foundation>>.

## **Discussion questions**

- What does your club need from the district to support its efforts to obtain global grants?
- How can your club partner with other clubs on large projects?
- Which area of focus is of most interest to your club? What kind of project would you consider working on with host partners?

## **Suggested activities**

- Have small groups of participants list at least one global grant idea for each area of focus.
- Provide a sample list of projects and ask participants to determine whether each is

eligible for either a global grant or a district grant.

- Have participants review a district-developed global grant application and determine how their club can participate. Begin to plan how to implement the grant.

# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Strategic Partners and Packaged Grants**



*Only pilot districts can apply for packaged grants in 2012-13. All districts will be able to apply for packaged grants in 2013-14.*

### ***Learning objectives***

By the end of this session, participants should be able to

- Outline the purpose and definition of strategic partners
- List the types of activities funded with packaged grants
- Apply for packaged grants

### ***Online resources***

Future Vision information and resources are available at [www.rotary.org](http://www.rotary.org) (keyword search “packaged grants”).

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- If your clubs or district participated in a packaged grant, include images and provide guidance on the application process.
- Include any packaged grants that the district or clubs are interested in applying for, and solicit participation if needed.
- Present an update on the status of packaged grants in the district.
- Consider scheduling a guest speaker from one of The Rotary Foundation’s strategic partners. Contact the Foundation for assistance.

### ***Speaking points***

- To enhance Rotarian service opportunities, Rotary develops strategic partnerships with organizations that have specialized knowledge or expertise in one or more areas of focus. Through these formal relationships, the Foundation secures resources such as funding, advocacy, or expertise and makes them available to Rotarians as packaged grants. Partnerships with high-profile organizations also raise the Foundation’s public image to different audiences and help attract new donors.
- Packaged grants are a unique feature of the new grant model. Grants are “packaged” — predesigned by the Foundation and the strategic partners — and offered as project opportunities for Rotarians.

- The grants are fully funded by the Foundation's World Fund and a strategic partner. Sponsoring Rotary clubs and districts are not asked to provide a financial contribution to the project.

Packaged grant projects can include scholarships, humanitarian projects, and vocational training. Because the initial framework of the project has already been created, Rotarians can focus their talents and energies on implementation.

Packaged grants may be of particular interest to clubs with limited resources and clubs with no previous Foundation experience.

- Oikocredit is one of our strategic partners. Headquartered in the Netherlands, it is one of the world's largest private providers of financing to microfinance institutions worldwide.
  - The microfinance institutions in turn make loans to entrepreneurs, with a special emphasis on women and those in rural areas.
  - Oikocredit supports a network of approximately 790 microfinance institutions in 70 countries and has reached over 17.5 million loan recipients.
  - This partnership supports the economic and community development area of focus.

Packaged grants with Oikocredit focus on developing local entrepreneurs by providing business and vocational skill training. Interested Rotary clubs partner with participating microfinance institutions in their communities. Together, the participating club and microfinance institution conduct a needs assessment and plan and implement the training.

For now, clubs and districts in India, the Philippines, and Uruguay will serve as the primary sponsors of these grants. International sponsor clubs and districts can serve in a supportive role.

- Strategic partner Aga Khan University (AKU) focuses on increasing the number and the skill set of professionals in the developing world by providing access to opportunities in higher education and by conducting research in critical fields such as health care and education.
  - AKU operates 11 campuses in eight countries, including the AKU School of Nursing.
  - The nursing curriculum reflects the needs and health systems in each community where the school is located.
  - This partnership supports the maternal and child health area of focus.

One packaged grant opportunity with AKU is for vocational training teams to train nursing educators in East Africa. Approximately three team grants are available each year. International sponsor clubs and districts can apply for a grant to recruit a vocational training team to travel to one of the three campuses (in Kenya, Uganda, or Tanzania) to conduct training with AKU nursing educators and other nursing instructors in the area.

Another AKU packaged grant opportunity supports scholarships for local nurses in Kenya, Uganda, and Tanzania to take advanced study at an AKU campus. Local Rotarians in the project countries will select the scholars and mentor them throughout their academic program. A total of 24 to 30 scholarships are awarded yearly for the three

campuses.

- Strategic partner Mercy Ships, founded in 1978, uses a hospital ship as a mobile base of operation to provide health care services to communities in need.
  - Its current ship, the *Africa Mercy*, is focused on West Africa and has a 450-member international crew, all volunteers.
  - Mercy Ships has previously provided ship-based services in Central America and Asia, working in a total of 53 developing nations.
  - This partnership supports the disease prevention and treatment area of focus.

The Foundation offers approximately four packaged grants per year with Mercy Ships. International sponsor clubs and districts can apply for a grant to recruit a vocational training team of medical professionals who will perform or assist in critical surgeries and provide training to local health care professionals. Potential teams could include surgeons, nurses, or anesthesiologists.

- UNESCO-IHE Institute for Water Education, based in the Netherlands, is another strategic partner. It is the largest postgraduate water education institution in the world. Its goal is to develop the capacities of professionals in developing and emerging countries, enabling people to solve their own water and sanitation issues.
  - Since 1957, the institute has provided postgraduate education to water professionals from more than 160 countries, the vast majority of whom come from the developing world.
  - Approximately 98 percent of their graduates return to their home countries upon graduation, and 87 percent are still active in the water sector 10 years after graduation.
  - This partnership supports the water and sanitation area of focus.

Through UNESCO-IHE, the Foundation offers eight packaged grants for graduate-level scholarships each year at the Institute for Water Education. Students from any district are eligible; potential candidates must already be admitted to one of three eligible master of science programs. Rotary clubs or districts in the student's home country will select candidates. Rotarians in the Netherlands will involve the scholars in cultural and Rotary events during their studies.

- Questions about packaged grants? Email [future.vision@rotary.org](mailto:future.vision@rotary.org) or go to [www.rotary.org](http://www.rotary.org) for application instructions.

## ***Discussion questions***

- Why would Rotary want to partner with other organizations?
- What are the benefits of packaged grants?
- Are there any packaged grants that you would consider applying for?

## ***Suggested activities***

- Have pairs of participants create a two-minute speech describing packaged grants.
- Have participants develop project ideas that could be replicated in multiple locations worldwide, outline how Rotarians would be involved in each project, and suggest the type of partner organization that would be needed.
- Have participants work in small groups to brainstorm the benefits of packaged grants or strategic partnerships.



# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Areas of Focus Through Global Grants**



*This presentation is for Future Vision pilot districts in 2012-13 and for all districts training for global launch in 2012-13 and 2013-14.*

### ***Learning objectives***

By the end of this session, participants should be able to

- List the areas of focus
- Understand the types of activities funded within each area of focus
- Understand areas of focus designations for Annual Fund contributions

### ***Online resources***

Future Vision information such as guidelines and related resources is available at [www.rotary.org](http://www.rotary.org) (keyword search “areas of focus”). Self-directed learning opportunities are available at [learn.rotary.org](http://learn.rotary.org).

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Include statistics from your district or country related to one of the areas of focus to demonstrate the need in that area. For example, include the illiteracy rate, the infant mortality rate, the unemployment rate, or the numbers of people living with certain diseases in your country or within your community.
- Include any district-developed global grant in the design phase that needs participation from Rotarians in the district.
- Present an update on the status of global grants in the district.
- Use photos of district activities that align with one of the six areas of focus.

### ***Speaking points***

- The six areas of focus reflect critical humanitarian issues and needs being addressed by Rotarians worldwide. They align Rotary with other international development efforts and advance the Foundation’s mission. Each of the areas, which are listed below, has specific goals that are outlined in the corresponding area of focus policy statement.
  - Peace and conflict prevention/resolution
  - Disease prevention and treatment
  - Water and sanitation
  - Maternal and child health

- Basic education and literacy
- Economic and community development

The following are examples of global grant projects aligned with the areas of focus.

- Clubs in Uganda and the United States received a global grant to provide training in peace-building for 200 teachers and 1,300 students at 10 high schools in Uganda. The sponsor clubs are working with the Great Lakes Center for Conflict Resolution in Gulu. In addition, “peace clubs” being created at the schools will use music, drama, and other means to provide ongoing education about conflict prevention and resolution in the local communities.

What makes this a global grant?

- Area of focus: Peace and conflict prevention/resolution
- Sustainable: After the grant project is completed, the center will integrate the training curriculum and peace clubs into its activities and continue to work with the 10 schools. The knowledge and skills acquired by the teachers and students will enable them to become lifelong agents for peace in their communities and the nation.
- Measurable: Success is measured by number of teachers and students trained.
- Budget: \$33,693

To learn more, read [the news story](#).

- Clubs in Mali and the U.S. sponsored a project to provide insecticide-treated bed nets, physician services, and medication to help prevent and treat malaria in Mali. A team of 24 local women will be trained as community health workers to diagnose, treat, and cure early cases of malaria in the home, before the disease progresses to the deadly stage. During its first three months, the Bite Malaria Back project made possible more than 3,000 patient visits at the Yirimadjo Health Center. It also facilitated more than 12,700 visits by community health workers to residents’ homes, resulting in the treatment of almost 900 children with malaria — over 80 percent within 48 hours of the onset of symptoms, when medical intervention is critical.

What makes this a global grant?

- Area of focus: Disease prevention and treatment
- Sustainable: Local women will be trained as community health workers to diagnose, treat, and cure cases of malaria.
- Measurable: Success is measured by number of women trained, number of health-center patient visits, number of community health-worker home visits, and number of children treated.
- Budget: \$60,000

To learn more, read [the news story](#).

- Clubs in Sierra Leone and the U.S. sponsored a project to install 71 water wells serving as many as 71,000 people in rural communities in Sierra Leone.

What makes this a global grant?

- Area of focus: Water and sanitation
- Sustainable: Three clubs in Sierra Leone and the nongovernmental organization World Hope International have committed to ensuring the long-term impact of the project. Local Rotarians are helping to choose locations for the wells, monitor their effectiveness after installation, and form community committees to maintain the wells.
- Measurable: Success is measured by number of wells installed and number of people served.
- Budget: \$303,517

To learn more, read [the news story](#).

- A vocational training team of pediatric heart surgery specialists from a children's hospital in a U.S. district traveled to a hospital in a Ugandan district to perform corrective heart surgeries and teach their counterparts surgical techniques and postoperative care.

What makes this a global grant?

- Team leader: 1 Rotarian physician
- Team members: 11 non-Rotarian medical professionals
- Area of focus: Maternal and child health
- Sustainable: The team developed a pediatric heart surgery training program for physicians, nurses, and operating room staff, and trained medical staff in postoperative care of children with congenital heart defects.
- Measurable: Success is measured by number of medical professionals trained and number of children who receive services.
- Budget: \$33,094

To learn more, read [the news story](#).

- Clubs in South Africa and the U.S. supported vocational training teams focused on learning about the challenges of teaching young children in rural villages in South Africa and urban communities in the U.S. Educators from both countries visited each other's schools and shared best practices in areas including preschool curriculum, facilities, and community support and established a system for online teacher training.

What makes this a global grant?

- Host sponsor club (Rustenburg, South Africa)
- International sponsor club (Bridgeport, Connecticut, USA)
- Area of focus: Basic education and literacy
- Sustainable: Local educators were trained in best practices, and training was provided to parents.
- Measurable: Success is measured by number of educators trained.

- Budget: \$75,000

To learn more, read [the news story](#).

- Districts in the U.S. and the Netherlands sponsored a scholar to earn a master's degree in development studies at Erasmus University's International Institute of Social Studies in Rotterdam.

What makes this a global grant?

- Area of focus: Economic and community development
- Sustainable: The scholar will learn about the challenges communities face at local and regional levels, as well as the challenges to sustainable development from social, economic, and political perspectives. She will put these skills into practice after graduation to assist communities in need.
- Budget: \$49,580

To learn more, read [the news story](#).

- Rotarians, and friends of Rotary, can now direct Annual Fund contributions to any area of focus. These additional opportunities are intended to attract new donors, including Rotarians who haven't previously donated as well as non-Rotarians and other organizations. Contributions directed to any of the six areas are included toward a club's annual giving goal and per capita calculations. Likewise, they are eligible for all Annual Fund recognition opportunities.
- Areas of focus-designated contributions do *not* generate DDF. Because SHARE contributions are the primary source of funding for Foundation programs, SHARE-designated contributions from every Rotarian, every year remain crucial.
- Consult these resources for additional information:
  - [learn.rotary.org](#) for online courses on the areas of focus
  - [Rotary's Areas of Focus booklet](#), which contains project ideas for each of the areas and outlines the Foundation's goals for each
  - The new areas of focus policy statements, which clearly articulate the purpose and goals of each area, outline specific eligibility criteria, and highlight elements of successful projects
- Questions about global grants? Contact <<*insert contact information for your district's global grants coordinator at the Foundation*>>.

## **Discussion questions**

- How can your club use the areas of focus to enhance Rotary's public image?
- Has your club worked on projects in the areas of focus?
- What are some of the benefits of having giving options in the areas of focus?

## ***Suggested activities***

- Have small groups of participants each list at least one global grant project idea for each area of focus.
- For a variation on the previous activity, split participants into six groups, one for each area of focus, and ask each group to create a project in that area. Consider providing needs assessment results that participants can work from.
- Provide a sample list of projects and ask participants to determine which projects are eligible for a global grant under the areas of focus. Consider using [\*Rotary's Areas of Focus\*](#) to discuss the goals of each area.

# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Scholarships**



*This presentation is for Future Vision pilot districts in 2012-13 and for all districts training for global launch in 2012-13 and 2013-14.*

### ***Learning objectives***

By the end of this session, participants should be able to

- Understand the difference between district and global grant scholarships
- Learn different ways to support scholarships
- Identify resources for Rotarians applying for grant funding for scholarships

### ***Online resources***

The program overview and related resources are available at [www.rotary.org](http://www.rotary.org) (keyword search “scholarships”). Self-directed learning opportunities are available at [learn.rotary.org](http://learn.rotary.org).

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Show photos of past scholars who have studied in one of the areas of focus.
- Include information on current scholars.
- Highlight district efforts to promote scholarships at local universities.

### ***Speaking points***

- This presentation gives an overview of scholarships under the new Rotary Foundation grants.
- Since 1947, The Rotary Foundation has awarded over US\$532 million in educational grants. Rotary recognizes the vital role of education in achieving peace. Traditionally, the Foundation has awarded scholarships through programs such as Ambassadorial Scholarships, Rotary Grants for University Teachers, and Rotary Peace Centers.
- Under the new grant model, Rotary will continue promoting peace through education. Clubs and districts will have more flexibility in sponsoring international and local scholars through global grants and district grants.
- Global grants can fund scholarships for one to four years of graduate-level study in the areas of focus for career-minded professionals. Scholarships must prepare scholars to make sustainable and measurable contributions to the community. A host sponsor and international sponsor work together to identify the scholar and submit the application. The minimum budget for global grants is US\$30,000.

Here are some examples of global grant scholarships:

- Districts in England and Canada sponsored a scholar to study urban renewal and preservation at a university in London. What makes this a global grant?
  - Host sponsor district in scholar's place of study (England)
  - International sponsor district in scholar's home country (Canada)
  - Area of focus: Peace and conflict prevention/resolution
  - Sustainable: After her studies, the scholar plans to work in the Balkans, converting buildings damaged by war into low-cost housing for displaced residents.
  - Budget: \$37,020
- Districts in Spain and the United States sponsored a scholar who studied Spanish and Latin American literature in Spain. What makes this a global grant?
  - Host sponsor district in scholar's place of study (Spain)
  - International sponsor district in scholar's home country (USA)
  - Area of focus: Basic education and literacy
  - Sustainable: After completing her studies, the scholar plans to develop community outreach programs to support underserved Latino populations in the United States.
  - Budget: \$66,700
- Districts in the Netherlands and Australia sponsored a scholar who received a master's degree in business administration at Erasmus University's Rotterdam School of Management. What makes this a global grant?
  - Host sponsor district in scholar's place of study (The Netherlands)
  - International sponsor district in scholar's home country (Australia)
  - Area of focus: Economic and community development
  - Sustainable: After completing his studies, the scholar plans to use his education and background in agribusiness to link farmers from developing countries to opportunities in the developed world.
  - Budget: \$30,000

To learn more, read [the news story](#).

- District grants can also support scholarships, and they have fewer restrictions on the study level (secondary school, university, graduate, or certificate), location (local or international), duration and area of study, or cost.

Scholarships supported with district grants are managed entirely by the district. Therefore, district leadership should determine the district's preferences, applications,

and timetables for district grant-funded scholars and share that information with clubs. Here are some examples of district grants:

- District 6200 (Louisiana, USA) sponsored a student from District 9210 (Malawi; part of Mozambique; Zambia; and Zimbabwe) who is earning her master's degree in social work at Louisiana State University.
- District 5360 (parts of Alberta and Saskatchewan, Canada) developed postsecondary scholarships for local high school graduates.
- District 2580 (part of Japan) developed a two-year scholarship at the Columbia University School of International and Public Affairs in New York City.
- The relevant resources available to assist clubs include:
  - Rotary Foundation scholarships document outlining suggested responsibilities and processes, in the *Grant Management Manual*
  - [E-learning module](#) on scholarships
  - *Rotary Grant News*, a monthly e-newsletter
- Questions about The Rotary Foundation? Contact [contact.center@rotary.org](mailto:contact.center@rotary.org).

### ***Discussion questions***

- How do your scholarships support club strategies, plans, and annual goals?
- How will you market these scholarship opportunities to potential recipients?
- How will you involve scholarship recipients in your club?

### ***Suggested activities***

- Marketing efforts to identify global grant scholarship candidates differ from those used to find Ambassadorial Scholars. Pilot districts have had success working closely with local universities to target incoming graduate students or graduating seniors who are considering graduate school. Have participants work in small groups to determine a marketing plan for both district and global grant scholars.
- Ask participants to work in small groups to create a plan to continue to involve scholarship recipients in your club after they complete their studies.
- Ask participants to review the goals of the areas of focus and discuss how scholarships can help to meet those goals.



# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Vocational Training Teams**



*This presentation is for Future Vision pilot districts in 2012-13 and for all districts training for global launch in 2012-13 and 2013-14.*

### ***Learning objectives***

By the end of this session, participants should be able to

- Define the difference between district and global grant vocational training teams
- Identify different ways to use vocational training teams
- Identify resources available to help Rotarians apply for district and global grant vocational training teams

### ***Online resources***

An article about the [Top 15 things Rotarians should know about global grants for vocational training](#); self-directed learning opportunities are available at [learn.rotary.org](http://learn.rotary.org).

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Include information on a vocational training team that needs participants.
- Use photos of district activities involving vocational training teams or Group Study Exchanges.
- Discuss how vocational training teams fit into the district's strategic plan and goals.

### ***Speaking points***

- This presentation gives an overview of vocational training teams under the new grant model.
- Vocational training teams are groups of professionals who travel, either to learn more about their vocation or to teach local professionals about a particular field. These teams can help expand the knowledge and skills of individuals and communities. The vocational training team concept is inspired by the successes of past grant programs, including Group Study Exchange and Volunteer Service Grants. Rotary clubs and districts can support vocational training teams with district grants or global grants.
- As a first step, clubs and districts are encouraged to examine the needs and strengths of the communities involved. Vocational training teams are most effective when they address local needs — problems or community deficits that can be alleviated by training — and take advantage of available strengths, which can include knowledge, skills, and resources.

- Next, clubs and districts should work together to create a project plan and apply for funding, either through global grants or district grants. During the first year of the Future Vision pilot, 26 districts used some of their district grant funds to support vocational training activities, and 5 percent of global grant proposals and applications included a vocational training team.
- Vocational training teams supported by global grants have a humanitarian purpose. To be eligible for global grant funding, the vocational training team must meet the following criteria:
  - The grant activities must be aligned with one or more area of focus. The activities may be multivocational but must share a common purpose in support of the selected area of focus.
  - The activities must increase the skills of either the team members or residents of a specific community.
  - The activities must be measurable.
  - The minimum project budget amount is \$30,000.
  - The activity must be sponsored by two Rotary clubs or districts: a host partner in the country where the activity takes place and an international partner outside that country. In 2012-13, both partners must be Future Vision pilot members; starting in 2013-14, all districts will be able to participate.
  - The team will consist of at least one Rotarian team leader (non-Rotarians will be considered with good reason) with general Rotary knowledge, leadership skills, international experience, and experience in the area of focus, and at least two participants with two years of work experience in the area of focus.

Some benefits of global grants are:

- There are no restrictions on participant age or duration of training. This includes the ability to stagger the team's travel.
- More than one team may travel under a single grant, and team members' travel may be staggered, if needed.
- Here's an example of a vocational training team sponsored by a global grant:  
A team of pediatric heart surgery specialists from a children's hospital in a district in the United States traveled to a hospital in a Ugandan district to perform corrective heart surgeries and to teach their counterparts surgical techniques and postoperative care.

What makes this a global grant?

- Host sponsor club in project country (Makindye, Uganda)
- International sponsor club (Greenfield, Indiana, USA)
- Team leader: 1 Rotarian physician
- Team members: 11 Non-Rotarian medical professionals
- Area of focus: Maternal and child health

- Sustainable: Team developed heart surgery training program for physicians, nurses, and operating room staff, and trained medical staff in postoperative care of children with congenital heart defects.
- Measurable: Success measured by number of medical professionals trained and number of children who received services.
- Budget: \$33,094

To learn more, read [the news story](#).

- Vocational training team activities can also be funded through district grants.
  - District grant activities must align with the Foundation's mission to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.
  - District grants can support many types of vocational training teams, whether they're similar to traditional Group Study Exchange teams or focused more on training. Participants can experience the host country's culture, observe how their professions are practiced abroad, exchange ideas, and lead training courses.
- Using district grants to support vocational training activities offers significant flexibility for clubs and districts, as there are no restrictions on the age of participants or duration of the training.
- Here are some examples of district grants that support vocational training teams:
  - District 6200 (Louisiana, USA) partnered with District 9600 (Australia; Papua New Guinea; Solomon Islands) to exchange vocational training teams focused on the environmental impact of oil spills. The teams traveled to disaster sites to evaluate the effects and recovery efforts, and then shared their analyses and ideas for ensuring access to clean water.
  - District 9270 (South Africa) sent a vocational training team to provide teacher training in mathematics, science, and classroom skills. With the support of teachers, parents, and the community, this training will help two high schools in Kwandengezi raise their passing rate on university entrance exams.
- Additional information on vocational training teams is available through the e-learning module at [www.learn.rotary.org](http://www.learn.rotary.org) and by subscribing to the e-newsletter *Rotary Grant News*.

## ***Discussion questions***

- How would you incorporate a vocational training team into a humanitarian project?
- With more flexibility for district grants, what other activities could be funded under vocational training teams?
- How does incorporating vocational training into humanitarian projects lead to greater sustainability?

### ***Suggested activities***

- Have participants work in small groups, with each creating a sample vocational training team that would fall under one of the areas of focus.
- Have participants, working in small groups, create lists of five ideas for district grants and vocational training teams.
- Have participants, working in small groups, discuss their vocations and ways they could use their skills for vocational training purposes.

# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Foundation Funding**



### ***Learning objectives***

By the end of this session, participants should be able to

- Understand the SHARE system
- Explain the three-year cycle
- Identify ways clubs can work with district leaders to fund projects using the District Designated Fund (DDF)

### ***Online resources***

Information on SHARE, the funding cycle, and related resources is available at [www.rotary.org](http://www.rotary.org). (keyword search “SHARE system”). Self-directed learning opportunities are available at [learn.rotary.org](http://learn.rotary.org).

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Tell club members how much DDF is available this year and how much will be available next year.
- Explain the district’s process for determining which activities get funding.
- Provide the name of a district leader whom club members can contact about available DDF.

### ***Speaking points***

- Rotary Foundation grants and programs are funded by contributions from Rotarians and friends of Rotary. Donors may designate support for
  - Annual Fund
  - Permanent Fund
  - PolioPlus Fund
- Contributions to the Annual Fund and earnings from the Permanent Fund are placed into the SHARE system, which
  - Shares funds between the World Fund and the District Designated Fund
  - Transforms Foundation contributions into Rotary Foundation grants
  - Allows clubs and districts to come together to determine how their contributions to the Foundation are spent, enabling them to participate in activities of particular interest to them

- At the end of the Rotary year, the SHARE system divides each district's Annual Fund-SHARE contributions, with 50 percent going to the World Fund and 50 percent to the district's DDF.
- The Trustees determine the spendable Permanent Fund earnings. If a district has contributions designated to Permanent Fund-SHARE, the spendable earnings on those contributions go into the SHARE system (50 percent to the World Fund and 50 percent credited to the district's DDF).
- The district determines how DDF is spent, and the Trustees determine how the World Fund is spent. The Trustees use the World Fund to support global grants, PolioPlus, and Rotary Peace Centers for districts worldwide.
- Under the Foundation funding cycle, contributions for Foundation activities are available for use three years after they are raised. For example, a district contributes US\$200,000 to the Annual Fund in 2010-11, and the contributions are evenly divided between DDF and the World Fund and available to be spent in 2013-14.

The three-year cycle gives districts time to plan projects and activities and allows the Foundation to use the investment earnings to pay for administration and fund development.

- Permanent Fund spendable earnings don't follow the three-year cycle; instead, 50 percent of the spendable earnings become available as DDF as soon as they are added to the SHARE system.
- Starting in 2013-14, all districts may use up to 50 percent of their DDF from three years before and any Permanent Fund spendable earnings for one district grant a year. The balance may go toward global grants and donations to PolioPlus or Rotary Peace Centers. Unused DDF carries forward into the next Rotary year and can be used for global grants or donations.

For example, a district with \$100,000 in DDF can use a maximum of \$50,000 for the district grant. The remaining amount can be used for global grants or for donations to PolioPlus, Rotary Peace Centers, or other districts.

- In 2012-13, nonpilot districts may use up to 20 percent of their DDF (excluding Permanent Fund earnings, if any) for one District Simplified Grant. The balance may go toward Matching Grants or donations to PolioPlus or Rotary Peace Centers.
- Any unused DDF (funds remaining after all grant applications and donations have been reported to the Foundation) from 2013-14 will be rolled over into 2014-15. However, these rollover funds cannot be used toward the 2014-15 district grant.
- The district Rotary Foundation committee, which includes the district governor, determines how to use DDF by gathering information from clubs about which Foundation activities they wish to participate in.
- <<Insert district-specific information such as
  - *Your district's planning calendar*
  - *Deadlines for clubs to request DDF*
  - *The process for determining how DDF is allocated*>>

- Questions about Foundation funding? Contact <<*insert district contact information*>>.

### ***Discussion questions***

- How can you use Foundation grants to motivate Rotarians to donate to the Annual Fund?
- What are the benefits of making donations to the Annual Fund?
- What types of activities should DDF be spent on?

### ***Suggested activities***

- At the end of the session, ask participants to explain the SHARE system to a partner as practice for explaining the system to other club members.
- Ask participants to form small groups to discuss the following scenario, and have one person from each group report on its discussion:

Your district receives more requests for DDF funding than it can fulfill. The district asks clubs to partner on activities requiring DDF.

Questions:

1. How would you identify partner clubs in your district?
  2. How can your club increase DDF for future use?
- Ask participants to brainstorm ways to increase donations to the Annual Fund. Record the responses on a flip chart.

# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Fundraising and Recognition**



### ***Learning objectives***

By the end of this session, participants should be able to

- Understand the differences between the PolioPlus Fund, the Annual Fund, and the Permanent Fund
- Discuss ways to promote contributions to The Rotary Foundation
- Understand the types of recognition available to thank those who make contributions

### ***Online resources***

All registered Member Access users can view their personal contributions, the gift acceptance policy, and the Permanent Fund financial report. The club president, secretary, treasurer, and Rotary Foundation committee chair can also view monthly contribution reports and club recognition summaries. General information about giving can be found at [www.rotary.org/contribute](http://www.rotary.org/contribute).

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Present the district's fundraising and recognition goals and progress.
- Have Paul Harris Society or Benefactor pins on hand, and immediately recognize Rotarians who wish to sign up as a result of the presentation.
- Promote Rotary's recurring giving program, Rotary Direct, as a way to motivate every Rotarian to participate every year.
- Include images of projects supported by the District Designated Fund.

### ***Speaking points***

- Our Rotary Foundation is unique: It belongs to Rotarians and is dedicated to furthering Rotary's programs throughout the world. Rotarians determine which projects and programs to support and the level of funding to provide. Because Rotary clubs operate in nearly every country in the world, Rotarians' truly constitute a global network of community volunteers.
- Rotarians support our Foundation through
  - PolioPlus, dedicated to global polio eradication
  - Annual Fund, the primary source of funding for Foundation grants and activities
  - Permanent Fund, which supports the Foundation in perpetuity
- The Every Rotarian, Every Year effort encourages Rotarians to participate in their



Foundation by volunteering for activities and contributing to the Annual Fund annually.

- Contributions to the Annual Fund support the Foundation's grants and programs through its SHARE system. Contributions are credited to the individual donor and the donor's club, and applied toward the club's and district's Annual Fund goals.
- By making a gift of US\$100 or more each year to the Annual Fund, a donor becomes a Rotary Foundation Sustaining Member. Recognition consists of a sticker that Rotarians can affix to their Rotary club name badge.
- By making a gift of \$1,000, a donor becomes a Paul Harris Fellow. Recognition consists of a certificate and lapel pin. Optional Paul Harris Fellow medallions are available for purchase. Lapel pins are given in recognition of multiple Paul Harris Fellows, who make contributions of \$2,000 to \$9,999. Based on their Paul Harris Fellow level, recipients may receive pins with simulated sapphire (blue) or ruby (red) stones.
- The Paul Harris Society is a district-administered recognition program for individuals who annually contribute \$1,000 or more to the Annual Fund, PolioPlus, or approved grants.
- Each year, The Rotary Foundation presents districts with club recognition banners for achievement in Annual Fund giving. These include:
  - Top Three Per Capita Giving Clubs (minimum \$50 per capita) in the district
  - 100% Paul Harris Fellow Club (every active club member is a Paul Harris Fellow at the time of the request; one-time-only recognition)
  - Every Rotarian, Every Year Club (Rotary club achieves a minimum of \$100 per capita in contributions from active members and 100 percent participation — that is, every active member contributing to the Annual Fund during the Rotary year)
  - 100% Rotary Foundation Sustaining Member Club (every Rotary club member personally contributes \$100 or more to the Annual Fund during the Rotary year)
- A \$100 contribution can provide:
  - Two desks for an elementary school in Honduras
  - 50 mosquito nets for women and children in Tanzania
  - One year of tuition for a high school student in China
- A \$1,000 contribution can provide:
  - One portable dental chair for providing dental care to indigenous children in Mexico
  - 400 pairs of eyeglasses for individuals in Nigeria
  - Small microcredit loans to enable 23 women in the Philippines to start businesses that will support their families
- A \$10,000 contribution can provide:
  - Three refurbished school buses for rural communities in Mexico
  - Bakery equipment at a vocational training center for disabled children in Sudan
  - Two water wells to serve villages in Haiti

- A \$60,000 contribution can provide:
  - Up to five one-time named Rotary Peace Fellowships in the professional development certificate program
  - Advances in knowledge and world understanding in fields related to peace studies and conflict resolution
- A \$75,000 contribution can provide:
  - Funds for a Rotary Peace Fellow to study at a two-year Rotary Peace Center in a field related to peace studies and conflict resolution
- Gifts to the Permanent Fund are held in perpetuity as part of an endowment. They are professionally invested, with a portion of the earnings used each year for purposes specified by the Trustees and the donors. The Permanent Fund offers donors a way to create their own lasting legacy with Rotary.
- Endowed naming opportunities enable donors to give a specific amount to the Permanent Fund, with the earnings used for a specific purpose as outlined below:
  - \$25,000 – to support SHARE or World Fund
  - \$50,000 – to provide general support to Rotary Peace Centers
  - \$100,000 – to provide general support for an area of focus
  - \$250,000 – to support donor's district participation in global grants or endow a Rotary Peace Fellow (certificate program)
  - \$500,000 – to support a specific area of focus and geographic area or endow a Rotary Peace Fellow (two-year master's program)
  - \$1,000,000 – to be individually directed according to the donor's wishes
- Benefactors are individuals or couples who have made either a provision in their estate plan to bequeath a minimum of \$1,000 to The Rotary Foundation or to make an outright gift of \$1,000 to the Permanent Fund. Recognition includes a commemorative certificate, an insignia that may be attached to a Rotary pin or Paul Harris Fellow pin, and a letter of appreciation.
- Individuals or couples who make a minimum gift of \$10,000 in their estate plans are invited to join the Bequest Society. Bequest Society members receive a crystal recognition piece and a lapel pin according to their contribution level.
- Individuals can become Major Donors with personal outright or cumulative contributions of \$10,000 or more to The Rotary Foundation. They may elect to receive a crystal recognition piece and/or lapel pins or pendants.
- Donors who contribute \$250,000 or more to the Foundation either as a one-time gift or over a number of years become members of the Arch C. Klumph Society. They receive a certificate, a crystal recognition piece, and a lapel pin/pendant, and their portraits are displayed in the interactive Arch C. Klumph Gallery. A traveling kiosk showing the gallery is on display at each International Assembly and RI Convention.

<b>Major Donor and Arch C. Klumph Society Recognition Levels (in US\$)</b>	
<b>Major Donor</b>	
Level 1	\$10,000 - \$24,999.99
Level 2	\$25,000 - \$49,999.99
Level 3	\$50,000 - \$99,999.99
Level 4	\$100,000 - \$249,999.99
<b>Arch C. Klumph Society</b>	
Trustees Circle	\$250,000 - \$499,999.99
Chair's Circle	\$500,000 - \$999,999.99
Foundation Circle	\$1 million or more

- The Rotary Foundation wants to fully endow the Rotary Peace Centers program and has set a goal of \$95 million by 2015. Most gifts will come from major gifts.
- If you know someone who is a strong supporter of The Rotary Foundation:
  - Alert your district fundraising committee chair.
  - Notify the appropriate staff member at [plannedgiving@rotary.org](mailto:plannedgiving@rotary.org).
  - Encourage Rotarians to visit [www.rotary.org](http://www.rotary.org) often.
  - Go to [shop.rotary.org](http://shop.rotary.org) to order publications and other materials.
  - Share personal stories of how the Foundation is improving lives around the world.
- Questions about annual giving? Contact [contact.center@rotary.org](mailto:contact.center@rotary.org).
- Questions about major gifts? Contact [majorgifts@rotary.org](mailto:majorgifts@rotary.org).
- Questions about benefactors and bequest gifts? Contact [plannedgiving@rotary.org](mailto:plannedgiving@rotary.org).

### ***Discussion questions***

- How can you motivate members of your club to give year after year to the Annual Fund?
- What is the current giving pattern among club members? How can you motivate them to give more?
- Why is recognition important?

## ***Suggested activities***

- Review the types of club recognition with participants and have them discuss how they can work with their clubs to achieve recognition.
- Ask participants to form three small groups and assign a fund to each (Annual Fund, Permanent Fund, PolioPlus Fund). Give each group flip chart paper and markers, and ask them to write down their determinations of the outcome for beneficiaries of the fund.
- Ask participants working in pairs to create a two-minute speech highlighting the programs that their contributions would support and how the Foundation changes lives.

# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Stewardship and Qualification**



*This presentation is for all districts. Slides 6-9 are intended for pilot districts in 2012-13 and for all districts training for global launch in 2012-13 and 2013-14.*

### ***Learning objectives***

By the end of this session, participants should be able to

- Identify good stewardship practices
- Understand the importance of being stewards of Rotary Foundation funds
- Define the requirements for club qualification

### ***Online resources***

Information on stewardship, reporting, and the Cadre of Technical Advisers is available on [www.rotary.org](http://www.rotary.org) (keyword search “qualification” or “Cadre of Technical Advisers”).

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Provide examples of good stewardship practices that are in place.
- Explain the district’s process for handling misuse of funds.
- Provide a district contact for stewardship questions and for reporting misuse.
- Outline any additional district requirements for club qualification.

### ***Speaking points***

- Stewardship is the responsible management and oversight of grant funds from The Rotary Foundation. Proper stewardship is the responsibility of each Rotarian. Implementing good stewardship practices ensures that grants are well-managed and that grant funds are used according to the Foundation guidelines in order to benefit populations in need. Careful grant management also sustains donor confidence in the Foundation and can increase donations.
- Stewardship includes:
  - Project supervision by Rotarians who are actively involved in the project and who ensure that the grant terms and conditions are followed
  - Implementing projects as approved by the Foundation and having the Foundation approve any changes
  - Following standard business practices, such as limiting the use of cash for transactions and maintaining a record of all transactions
  - Reporting irregularities to the district so stewardship issues are properly

- investigated and resolved
  - Submitting timely, complete, and accurate reports to the Foundation to verify how funds were spent
  - Retaining appropriate documents
- The Foundation oversees grant fund stewardship in these ways:
  - Tracking reporting compliance
  - Monitoring by The Rotary Foundation Cadre of Technical Advisers
  - Random and targeted audits
  - Investigating allegations
  - Stewardship seminars
  - Qualification
- Pilot districts in 2012-13 and all clubs in 2013-14 will need to be qualified by their districts before they receive global or packaged grant funds from the Foundation. Qualification ensures that your club has proper financial and grant management practices in place to manage Rotary Foundation funds. Clubs need to be qualified every year in order to receive global grant funds. The district decides whether its clubs need to be qualified to receive district grant funds.
- The Rotary Foundation has two requirements for club qualification (the district may have additional requirements):
  - The president-elect or a designated club representative must attend the grant management seminar.
  - The club president and president-elect must read, sign, and submit the club MOU to their district and agree to follow its requirements.
  - <<If the district has additional qualification requirements, list them here.>>
- <<Insert dates and other information on planned grant management seminars being held in the future.>>
- The club memorandum of understanding (MOU) is a binding agreement between the club and its district, explaining the required measures the club must undertake to ensure proper implementation of grant activities and management of Rotary Foundation grant funds. By signing this document, the club agrees that it will comply with all Foundation requirements.
- Questions about stewardship? Email RI's Stewardship Department at [fvqualification@rotary.org](mailto:fvqualification@rotary.org).

## ***Discussion questions***

- How do good stewardship practices help the project participants, beneficiaries, and The Rotary Foundation?
- What steps can your club take to ensure responsible fiscal management before starting a grant?
- What stewardship practices does your club already follow that can be applied to

managing grant funds?

### ***Suggested activities***

- Have participants work in small groups to discuss current measures that clubs have in place to ensure Foundation funds are managed properly.
- Ask participants working in groups of three or four to come up with a plan for handling suspected misuse of Foundation funds. Ask each group to report on its discussion.
- Ask participants working in small groups to list how good stewardship practices result in increased donations to The Rotary Foundation.

# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Alumni Relations**



### ***Learning objectives***

By the end of this session, participants should be able to

- Identify Rotary Foundation alumni
- Discuss ways to connect with alumni
- Discuss ways to involve Foundation alumni in their clubs

### ***Online resources***

The Alumni Relations overview and related resources are available at [www.rotary.org](http://www.rotary.org) (keyword search “alumni”).

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Invite an alumnus/a as a keynote speaker.
- <<*Insert district contact information for your district’s alumni subcommittee chair*>>
- <<*List alumni services and activities for the district coordinators*>>

### ***Speaking points***

- The following award recipients are considered Rotary Foundation alumni:
  - Ambassadorial Scholars: 40,000 alumni
  - Group Study Exchange participants: 70,000 alumni
  - Rotary Grants for University Teachers recipients: 500 alumni
  - Rotary Peace Fellows: 600 alumni
  - Rotary Volunteers: 6,500 alumni
  - Global grant recipients: 27 scholars, 83 vocational training team members
  - District grant recipients (if nominated by sponsor district)
- Of the 117,500 total alumni, 22,000 are Rotarians and 3,000 participated in more than one activity.
- Clubs should be building relationships with alumni to encourage them to maintain a lifelong relationship with Rotary. They can do this by
  - Inviting them to join their club or a Rotaract club
  - Asking them to participate in an alumni association
  - Inviting them to participate in a club or district project



- Inviting them to assist in participant selection and orientation
- Encouraging them to contribute to the Foundation
- More formal ways for clubs to maintain their relationships with alumni include:
  - Rotary Alumni Celebration (held before the annual RI Convention)
  - Alumni Association of the Year Award
  - Global Alumni Service to Humanity Award (the Foundation's highest honor, which recognizes outstanding alumni who exemplify Service Above Self)
  - Alumni associations (more than 110 associations around the world)
- Ensure alumni in your clubs stay connected to Rotary through *Reconnections*, a bimonthly e-newsletter. It is issued in seven languages and reaches approximately 20,000 alumni and Rotarians.
- Questions about alumni? Contact [contact.center@rotary.org](mailto:contact.center@rotary.org).

### ***Discussion questions***

- How can Rotarians involve alumni in their clubs?
- How can Rotarians use alumni to tell Rotary's story to the community?
- Which district grant recipients would you consider alumni?

### ***Suggested activities***

- Ask participants to work in small groups to create a plan for marketing the good work of alumni within the community.
- Ask participants to work in small groups to list five activities they could get alumni involved in this year at the club level.
- Ask participants to work in small groups to determine criteria that your club will use to determine which district grant recipients will become alumni.

# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Humanitarian Grants**



*This session is for clubs in nonpilot districts in 2012-13.*

### ***Learning objectives***

By the end of this session, participants should be able to

- List Matching Grant guidelines
- Understand the criteria for District Simplified Grants
- Understand the difference between funding sources for Matching Grants and District Simplified Grants

### ***Online resources***

The program overview and related resources are available at [www.rotary.org](http://www.rotary.org) (keyword search “Humanitarian Grants”). Refer to the document titled [Preparing Your Clubs for Rotary Foundation Grants in 2013](#) to learn more about transitioning clubs to new Rotary Foundation grants.

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Include photos of Matching Grants and District Simplified Grants from projects sponsored by clubs in the district.
- Include the number of grants your district participated in last year.
- Insert district contact information for your district’s grants subcommittee chair.
- List the District Designated Fund (DDF) amount that your district has available and district deadlines.

### ***Speaking points***

- This presentation gives an overview of Matching Grants and District Simplified Grants.
- Matching Grants help Rotary clubs and districts carry out international humanitarian projects around the world. These projects are done within a partnership between a club or district in the project country and a club or district outside of the project country.
- Matching Grant awards can be between US\$5,000 and \$200,000. Funding for Matching Grants comes from the District Designated Fund, which is matched \$1 for \$1, and cash contributions, which are matched \$0.50 to the \$1 by funds from the World Fund.

- There are two types of Matching Grants: regular Matching Grants (Foundation award \$5,000-\$25,000) and competitive Matching Grants (Foundation award \$25,001-\$200,000), which require more information and planning, and must be approved by the full Board of Trustees.
- Clubs and districts can submit Matching Grant applications between 1 July and 31 March. A large percentage of grant applications are submitted in March. To ensure the timeliest service from the Foundation, districts should submit applications between October and February.
- Competitive Matching Grants should be submitted to The Rotary Foundation between 1 July and 1 August in order to receive approval at the October/November Trustees meeting and between 1 August and 15 December to receive approval at the March/April Trustees meeting (deadlines are subject to change). If your club or district wishes to submit a Competitive Matching Grant, please contact the Foundation directly for deadline information.
- Matching Grants requirements include:
  - Active Rotarian participation (in addition to financial contributions), such as communication, sharing of technical expertise, visits to the project, publicizing the project, and promoting the good work done by Rotarians and the Foundation
  - Addressing a humanitarian need within a community
  - Promoting the Foundation
  - Adhering to the [Terms and Conditions of Matching Grant Award](#)
- In addition, each partner club/district must form a three-person committee to oversee the project; they must plan the project jointly and communicate with each other throughout the life of the project.
- Reporting requirements are an important part of every Matching Grant project. Both sponsors are responsible for providing a progress report to update the Foundation on the project at least every 12 months, with a final report detailing the project's outcome within two months of the project's completion. Sponsors should decide which partner will take the lead in completing the final report.
- District Simplified Grants are smaller grants that support service projects in the local community or internationally. District Simplified Grants are awarded to the district, which then distributes the funds to clubs.
- District Simplified Grants use a maximum of 20 percent of a district's DDF. *Districts should announce the amount of DDF being made available to clubs this year.*
- <<Insert the district's deadline for clubs to submit requests for funds.>>
- District Simplified Grant requirements:
  - Funds must be used to purchase itemized services or goods that meet a direct need. Some eligibility questions to consider:
    1. Is this particular community in need of this project?
    2. Does the community currently lack access to this information or

- service? Would it be difficult to meet this need with other resources?
  - 3. Does the project target underserved populations?
  - 4. Can you clearly explain who benefited from the project and how many benefited?
  - 5. How does this project provide a direct benefit to the community?
- Rotarians must be actively involved.
  - Wishes of receiving community must be respected.
  - Project must adhere to the [Terms and Conditions of District Simplified Grants](#).
- Individual project reports for each project funded through the District Simplified Grant need to include:
  - A detailed description of what the grant was spent on with beneficiary information
  - A description of Rotarian oversight, management, and involvement
  - An itemized list of expenditures
  - The signature of a Rotarian from the club or district sponsoring the project verifying the report
- The Matching Grants and District Simplified Grants programs will end in July 2013 when the Future Vision model is launched worldwide. Report on finished grants promptly and close them. Clubs cannot have more than 10 open grants. Review *Preparing Your Club for Rotary Foundation Grants in 2013* for additional information.
- Questions about a specific grant? Email [contact.center@rotary.org](mailto:contact.center@rotary.org).  
 Questions about your district's available DDF or getting involved in a grant? Contact your district Rotary Foundation grants subcommittee chair.

### ***Discussion questions***

- Why are local Rotarians the best experts for projects in their community?
- What roles have you had in a grant before?
- Why is it important to involve the receiving community?

### ***Suggested activities***

- Ask participants to get into small groups and discuss ways to identify good project partners and maintain contact.
- Have participants work in small groups to create a list of the responsibilities that the grants subcommittee would have.
- Ask participants to get into small groups to create a list of projects that their clubs are interested in. Have participants identify any potential partnerships with the district.

# ***District Rotary Foundation Seminar Manual***

## **Session Outline: Transitioning to New Rotary Foundation Grants**



### ***Learning objectives***

By the end of this session, participants should

- Understand the basics of the new Rotary Foundation grants
- Be able to explain the transition process for Future Vision global launch in July 2013
- Know how to prepare their clubs for Future Vision global launch

### ***Online resources***

The Future Vision overview and related resources are available at [www.rotary.org](http://www.rotary.org) (keyword search “Future Vision”).

### ***District-specific information***

Consider customizing this presentation to your district in these ways:

- Invite a regional Rotary Foundation coordinator, assistant regional Rotary Foundation coordinator, or a representative from a neighboring pilot district to discuss how the pilot is working, share tips on how to prepare, and answer questions.
- Include images and examples of grants, scholarships, or Group Study Exchange teams that met one of the six areas of focus.
- Include information on current district processes and how they may change as a result of Future Vision global launch.

### ***Speaking points***

- Why was the Future Vision Plan created?
  - Over the past decade, the Foundation has experienced immense growth. For example, the first 10,000 Matching Grants were awarded during the program’s first 35 years (1965-2000). However, it took only four more years to award the second 10,000. With this volume of grant activity, it was difficult administratively for the Foundation to keep pace with Rotarians.
  - The Foundation is an evolving organization. In order to stay relevant in the philanthropic world, it was important to define areas we wanted to focus on.
- With feedback from Rotarians, the Trustees created a plan to enhance the sustainability of the Foundation’s activities, increase our significance on the world stage, and simplify our programs.
- The goals of the Future Vision Plan:

- Simplify the number of programs and the processes
- Focus Rotarian service efforts to increase Rotary’s global impact
- Support both global and local Rotarian efforts
- Increase the sense of ownership at the district and club levels
- Enhance Rotary’s public image
- The Trustees of The Rotary Foundation have identified six [areas of focus](#) that reflect critical humanitarian issues and needs that Rotarians are already addressing worldwide:
  - Peace and conflict prevention/resolution
  - Disease prevention and treatment
  - Water and sanitation
  - Maternal and child health
  - Basic education and literacy
  - Economic and community development
- The Future Vision Plan offers three types of grants under the new grant model: district, global, and packaged grants.
- District grants are a single, annual block grant made to districts for up to 50 percent of their District Designated Fund (DDF). District grant activities must support the mission of the Foundation (but aren’t tied to the areas of focus), may take place locally or internationally, and fund smaller-scale activities and projects.
- The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.
- Global grants support long-term sustainable projects and must be aligned with one or more of the areas of focus. The minimum grant award is US\$15,000 (for a total budget of at least \$30,000). DDF is matched 100 percent, and cash is matched at 50 percent from the World Fund.
- Packaged grants provide opportunities for Rotary clubs in pilot districts to work with The Rotary Foundation’s strategic partners on predesigned projects and activities funded entirely by the World Fund. These grants are implemented by Rotarians in conjunction with the Foundation’s strategic partners and are fully funded by the World Fund and the strategic partners. These projects and activities support the [areas of focus](#) and can include scholarships, humanitarian projects, and vocational training.
- Because the initial work of finding a strategic partner and designing the framework of the project has already been done, Rotarians can focus on implementing the project. Participation could include:
  - Assessing community needs
  - Providing technical expertise, direct service, or advocacy
  - Promoting and publicizing the project
  - Monitoring and evaluating the project

- The requirements for international partnership between project sponsors vary. Currently, our strategic partners include Aga Khan University, Mercy Ships, Oikocredit, and UNESCO-IHE Institute for Water Education. Go to [www.rotary.org](http://www.rotary.org) to learn more.
- Clubs need to be qualified by the district to receive global or packaged grant funds. (The district decides whether its clubs need to be qualified to receive district grant funds.) Qualification ensures that your club has proper financial and grant management practices in place to manage Rotary Foundation funds.
- After the club is qualified, club members can apply for global grants, review grant status, and submit reports online through Member Access.
- Clubs can prepare for full launch of the new grant structure in 2013 in these ways:
  - Design humanitarian projects in an area of focus.
  - Seek out a pilot district and learn from them.
  - Take advantage of training opportunities, resource materials, club-level webinars, the *Grant Management Manual*, and self-paced courses on various topics at [learn.rotary.org](http://learn.rotary.org).
  - Appoint a club Rotary Foundation committee chair and ensure that the club president or the club secretary reports the appointee in Member Access.
  - Complete training to qualify your club. Attend a grant management seminar and ensure that your club president and club president-elect agree to and sign the club memorandum of understanding.
  - Ensure grant reports are submitted. Clubs may have no more than 10 open grants at a time. Also, no new grant applications will be accepted if clubs are overdue on reporting for prior grants.
  - Begin applying for global grants. Partner with other clubs in your district to create larger projects and activities.
  - Attend RI Convention workshops on the new grants.
- Find more information:
  - RI website ([www.rotary.org](http://www.rotary.org)) for the most current information
  - Future Vision-related online courses at [learn.rotary.org](http://learn.rotary.org)
  - *Rotary Grant News* (free monthly e-newsletter)
  - Your regional Rotary Foundation coordinator
  - Contact Center ([contact.center@rotary.org](mailto:contact.center@rotary.org)/866-9-ROTARY)
- Questions about the Future Vision pilot? Contact [futurevision@rotary.org](mailto:futurevision@rotary.org).

## ***Discussion questions***

- What are some ways your club will begin to prepare for Future Vision global launch?
- How can your club begin aligning club activities with the areas of focus?

- What project or activities that interest your club would you request funds for as part of the district grant?

### ***Suggested activities***

- Have participants work in small groups to brainstorm grants, scholarships, and Group Study Exchange teams that have included at least one of the areas of focus.
- Ask participants to share with a neighbor a one-minute speech about Future Vision, highlighting the benefits of the new grant model.
- Ask participants to identify a pilot club or district that can serve as a mentor during the transition.