



A FOUNDATION FOR THE FUTURE

PowerPoint Presentation for Rotary Clubs

Slide 1

These slides and accompanying notes have been prepared to help districts communicate with their clubs about the Future Vision Plan and the three-year pilot. Approximately 100 districts will be selected to test the new grants model between 1 July 2010 and 30 June 2013.

Slide 2

Future Vision is a

- strategic plan for The Rotary Foundation
- new approach to how the Foundation provides grants to clubs and districts
- way to build on success of Foundation programs, such as PolioPlus, Health, Hunger and Humanity Grants, and Rotary Centers for International Studies
- means to better align community service projects around the world
- new structure and organization of committees handling Foundation activities at the district and club level

Slide 3

Rotary clubs will play an important role in the Future Vision of The Rotary Foundation.

- Clubs are encouraged to learn about the plan and confirm whether or not they would like their district to help test or -- "pilot"-- the new grant-making model.
- Clubs in the pilot districts are expected to apply for grants to fund their humanitarian and educational activities.
- Clubs in nonpilot districts using the current Foundation programs will remain up to date on how the pilot phase proceeds.

Slide 4

The Rotary Foundation is Rotary's charitable organization.

The motto of The Rotary Foundation is **doing good in the world.**

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.**

Slide 5

Over the past two decades, Rotarians have increasingly relied on The Rotary Foundation to help them address humanitarian and educational needs locally and abroad.

As Rotarians generously increased their giving to the Foundation and proposed additional ways to address humanitarian and educational needs, the Foundation responded by offering new programs.

Some examples of this program growth include the establishment of Health, Hunger and Humanity (3-H) Grants in 1979 and the exponential growth in Matching Grants in the past 10 years. District Simplified Grants were created in 2003 and became a popular way for districts to distribute grant funds directly to clubs for projects in their own communities and abroad.

However, it is the Foundation's focused efforts on polio eradication that have led to its most internationally recognized accomplishments and attracted support and funding from governments, NGOs, and most recently the Bill & Melinda Gates Foundation, which has committed a total of \$355 million to The Rotary Foundation.

The growth in activity in the Educational and Humanitarian program areas has made it increasingly difficult for these programs to produce high impact, focused, and sustainable outcomes while providing timely service. As the Foundation adapted to the increasing numbers of grant requests, its processes became more complex, larger, and less efficient. Rotarians demand and deserve a more simple and more effective Foundation that builds on the lessons learned over the last 30 years.

Slide 6

Based on feedback from approximately 10,000 Rotarians around the world who participated in surveys and focus groups: the Future Vision Plan has the following objectives:

- Strengthening the impact of club projects on beneficiaries
- Sharpening the focus of overall grant activity
- Transferring more decision-making locally
- Partnering with other organizations on the corporate level to leverage foundation funding and Rotary's resources
- Simplifying the Foundation to help expedite grant processing
- Increasing visibility and the image of Rotary locally and globally

Slide 7

A major objective of Future Vision is to strengthen the impact of the projects and activities conducted by Rotarians.

Rotary Foundation Global Grants will enable Rotarians to identify projects that have greater impact on the beneficiaries by offering support in designing projects with sustainable outcomes. These projects will be developed in partnership with other clubs and districts.

Slide 8

Rotary Foundation Global Grants will enable Rotarians to identify projects that address needs in six areas of focus that were developed based on the Foundation's mission statement and the types of activities most commonly seeking support for funding from the Foundation. The Foundation will provide a match for larger, more sustainable projects developed by clubs and districts in these six areas as well as offer full funding to clubs and districts that implement pre-designed and packaged grant opportunities that address the areas of focus.

Slide 9

Another objective of Future Vision is to transfer more decision-making related to grants from the Foundation to the club and district level.

Districts will administer Rotary Foundation District Grants locally. The Foundation will issue district grants in one block amount at the start of the year. The district can then use funds in any increments to fund humanitarian and educational projects and activities either locally or abroad. These projects and activities must simply relate to the mission of The Rotary Foundation and will not be limited to the six areas of focus.

Districts will continue to decide how to use their District Designated Funds (DDF) to apply for Rotary Foundation Global Grants. Global grants provide matching funds from the Foundation for projects and activities that relate to the six areas of focus. Districts can determine the areas of focus and the amount of DDF used each year for the global grant projects they sponsor.

Slide 10

Future Vision will also help the Foundation enhance the community service work of Rotarians by establishing strategic partnerships with other organizations. The Foundation will leverage Rotary's resources worldwide, both in human and financial terms, and involve others in the Foundation's mission. Some of the benefits of strategic partnerships for the Foundation will be cost sharing, grant funding, technical expertise, and support with advocacy efforts.

Slide 11

Another important objective of Future Vision is to simplify the Foundation and expedite grants processing.

By offering only two grant types--district grants and global grants—the Foundation can use the same funding approach for humanitarian projects, scholarships, and vocational training teams. There will also be streamlined reporting requirements for grants.

Rotarians will enjoy faster grants processing on the part of the Foundation. By relying more on advance training, a refined district committee structure, clear stewardship controls, and electronic payment methods, the Foundation will decrease the amount of time between the submission of a grant application and the issuance of funds. Under the new grants model, scholars will already have university admission, vocational training teams will have selected their members, and letters of support will have been secured from the proposed host districts before the global grant application is submitted, reducing the time between submission of the application and the grantee's travel abroad.

Slide 12

Another objective of Future Vision is to increase the visibility and image of the Foundation and Rotarians' efforts around the world.

Rotary will be recognized as a premier foundation as Rotarians begin to make a greater impact in the areas of focus and partnerships are established with major international organizations and corporations. In short time, The Rotary Foundation will be viewed as a partner of choice.

Rotarians will begin to experience the same success in public relations with their new Foundation grants activity as they have seen with the PolioPlus Program. This increased visibility will lead to increases in Rotary membership and donations to the Foundation, which in turn will lead to more grants.

Slide 13

Nearly all of the educational and humanitarian activities for which clubs and districts seek funding from the Foundation will be supported through either Rotary Foundation Global Grants or Rotary Foundation District Grants.

So what are some examples of projects or activities supported by global grants?

- Clubs and districts in two countries partner together to develop an international safe drinking water, sanitation, and hygiene education project that will benefit 100,000 people in an urban area with a match from a Rotary Foundation Global Grant. The grant funds equipment and training expenses. The project will be sustained years beyond the expenditure of the grant funds as Rotarians have negotiated support from government agencies and the Foundation's strategic partners to help provide funding, training, and ongoing maintenance.
- A district sponsors a scholar to another country to enroll in a two-year master's degree program in the field of water management. As part of the scholarship, the student conducts field research for three-months in India visiting water distribution systems in rural areas. While on site, the scholar also helps to share techniques proven successful in locating and sinking wells to tap new sources of ground water. The scholar uses supplies and equipment that she brought with her to India. The global grant covers the scholar's expenses before she departs—for example visa application, participation in a regional outbound orientation seminar for Foundation grantees, and airline ticket. The grant also covers the scholar's expenses while abroad—for example tuition, language training, housing, food, and costs associated with her field research and supplies while in India.
- Clubs and districts apply for a Rotary Foundation Global Grant to help implement an international malaria project that has been designed with support from one of the Foundation's strategic partners to distribute bed nets and malaria treatments. The partner organization helps provide surveillance and training in collaboration with Rotarians on the ground who are distributing bed nets and training people to use them in rural areas.
- A vocational training team of ten physicians travel to another country to study how healthcare professionals treat foot injuries resulting from various diseases. As part of their activities, the team purchases supplies in the host community and conducts a hands-on workshop to instruct people on how to locally construct inexpensive footwear that prevents foot injuries common in those suffering from diseases that lead to such wounds. The global grant covers the team's expenses before it departs—for example visa applications, inoculations, participation in a regional outbound orientation seminar for Foundation grantees, language training, and airline tickets. The grant also covers the team's expenses while abroad—for example housing, food, supplies to construct the footwear, and hosting the workshop. The district includes in the grant the cost for a reciprocal visit of a vocational training team from the other country where they can receive specialized training.

The Foundation will measure the results of these projects to demonstrate their cumulative global impact in each of the areas of focus. The results will be shared with Rotarians and the Foundation's strategic partners and publicized globally.

Slide 14

So what are some other examples of projects or activities supported by Rotary Foundation District Grants?

International travel for a local doctor to volunteer at a clinic. The district has complete control over the length of travel and who is qualified to go. Possible travelers could be non-Rotarians, Rotarians, Rotaract members, spouses of Rotarians, etc. The district will also have the flexibility to cover any immunizations, visas, hotel costs, supplies relating to the project.

Scholarship for a student to attend a local or international university. The district will be able to determine the area of study, length of study term, and the age and previous experience the scholar should have. The scholarship could fund their travel, tuition, books, and other school fees.

Donating art supplies for an after-school youth program. The district can choose to do this local project in conjunction with a single club or as a districtwide project. They will also be able to provide \$500 worth of supplies or \$15,000 worth of supplies, depending on how the district chooses to use these funds.

Send ShelterBox containers in response to natural disaster in another district. The district may have initially earmarked funds for an after school program. After learning about a recent disaster, the district can change its original plans and use that funding to respond to the disaster.

Support a district project funded primarily by the clubs. Rotarians from several Rotary clubs in the district work together to develop a water project in a rural village and have raised some funding on their own but need a small amount more to complete the project and purchase the necessary equipment. The district distributes some of their district grant funds to the clubs involved to complete this small humanitarian project in their district.

Hold a professional exchange with another district similar to the current Group Study Exchange program. The district could select participants to travel based on their own requirements and use district grant funds to purchase the airfare and other travel-related expenses. The district might also choose to use these funds to bring a team from another district as part of the exchange.

All of these activities funded with Rotary Foundation District Grants are eligible provided they fall within the overall mission of the Foundation.

Slide 15

The Foundation will implement the new grants model on a limited basis during a three-year pilot phase, selecting a diverse group of approximately 100 districts to participate. Districts must apply for the pilot by 15 May 2009. The application will require the approval of the district leadership and at least two-thirds of Rotary clubs in the district.

Slide 16

Rotary clubs in pilot districts will:

- Play a role in shaping the final version of new grants model.
- Use the improved grant-making model for activities taking place starting with the 2010-11 Rotary year.
- Provide direct feedback to RI regarding how the new grants model is functioning.
- Receive special training from the district and the Foundation on using the new grants model.
- Be able to develop partnerships with the other pilot districts.
- Be well prepared when the grants model is implemented worldwide, and most likely sought out by clubs in former nonpilot districts interested in partnering with experienced, "veteran" pilot district Rotary clubs.

Slide 17

There will also be challenges for clubs in pilot districts, who will

- Need to learn and adapt to new rules and guidelines for grants.
- Need to attend training sessions conducted by their district on new grants model in early 2010.
- Need to demonstrate flexibility and patience in coping with unanticipated changes to the new grants model during the pilot.
- Need to commit to being part of the pilot for all three years of the test phase.
- Find some of their funding options for the larger, international global grants limited if they want to work with a partner club in a nonpilot district.

Slide 18

During the pilot phase, which starts 1 July 2010 and runs through 30 June 2013, pilot districts may be involved with current Foundation programs and grant activities by:

- Using district grants locally or internationally, in both pilot and nonpilot districts
- Sending outbound international scholars and vocational training teams through the new district or global grants
- Hosting inbound Ambassadorial Scholars and Group Study Exchange Teams, as the pilot district is not funding these individuals
- Receiving World Fund match from the Foundation for both District Designated Fund and restricted cash contributions for global grants

Slide 19

The last 30 years have resulted in tremendous growth and unprecedented accomplishments for The Rotary Foundation. Building on the success and the lessons learned during this time and feedback received from Rotarians, the Future Vision Plan has been designed to offer an exciting new way to energize and advance our Foundation into the future. The pilot phase of the Future Vision plan will provide an opportunity to further refine the grant making model and help ensure that it meets the needs of Rotarians and helps the Foundation to best utilize its resources to achieve its mission. With the support of clubs and districts this vision can become a reality....*The Future of Rotary Is in Your Hands.*

Slide 20

This concludes the presentation on The Rotary Foundation's Future Vision Plan. To learn more about the plan and the pilot, please visit the RI Web site at www.rotary.org/futurevision.