

FUTURE VISION PLAN

Rotary Foundation Scholarships for Future Vision Pilot Clubs and Districts



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INTRODUCTION

The Future Vision Plan builds on the very best of Rotary's history with scholarships while expanding opportunities and simplifying rules, in order to make funding education easier than ever. To experience the greatest success with scholarships under Future Vision, it is best to utilize the model as it is presented rather than attempt to re-create the Ambassadorial Scholarships program. With that in mind, we created this guide to illustrate what is possible.

SCHOLARSHIP TYPES

Future Vision offers maximum flexibility in funding scholars. Districts can determine the types of scholars they wish to sponsor using funds from a district grant. These could include:

- Undergraduate or graduate students studying locally, any subject matter
- Undergraduate or graduate students studying abroad, any subject matter
- Study periods of any length (language training, a certificate program, a semester, a year or more)

The district leadership should determine its own preferences, applications, and timetables for district grant-funded scholars. Your Future Vision coordinator at the Foundation is always available to help, and can provide examples of how other districts have organized their district grant scholarship process.

The Foundation also awards scholarships through global grants, which may or may not be a component of a larger grant application (e.g., scholarship plus a humanitarian project). These scholarships are funded using cash and/or DDF allocations and are matched by the World Fund, making them a cost-effective choice. These scholarships fund:

- Graduate students studying abroad in one of the six areas of focus
- Scholarships lasting one to four years, thereby enabling Rotarians to fund entire degree programs

TIMELINES

District grant scholarship applications adhere to internal district timelines.

Global grant scholarship proposals and applications are accepted on a rolling basis throughout the year, although applications and payment information should be submitted at least three months before studies begin in order to allow adequate time for Foundation review and processing. Applicants must provide proof of admission at the time of application; the DDF allocation is drawn from the year in which the application is approved. Clubs may sponsor applicants independently, using cash for a World Fund match. Alternatively, clubs may work through their districts to obtain DDF funding for a World Fund match. Districts that decide to

organize a districtwide competition for global grant scholarships will need to publicize any deadlines they set for this process.

APPLICANT ELIGIBILITY

District grant scholars aren't required to study at the graduate level or to undertake studies in one of the six areas of focus. However, district grant scholars must meet whatever eligibility criteria the district establishes. For example, a district may decide to sponsor a scholar who possesses outstanding ambassadorial traits.

Global grant scholars are individuals who are pursuing a career in one of the six areas of focus. Their graduate-level educational goals should support this career interest.



Peace and Conflict Prevention/Resolution



Disease Prevention and Treatment



Water and Sanitation



Maternal and Child Health



Basic Education and Literacy



Economic and Community Development

For example, a prospective MBA candidate who wishes to pursue a career in the financial markets doesn't fit within the economic and community development area of focus, even though it relates to finance. But a prospective MBA candidate who wishes to pursue a career in microcredit or with a nongovernmental organization might be a good fit.

If you're uncertain as to the eligibility of a candidate's study programs or career goals, contact the [Future Vision coordinator](#) for your district before you submit the proposal.

Specific eligibility requirements and conditions for global grants include:

- The candidate must be proficient in the native language of the host country (please contact your global grant coordinator for exceptions).
- The candidate's program of study must be at the graduate level.
- The scholar must be traveling abroad for study.
- The scholarship is for a term of one to four academic years.
- The minimum grant amount is US\$30,000. If the grant is funding a scholarship exclusively, this means that the scholarship amount is at least \$30,000. (If the grant is also funding a humanitarian project, the scholarship portion could be less, but the overall grant budget must be at least \$30,000.)

- Scholars need to live in their host district.
- Global grants follow a two-step application process: a proposal followed within six months by an application. The candidate must be admitted to his/her study program by the time of the application, but not at the time of the proposal.
- At the time of the proposal, the candidate must know where he/she wants to study and the sponsors must identify the name of a primary contact in the host district.
- Scholarships may not be used for studies that are already underway.

In global grants, ambassadorial skills are optional for scholars. The primary consideration is forging a link between Rotary and future skilled professionals within an area of focus. That said, global grant scholars are expected to participate in Rotary activities, and their Rotarian sponsors should provide opportunities for them to do so.

With this in mind, here are some optional qualities that clubs and districts might consider when sponsoring a candidate. The candidate should be someone who:

- Possesses excellent leadership skills and potential
- Has a proven record of success in his/her academic field or vocation
- Has demonstrated a personal commitment to community service
- Has well-defined and realistic goals
- Has concrete ideas as to how he/she will make advances within his/her chosen career field
- Is sincere about maintaining a lifelong relationship with Rotary after the scholarship period

MARKETING

Clubs and districts may certainly publicize scholarship opportunities funded through either district grants or global grants. Because of the specialized nature of global grant studies, Rotarians may wish to work with universities to identify potential global grant scholars (e.g., outstanding graduates of a water engineering program who are seeking funding for graduate school in the same field). Alternatively, universities can alert Rotary clubs to students who have been accepted into their graduate programs that fall within a particular area of focus.

ROLES AND RESPONSIBILITIES

DISTRICT GRANTS

District leadership

District leadership is responsible for administering any scholarships funded by a district grant.

Before the district grant scholar has been selected

- Create a scholarship application. Things to consider when preparing this application include:
- What criteria will your district use to evaluate prospective scholars?

- Is your district interested in funding particular fields of study?
- Is the application open to candidates studying both locally and internationally?
- What is the scholarship award amount? Is it intended to cover tuition, travel, living expenses, etc.?
- Establish a district scholarships committee to review scholarship applications and to communicate with scholars throughout their study.

After the application is approved

- Arrange for scholars to attend a regional orientation, or provide orientation materials and information to scholars individually.
- If the scholar is studying abroad, initiate communication with the district in which the study institution is located to discuss what role, if any, it will play in assisting with the student's trip. This assistance may include:
 - Help with local housing arrangements
 - Assistance with preparation of a budget
 - Transportation to/from the airport and to local Rotary club meetings and events
- Provide the scholar with the International Travel Checklist, which includes suggested best practices for planning a safe, cost-effective trip.

During the scholarship period

- Communicate to the scholar the district's expectations regarding reporting and presentations. Things to consider:
 - Will your district require scholars to submit midyear reports? If so, what format should be used (e.g., e-mail update to scholarship committee, blog or website, paper report)?
 - What information will your district require in the scholar's final report?
 - Are the guidelines for scholars to follow for collecting receipts clear? (The district will need to keep receipts for all expenses of US\$75 and more.)

Future Vision staff

Future Vision coordinators will assist Rotarians with the scholarship process, but do not work directly with the students.

GLOBAL GRANTS

International sponsor

Before the global grant proposal/application is submitted

- Assist the candidate in completing the scholarship application form and preparing for club and district interviews, if necessary.
- Identify any relevant application or other deadlines (e.g., university deposits) the candidate may have.
- Provide the candidate with a copy of the [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#).
- Assist the candidate in creating an award budget as well as a personal one (see Appendix A).

- Contact the district Rotary Foundation chair or governor in the host district for assistance in finding a primary host sponsor and host counselor. Early contact between the host and international sponsor Rotarians can help facilitate the scholar's transition in the host country. (You can find contact information for district and club officers in [Member Access](#).)

After the global grant application is submitted

- Inform the candidate of any requests for additional information from your Future Vision coordinator so you can supply it through Member Access or e-mail.

After the global grant application is approved

- The Foundation provides funds directly to sponsor Rotarians for scholars. Your club or district will need to decide payment details, such as:
 - Do you wish payment to go to the international sponsors or the host sponsors? Consider currency fluctuation when deciding where to send the funding for your scholarship.
 - How many payment installments will be made? (If paying in installments, figure out what you will require of the scholar before making subsequent payments.)
- Clearly communicate payment and reporting schedules to the scholar. Provide the scholar with a copy of the approved budget and communicate expectations about eligible expenses (e.g., groceries, yes; liquor, no).
- Complete the payment process along with the host sponsors online.
- Once the funds have been transferred, send funds to the scholar based on the previously established schedule.
- Arrange for a scholarship orientation in your own district or a neighboring one, or online (see below for more detailed information).
- Arrange visits to Rotary club meetings, district functions, and other Rotary-related events, if desired.
- Consider supplying the scholar with small club banners to exchange while abroad. An adequate supply of business cards with the Rotary emblem would also be helpful.

During the scholarship period

- Maintain regular correspondence with the scholar in order to share news with fellow Rotarians at sponsor club meetings and to enable the award recipient to relate news about the sponsor club to the host club.
- Encourage the scholar to share concerns or problems experienced abroad. An award recipient may sometimes feel uncomfortable involving the host counselor in a sensitive issue and will turn to you as a sympathetic contact back home.
- If the scholarship period is longer than 12 months, collect interim reports from the scholar for submission to TRF and receipts for expenses of US\$75 and more for the club or district's records, per the terms of qualification.

After the scholarship

- If possible, arrange to meet and welcome the award recipient home.
- Help the scholar arrange speaking engagements at clubs in your district. In addition to

giving club members the opportunity to learn about the scholar's experiences, such events help publicize the Foundation.

- Ensure that the scholar submits a final report to you, with applicable receipts.
- Encourage the scholar's participation in any Foundation alumni activities available in the district in which he/she resides after the scholarship term.
- Maintain communication with the scholar and keep track of his/her current address.

Host sponsor

Before the global grant proposal/application is submitted

- Correspond with the applicant and introduce yourself, your family, and your city.
- Assist the scholar in expediting the university admissions process, if necessary.
- Assist in providing reasonable budgetary parameters for living expenses.

After the global grant application is approved

- Assist the scholar in locating appropriate housing, especially if university housing is not available.
- Make arrangements to meet the scholar upon arrival. In your absence, arrange for another Rotarian to meet the scholar.
- If your district or region offers inbound scholar orientations, include the scholar.
- Work with international sponsors to determine a payment plan for the scholar and help complete online payment details, if needed.

During the scholarship period

- Invite the scholar to your weekly club meetings and the district conference.
- Contact your governor to suggest using the district newsletter to publicize the scholar's availability for speaking engagements and to publicize scholar activities.
- Encourage other Rotarians to share in providing home hospitality.
- Be available to provide advice to the scholar; encourage open communication.
- Keep track of the scholar's location to enable the sponsors to contact him/her in the event of a natural disaster or personal crisis.

After the scholarship

- Invite the scholar to make a farewell speech to your club.
- Meet with the scholar to make sure that all necessary closing tasks have been completed (e.g., housing arrangements, bank accounts).
- Discuss the scholar's post-scholarship plans, and obtain updated contact information.
- Remind the scholar that he/she may make his/her own arrangements for personally funded travel at the end of the scholarship for a maximum of four weeks.

ORIENTATION

Global grant scholars are required to participate in an outbound orientation session before departure. District grant scholars need only do this if their sponsor district requires it.

There are several options:

- Regional scholar orientation seminars for Ambassadorial Scholarships
- District-run orientation
- Club-run orientation
- Self-guided online orientation (using TRF presentation)

Regional scholar orientation seminars

There are a number of regional scholar orientation seminars worldwide. As indicated, these have traditionally focused on Ambassadorial Scholars; however, Future Vision supplemental materials are now available to make these orientations relevant to global grant – and district grant – scholars. A list of all regional orientation seminars is regularly updated and accessible on the [RI website](#). If you would like to send a scholar to one of these orientations, contact the organizer listed on the website. For the Future Vision supplemental materials, contact your district's [Future Vision coordinator](#).

District-run orientation

If your district would like to organize its own scholar orientation seminar, contact your district's [Future Vision coordinator](#) for materials. Regional orientation seminar organizers may also be willing to provide feedback and assistance.

Club-run orientation

If a scholar is club-sponsored, the club may hold an individual orientation. The same material should be covered as in a regional or district orientation but it does not need to be as formal or lengthy. Contact your district's [Future Vision coordinator](#) for seminar materials.

Online orientation

The Rotary Foundation has created a [scholar orientation](#) that, when necessary, may be used in place of other orientations. This orientation takes approximately 30 minutes and may be done from home. The presentation includes information on

- The Rotary Foundation, Future Vision, and global grants
- Global grant scholar responsibilities
- Reporting requirements
- Strategies for success
- Sexual harassment and inappropriate behavior

All scholars will be asked to complete the online orientation as part of the predeparture process, and it is included in the global grant scholar acceptance packet.

SEXUAL HARASSMENT AND CRISIS MANAGEMENT

To help provide protection and support to both Rotarians and scholars, the Foundation requires that scholar orientations include a section on sexual harassment, and also maintains a guide on crisis management, available from Future Vision staff. We recommend that you review both the guide and The Rotary Foundation Board of Trustees' policy on sexual abuse and harassment:

7.080. Sexual Abuse and Harassment Prevention

All Rotarians, clubs, and districts are required to follow the statement of conduct for working with youth guidelines established by Rotary International, and the following guidelines adopted by The Rotary Foundation Trustees:

1. TRF has a zero-tolerance policy against sexual abuse and harassment.
2. An independent and thorough investigation must be made into any claims of sexual abuse or harassment.
3. Any person involved in a TRF program against whom an allegation of sexual abuse or harassment is made must be removed from all contact with TRF program participants until the matter is resolved.
4. Any allegation of abuse must be immediately reported to the appropriate law enforcement agency, in accordance with TRF's zero-tolerance policy.
5. The Rotary Code of Policies provides guidelines pertaining to Rotary clubs and their members who are found to be involved with sexual harassment. A non-Rotarian who admits to, is convicted of, or is otherwise found to have engaged in sexual abuse or harassment must be prohibited from working with TRF program participants in a Rotary context.
6. If an investigation into a claim of sexual abuse or harassment is inconclusive, then, for the safety of TRF program participants and the protection of the accused, additional safeguards must be put in place to assure the protection of any TRF program participants with whom the individual may have future conduct. If there are subsequent claims of sexual abuse or harassment, the person shall be permanently prohibited from working with TRF program participants in a Rotary context. Regardless of criminal or civil guilt, the continued presence of the person could be detrimental to the reputation of the organization and could be harmful to TRF program participants. It can also benefit the person in preventing additional accusations from other TRF program participants. A person who is accused but later cleared of charges may apply to be reinstated to participate in TRF programs. Reinstatement is not a right, and no guarantee is made that he or she will be reinstated to his or her former position.
7. The general secretary shall take steps to ensure a Rotary district's compliance with these guidelines should it be determined that a district is not adhering to them. (April 2005 Trustees Mtg., Dec. 118)

REPORTING REQUIREMENTS

DISTRICT GRANTS

Clubs and districts that sponsor scholars through district grants need to retain receipts for all expenses equal to or greater than US\$75 related to the scholarship. These may be needed should there be an audit.

Be sure to make this expectation clear to your scholars, and let them know where in the district to send their receipts.

GLOBAL GRANTS

Because the sponsoring Rotarians are applying for the global grant and will be providing funding directly to the scholars, it is their responsibility to report on the use of those funds.

The scholar is required to send a report to his/her sponsoring Rotarians every 12 months for the duration of the scholarship. If the scholarship period is less than 12 months, the scholar is required to send a final report to his/her sponsoring Rotarians at the end of the scholarship period.

Each [scholar report](#) will provide the following:

- Summary of the studies/research and the relationship to the pertinent area(s) of focus
- Summary of Rotary and community involvement
- Statement of income and expenses, including receipts for any expenses equal to or greater than US\$75

If the scholar is studying in a country where the native language is different from his/her own, he/she should provide the summary sections of the report in both languages so as to accommodate the sponsoring Rotarians in both countries.

Your district may require additional reporting documentation as you see fit. Such documents may include a confirmation of costs form to enable you to track living expenses and spending habits in the host country and to help future students budget appropriately. For an example of a confirmation of costs form, refer to the index of the [Ambassadorial Scholar Handbook](#).

POST-SCHOLARSHIP

It is important for sponsoring Rotarians to keep in mind that although the scholarship period ends, the Rotary-scholar relationship should not. Rotarian sponsors should make sure to get updated contact information from the scholar after the scholarship is complete as well as to invite the scholar to speak about his/her experiences at Rotary club meetings and district conferences.

Being an alumnus of The Rotary Foundation is an honor, but it is also an induction into a global network of contacts who all share the same passion for improving the world. Scholars should send their latest contact information to Alumni Relations at alumni@rotary.org. Staff may feature alumni stories in the *Reconnections* newsletter, invite alumni to the annual convention, and put them in contact with a local active branch of TRF alumni.

Send questions or comments about scholarship funding to futurevision@rotary.org.

APPENDIX - SAMPLE BUDGETARY GUIDELINES

These guidelines are provided as a sample to assist you in preparing a scholarship budget. Your proposed scholar can assist in preparing the budget (researching expenses, etc.) and your club or district may have other requirements which should be reflected.

POST APPROVAL/PRE TRAVEL

- Passport/Visa
 - Eligible: Cost of obtaining a passport and visa
- Inoculations
 - Eligible: Additional cost of the inoculations
 - Not Eligible: Cost of doctor appointment
- Medical Insurance
 - Eligible: Comprehensive international medical insurance (as specified in the [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#)) for the duration of the scholarship
 - Not Eligible: Travel Insurance
- Travel Expenses as specified in the [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#)

DURING STUDY PERIOD

- School Supplies
 - Eligible: Books, workbooks, computer
- Tuition
- Room and Board
- Household Supplies
- Transportation
- Study Related Travel

NOT ELIGIBLE

- Any expenses incurred before the application is approved (application fees, language exam fees, etc.)
- Purchase of:
 - Furniture
 - Automobile
 - Bicycle
- Clothing
- All expenses for spouses and dependents
- Housing expenses in the home country during the scholarship period
- Any taxes owed as a result of receiving the scholarship
- Medical care (including dental care)
- Entertainment

- Personal travel
- Expenses related to Rotary events

Rule of Thumb: most personal and miscellaneous expenses are not covered by the scholarship funding.

Make sure to ask yourself whether there are certain expenses that you think should not be covered by the scholarship (i.e. alcohol) and to communicate this directly to the scholar.