

AVAILABLE ONLINE

# THE FUTURE VISION OF THE ROTARY FOUNDATION

## Future Vision Frequently Asked Questions

### NEW GRANT-MAKING MODEL

#### Why is The Rotary Foundation changing its grant-making model?

The Foundation has made only slight modifications to its programs since its inception in 1917. As we prepare for the next century of service, the Foundation has updated its mission and created a more effective and efficient way to help Rotarians develop diverse projects with greater impact and sustainable outcomes.

#### How will the new model work?

The Foundation will offer two types of grants:

- Rotary Foundation District Grants are block grants made to districts to support smaller projects, both locally and internationally. Districts may use up to 50 percent of their available District Designated Fund (DDF) for these grants in a given Rotary year and administer the grant without the Foundation's involvement.
- Rotary Foundation Global Grants support larger projects with sustainable, high-impact outcomes in one of the six areas of focus. These grants would be administered by the Foundation in a manner similar to the current system.
  - Clubs and districts can create their own global grant projects, which are funded by the sponsors and a matching World Fund award.
  - The Foundation will develop packaged global grants with its strategic partners. The World Fund and the strategic partner provide 100 percent of the funding, and Rotarians implement the grant project.

#### What are the areas of focus for global grants?

There are six areas of focus for Rotary Foundation Global Grants:

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

#### How are organizations selected for strategic partnerships?

The Rotary Foundation will make selections based on the organization's ability to help clubs and districts implement projects in the areas of focus through technical expertise, financial support, and/or advocacy.

#### What is the difference between a strategic partner and a cooperating organization?

Strategic partners are organizations with which The Rotary Foundation has developed packaged global grant projects in the six areas of focus. Club and districts can sponsor these grants in conjunction with the strategic partners. Cooperating organizations are project partners that are identified and approached directly by clubs and districts.

#### Where do educational programs fit into the new model?

The Rotary Centers for International Studies program — and the US\$95 million major gifts initiative to permanently fund Rotary World Peace Fellowships — will not change. Activities in this program clearly support the peace and conflict prevention/resolution area of focus.



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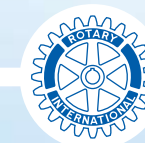
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Eligible activities currently supported through the Foundation's other educational programs, such as Group Study Exchange teams and Ambassadorial Scholars, will exist under both grant types. If the GSE team members' vocation or a scholar's academic field relates to an area of focus, the activity may be eligible for a Rotary Foundation Global Grant. Districts can use Rotary Foundation District Grants to support educational activities that don't fall within the areas of focus.

#### [How will the new model affect PolioPlus?](#)

As Rotary International's corporate program, PolioPlus is the organization's top priority and will continue to operate as usual until polio is eradicated.

#### [Will the new model continue to support activities currently covered by Volunteer Service Grants?](#)

**Yes.** Individuals will be able to participate in these kinds of activities with funding from Rotary Foundation District Grants.

#### [Will the World Fund continue to support smaller projects?](#)

The Trustees established a minimum award amount of US\$15,000 for global grants. Smaller projects can be funded through the district grants. Clubs and districts are encouraged to work together to implement larger projects that meet the minimum award amount and will have a more long-term and sustainable impact on the community.

#### [Will the Foundation continue to match club and district financial contributions?](#)

**Yes.** Global grants will offer a 100 percent World Fund match to DDF and a 50 percent World Fund match to "flow-through" cash contributions (cash gifts made to the Foundation but not through the Annual Programs Fund).

## FUTURE VISION PILOT PARTICIPATION

#### [When can my district apply to participate in the Future Vision Pilot?](#)

The Foundation will accept online applications from late January to 15 May 2009. Check [www.rotary.org/futurevision](http://www.rotary.org/futurevision) for updates on the pilot.

#### [When will the pilot begin?](#)

The three-year pilot will begin on 1 July 2010.

#### [How will a pilot district appoint its Rotary Foundation committee chair, considering the three-year term for this role?](#)

Pilot districts will be required to have the same district Rotary Foundation committee chair for all three years of the pilot phase in order to maximize the effects of training and maintain

consistency. For the duration of the pilot phase, districts may appoint a new Rotarian or the same Rotarian who is serving as district Rotary Foundation committee chair the year before the start of the pilot.

#### [How are pilot districts selected?](#)

The Foundation will select a representative group of districts in terms of size, location, level of Foundation activity, and effectiveness in stewardship, grant reporting, and other district operations.

#### [When will I find out whether my district is selected?](#)

A notification about the selections will be sent on 1 June 2009 to all districts that apply.

#### [Will pilot districts receive any training?](#)

**Yes.** Training for pilot districts will be incorporated into Rotary's standard training cycle. All pilot district governors-elect and district Rotary Foundation committee chairs must attend a centralized training session in early calendar year 2010 at the Foundation's expense. As part of the training, each district will receive information about how to become qualified to receive grant funding.

#### [Can clubs apply to participate in the pilot?](#)

**No.** Only districts can submit an application. However, the district must have the approval of two-thirds of its member clubs before applying to participate.

#### [How can my club or district fund an activity outside the areas of focus?](#)

Eligible activities that don't fall into one of the areas of focus can be funded through a Rotary Foundation District Grant.

#### [Can clubs in pilot districts submit applications for current Foundation programs?](#)

**No.** All pilot districts and their clubs must be fully committed to the new grant structure and cannot participate in Matching Grants or any other current program, with the exception of PolioPlus and Rotary Centers for International Studies.

#### [Can clubs in pilot districts use district or global grants to partner with clubs in nonpilot districts?](#)

District grant funds can be used within the district or to support projects in other pilot or nonpilot districts. Global grant use is restricted to pilot clubs and districts only.

#### [Can pilot clubs and districts partner with non-strategic-partnership organizations?](#)

**Yes.** Clubs and districts are encouraged to continue developing cooperative relationships with local organizations to implement

district grant projects and club- and district-developed global grants.

#### [What if my district has open grants when the pilot begins?](#)

Foundation staff will help your district meet all reporting requirements of the current grants so that the grants can be closed out successfully.

#### [If my district isn't selected, can we reapply the following year?](#)

**No.** The pilot application and selection process is one time only. No districts will be added to the pilot after it has begun. Both pilot and nonpilot districts will be encouraged to begin supporting grant activities that relate to the areas of focus.

#### [How will my district be affected if we don't participate in the pilot?](#)

Nonpilot districts will continue to operate under the current grant structure until the new grant model is implemented globally in 2013-14. However, some current Foundation programs and grant types will be phased out before 2013-14 to free up resources needed for the transition to the new model. The 2010-11 Rotary year will be the last year that the Foundation will issue funds for

- Multi-Year Ambassadorial Scholarships
- Cultural Ambassadorial Scholarships
- Rotary Grants for University Teachers
- Health, Hunger and Humanity (3-H) Grants
- Volunteer Service Grants
- Disaster Recovery Grants

Districts not selected for the pilot will be updated on its progress and begin training on the new grant-making model in 2012-13 to make the transition in July 2013.

## RECOGNITION PROGRAMS

#### [What changes are being made to the Foundation recognition programs?](#)

- Paul Harris Fellow medallions will not be provided automatically but will be available for purchase.
- The individual donor will be the only person authorized to transfer Foundation recognition points.
- Foundation recognition points will expire upon the death of the donor or the death of the surviving spouse of a Major Donor (US\$10,000+).
- Foundation recognition points and recognition amounts will only be transferred for transactions of 500 points or more.
- New wearable recognition will be issued to Arch C. Klumph Society members.

#### [When will changes to the recognition process take effect?](#)

The new policies take effect 1 July 2009.

#### [When will the new wearable recognition be available?](#)

The Arch C. Klumph Society pins should be available in December.

#### [Why are these changes being made?](#)

It has long been the wish of The Rotary Foundation Trustees to simplify the Foundation's programs and allow more resources to meet donors' expectations. The Future Vision Plan and these changes are intended to simplify the recognition program and, therefore, make the Foundation a more efficient, timely, and cost-effective steward of the gifts of many Rotarian and non-Rotarian donors.

#### [Will club presidents still be able to transfer Foundation recognition points from members' IDs?](#)

Historically, Rotary club presidents have been allowed to authorize transfers of Foundation recognition points from the IDs of current and former members of their club. Once this change is implemented, only the individual donor may transfer Foundation recognition points from their ID.

#### [What does it mean that Foundation recognition points expire upon the death of the donor or the death of the surviving spouse of a Major Donor?](#)

Because only the donor will be authorized to transfer Foundation recognition points, any remaining points will expire after the donor's death. A surviving spouse of a Major Donor, however, may still authorize transfers on the donor's behalf.

#### [What does the new 500 point threshold for transfers mean?](#)

Though individuals, clubs, and districts may still transfer Foundation recognition points to name new Paul Harris Fellows and present further Paul Harris recognition awards, the minimum transfer from an account will be 500 points. Transfer requests of less than 500 points, or Paul Harris Fellow recognition amounts, would not be processed.

#### [What does it mean that Paul Harris Fellow medallions are available for purchase?](#)

The standard recognition materials will no longer include the current Paul Harris Fellow medallions. This item is optional and will be shipped only by special order. Recognition practices will be assessed on an ongoing basis to ensure the goals of the organization are achieved.