



The Rotary Foundation's Future Vision Plan

**Preparing for the Foundation's
Second Century of Service**

2/15/2009



Why the Future Vision Plan?

- Immense growth,
- Rotarian feedback,
- More significant, sustainable outcomes,
- Greater coordination and relevance
- To become the partner of choice in philanthropic world



TRF Motto & Mission

Doing Good in the World

...To enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty

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Saving & changing lives is what our Foundation does!



Six Areas of Focus

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

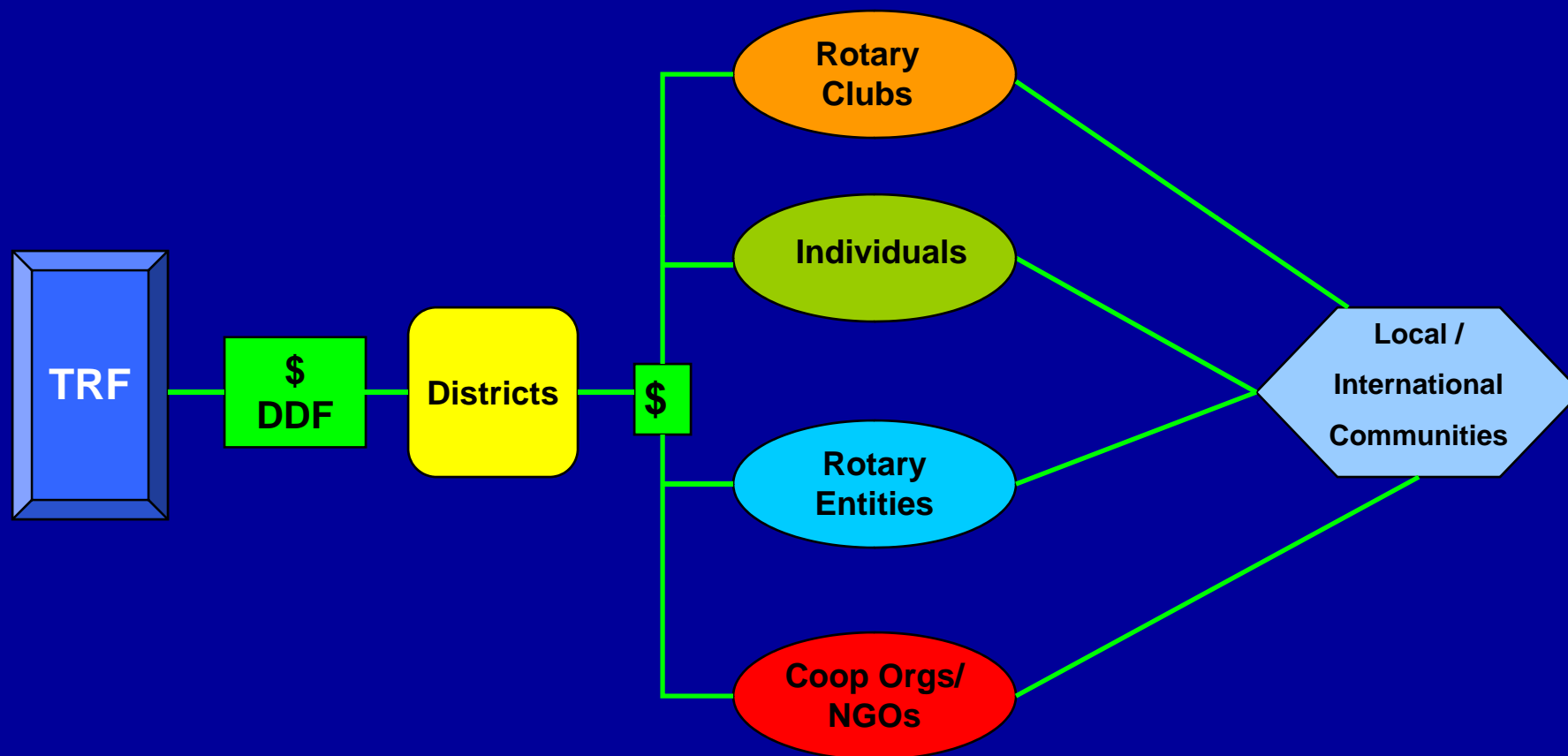


Two Types of Grants

- A. Rotary Foundation District Grants
- B. Rotary Foundation Global Grants



District Grants





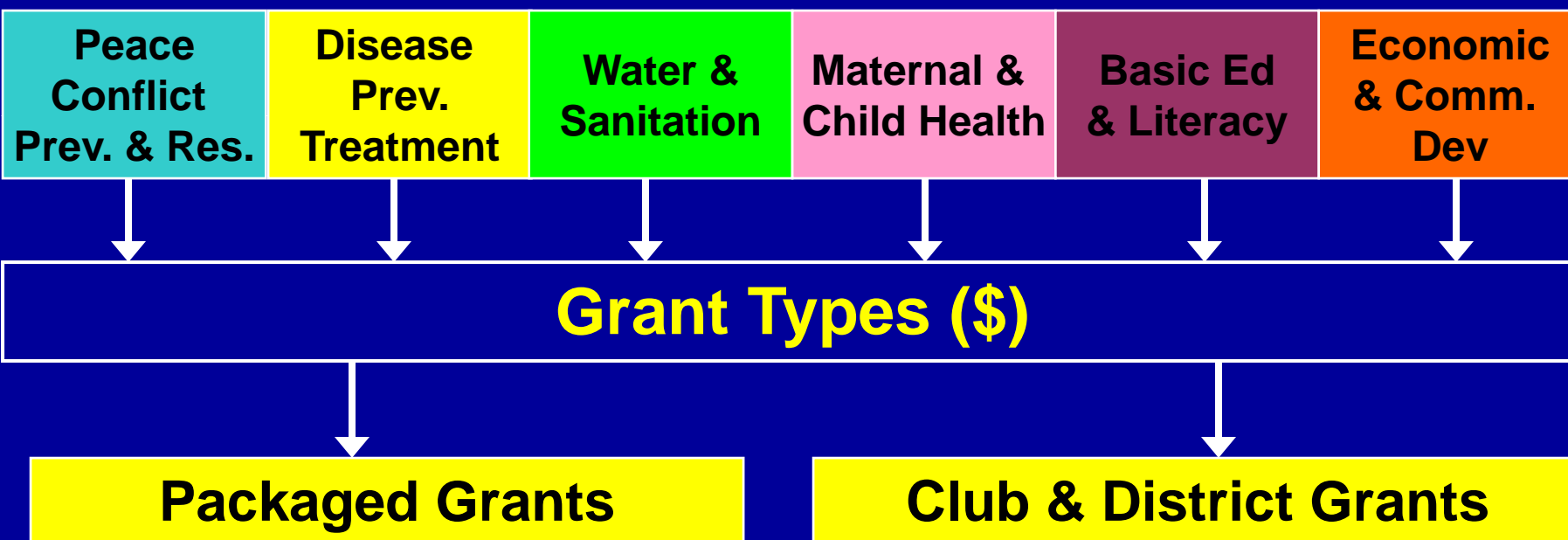
District Grants

- Projects Mission related, flexible and innovative
- Educational and humanitarian projects or activities that support the mission of TRF
- Smaller activities and projects
- Local decision making, broader guidelines
- Follow District rules consistent with TRF guidelines
- District & Club stewardship



Global Grants

Areas of Focus





Global Grants

- Educational and humanitarian purposes consistent with the six areas of focus
- Sustainable outcomes with long term impact
- Must meet specific standards
- Require Rotarian participation
- Require host & international partners
- Larger grant awards (minimum \$15,000 World Fund grant)



Strategic Partnership Model

RI/Rotary Foundation

Foundation Areas of Focus
Global Grants

Districts/Clubs
*Financial and/or
Human Resources*

Strategic Partnerships

Financial Resources

- Direct to Foundation
- Parallel funding
- Foundation gives to partner

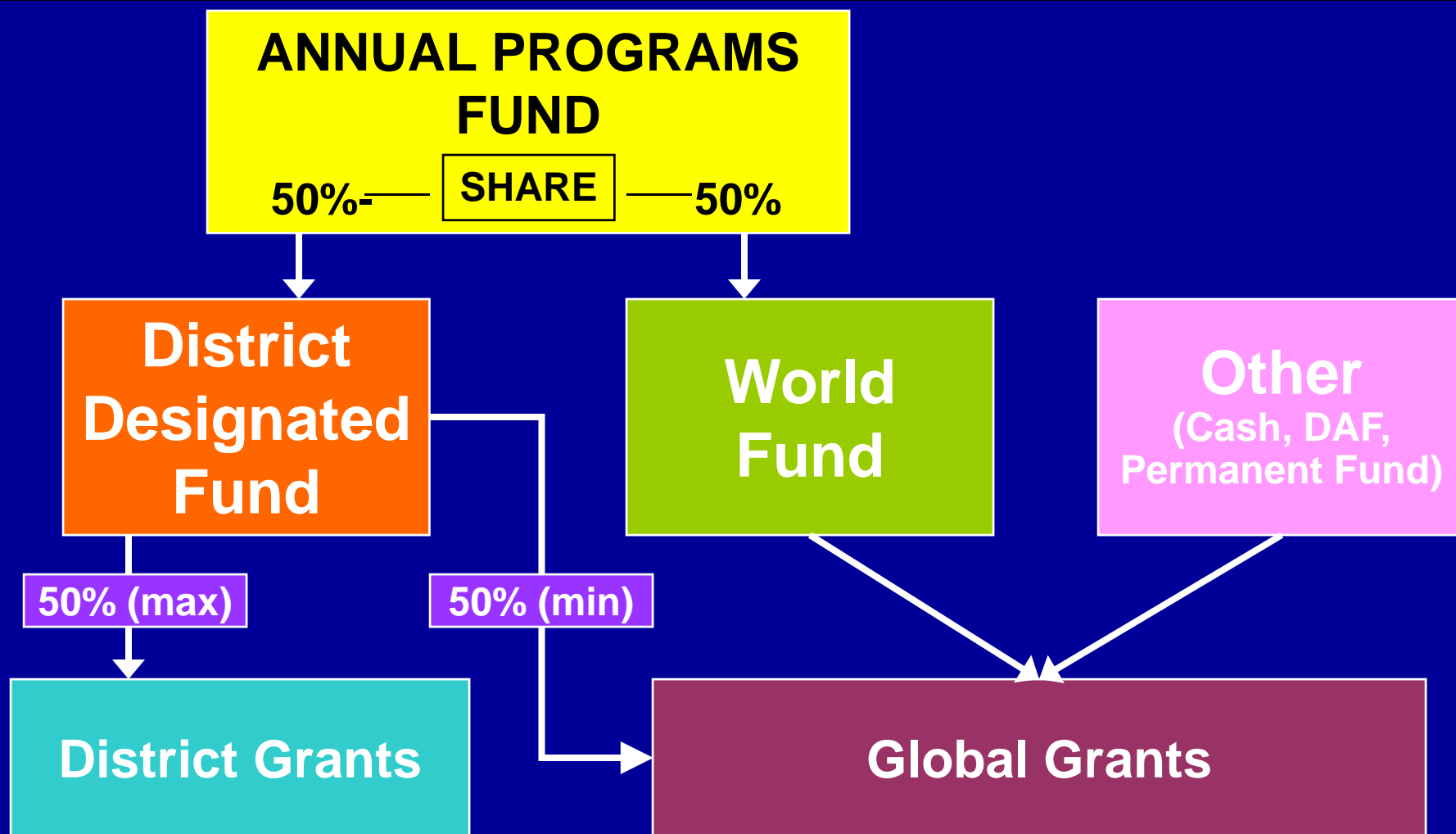
Technical Expertise

Advocacy

Community

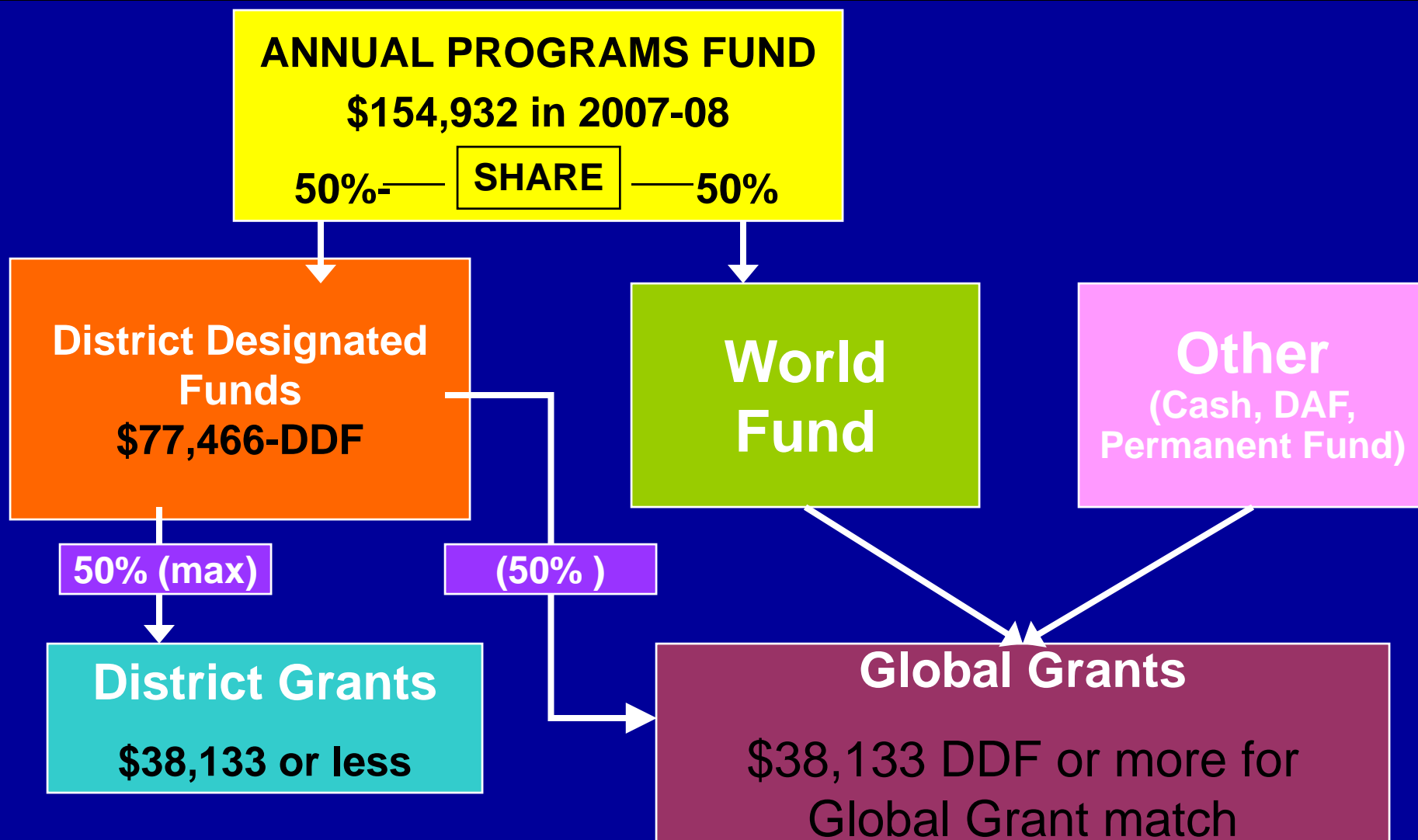


Distributable Funds





Distributable Funds





Transition Plan Summary by Current Program

District Grants

Activities currently funded by:

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

Global Grants

Activities currently funded by:

- Academic-Year Ambassadorial Scholarships
- Group Study Exchange
- Larger Matching Grants
- 3-H Grants
- Rotary Centers for International Studies



Examples of Activity

District Grants

- Exchange of mixed business & profession vocational training teams with another district
- International travel for local doctor to volunteer at a clinic
- Scholarship for student to attend local university for one semester
- Donation of art supplies to assist local youth after-school program
- *Shelterbox* containers sent in response to natural disaster in another district

Global Grants

- International safe drinking water, sanitation, and hygiene education project
- Sponsorship of *Rotary Scholar* to study abroad in a water environmental engineering master's degree program
- International malaria project to distribute bed nets and malaria treatment in conjunction with area hospital
- *Rotary Vocational Training Team* sent abroad to participate in 8-week workshop to learn teaching methods to address adult literacy



Funding Attributes

District Grants

- Block grant
- District administers
- Follow TRF guidelines
- TRF Mission Driven
- Creativity and accountability
- Local and DDF funding only
- Up to 50% eligible DDF
- District Stewardship

Global Grants

- DDF, World Fund, cash, carryover flow through, PF earnings, named gifts
- Six areas of focus
- Larger awards (minimum \$15K) and total project costs
- WF match of DDF, cash, and District Advisory Funds
- Streamlined stewardship and accountability



Timeline

2008-09
2009-10

- Communicate and promote to Rotary world
- Select, train & qualify up to 100 pilot districts
- Educate DGEs, DRFCs, RRFCs on new grant model

Planning & Preparation

2010-11

- Begin awarding grants to pilot districts
- Update on pilot to Trustees

1

yr

2011-12

- Continue awarding grants to pilot districts
- Evaluation reported to Trustees
- Final pilot evaluation to Trustees
- Phase out some current programs

yr

2012-13

- Continue awarding grants to pilot districts
- Final pilot evaluation
- Adjust grant model
- Qualify and train all districts

yr

2013-14

- Begin awarding new grants worldwide
- Phase out remaining programs

full rollout



Pilot Application & Training

- All districts worldwide invited to apply
- District application process complete May 2009
- Online process
- Agreement of DG, DGE, DGN, DRFC
- Agreement of $\frac{2}{3}$ clubs in districts
- Training within 2009-10 RI training cycle
- Involves DGE, DRFC, RRFC



Selecting Pilot Districts

- Diverse cross-section
- Diverse grant activity (small and large)
- Reporting and stewardship practices
- No election / appointment disputes
- Effective committees
- No probation / suspension



Phase Out Plan

- Operate two grants structures in parallel during pilot
- Six current award types available for last time worldwide in 2010-11
- Remaining old grant types available for last time in 2012-13
- Pilot districts close out old grants by end of 2013-14, first year of new structure globally
- Non-pilot districts close out old grants by end of 2018-19, six years later.



Pilot District Challenges

Challenges for Pilot Districts:

- **Agree to 3-year commitment**
- **Need for flexibility as rules are defined & issues surface**
- **Limited ability to work with those Districts that are not Pilot Districts**
- **Must end Traditional GSE and Ambassadorial Scholarship Programs two years earlier than those Districts that are not Pilot Districts**
- **“Super-user” districts may have less access to funds for some international grant activities**



Key Changes - Grants

- Two types of Grants: District Grants & Global Grants
- More money available for funding District Grants (up to 50% of DDF instead of 20% of DDF) but no WF match is available
- Minimum Matching Grant Funding from World Fund \$15,000 (Through Global Grants) \$1 from WF for each \$1 of DDF and 50 cents from WF for each \$1 cash



Key Changes - Grants

- Typical Global Grant might be a mix of DDF and Cash-perhaps:

\$ 7,500 DDF yielding \$7,500 WF match
15,000 Cash yielding \$7,500 WF match
15,000 World Fund Match
\$37,500 Total Project

- Clubs will need to work together to raise more cash, perhaps even with the help of local cooperating organizations and non-Rotarians



Key Changes - Grants

- Longer range planning for Global Grants will be encouraged and should provide more sustainable, meaningful long range results and follow through
- Longer term projects and relationships will likely result



Key Changes - Grants

- Packaged Global Grants will be available to make it easier for Districts with international partners to tackle problems in the six areas of focus either here at home or overseas

Strategic partners may provide:

- pre-packaged programs,
- resources,
- and perhaps even cash



Key Changes-GSE

- Group Study Exchange Teams will be combined with the concept of Volunteer Service Grants to become “Vocational Training Teams” teaching or learning in the six areas of focus when funded by Global Grants
- No 25 – 40 age limit
- Teams determine length of stay based on purpose
- Minimum cost as Global Grant \$30,000 (with \$15,000 DDF and \$15,000 World Fund or a mix of DDF, cash and Global Grant Funds)
- Smaller projects may be funded by District Grant without world fund match



Key Changes: Scholarships

- Global Grants can fund scholarships to study in the six areas of focus
- Minimum scholarship with Global Grant - \$30,000 (\$15,000 DDF and \$15,000 World Fund or a mix of DDF, cash and Global Grant Funds)
- District can fund scholarships of any size from District Grant funds to study where they choose, even in District, provided they further purpose of TRF (no match available from world fund)



Advise for All Districts

Whether or not you choose to be a Pilot District:

- Begin now to focus your GSE, Scholarships and Matching Grant programs on the six areas of service where ever possible
- Encourage Clubs to work together on their international service projects
- Identify those organizations, institutions, colleges and universities in our Districts that focus on the six areas of focus and determine how they might work with Rotary Vocational Training Teams, Scholars and projects as host organizations



Transition Rules

For Districts applying to be Pilot Districts:

- Scholarship candidates should not be submitted to TRF until Districts it is known if they will be a pilot District (June 1, 2009); Scholars recruited during 2008-09 will have to be funded by Pilot Districts from available District Grant Funds in 2010-11 unless they qualify to study in one of the six areas of focus under a Global Grant.
- Pilot Districts will need to plan to organize and recruit Vocational Training Teams focused on the six areas of focus not Traditional Group Study Teams if they are to be funded with a Global Grant. Global Grants will fund Vocational Training Teams with TRF support. Mixed business and professional teams that operate like Traditional GSE Teams can be funded by District Grants but will not be supported by TRF staff.



Transition Rules

- Pilot Districts working with each other may use Global Grants to carry out humanitarian projects or sponsor Vocational Training Teams & Scholars who are working or studying in one of the six areas of Focus
- Non Pilot Districts may work together using current Foundation Grants Types, some of which may be phased out before the end of the Pilot District Program



Transition Rules

- Pilot & Non Pilot Districts may continue to work together during the three year pilot period provided they follow the specific guidelines established by TRF
- Pilot Districts may sponsor Scholars to study in Non Pilot District using District Grants
- Non Pilot Districts may send Ambassadorial Scholars to Districts world wide



Transition Rules

- Pilot Districts may use District Grants to fund & send a Vocational Training Team to Non Pilot Districts and the Pilot District may determine the number and professional composition of the team.
- Non Pilot Districts may send a GSE Team to Pilot Districts under the current program



Transition Rules

- Pilot Districts may use District Grants to support humanitarian projects with non pilot Districts
- Remember Pilot districts are to close out old grants by end of 2013-14, first year of new structure globally
- Non Pilot Districts may use District Simplified Grants for projects with Pilot Districts



Why be a Pilot District?

- Far Better support in learning how to maximize the use of Funds under the new system
- Far better support in learning the benefits for Rotarians, Clubs and Districts available from the new Foundation Programs



Why be a Pilot District?

- As a pilot district you will have an opportunity to suggest changes that can improve the new Foundation grant types
- Your District will be better prepared for the 2013-14 Rotary Year when all Districts will be bound by the new Foundation rules



Why be a Pilot District?

- More Funds will be available from the District for small Club humanitarian and educational projects under the new District Grants
- You will be able to pursue bigger, more effective and more meaningful humanitarian and educational grants here at home and overseas using the new Global Grants



Why be a Pilot District?

- Rotarians with international partners should be better able to tackle serious issues here at home or overseas using the larger Global Grants available that should provide more sustainable, meaningful coordinated outcomes in the six areas of focus
- Minimum Matching Grant funding from World Fund is \$15,000 (Global Grants: \$1 for \$1 DDF and 50 cents for each \$1 cash)
- Typical Global Grant Project likely to be \$30,000 or \$37,500



Why be a Pilot District?

- Provides Rotary Clubs an opportunity to partner with TRF's new strategic Partners for support, resources and even funds
- Packaged Grants will be available that will make it easier for Rotarians, Clubs and Districts to implement meaningful projects in the six areas of focus



Why be a Pilot District?

- You will be able to grant Scholarships to students from your district to study either in your District or overseas in amounts your District sets based on available District Grant Funds
- Scholarships funded by Global Grants to study in the six areas of focus will cost the District only \$15,000 in DDF for a \$30,000 grant if no club match is required



Why be a Pilot District?

- Vocational Training Teams (formally known as GSE Teams) can be for shorter or longer times than 6 weeks and will no longer have a 25-40 age limit
- Vocational Training Teams will travel for specific purposes in support of the six areas of focus to train or use vocational service skills and will yield more meaningful vocational experiences



Why be a Pilot District?

- Vocational Training Teams can be funded through Global Grants to study or provide needed vocational services in the six areas of focus
- Minimum world fund match - \$15,000 if matched by \$15,000 DDF or by a combination of DDF and cash
- Vocational Training Teams may be funded by District Grant Funds, to support TRF goals but no world fund match is available



Why be a Pilot District?

- Pilot districts can continue to fund volunteers with needed skills to work on projects through District Grants and Vocational Training Teams
- Provides increased opportunity for meaningful partnerships with strategic partners, social service agencies, colleges, religious organizations, and community volunteers



Questions?

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