

# FUTURE VISION PLAN

## Starter Guide



### Table of Contents

Introduction.....2

Timelines .....3

Goal Setting.....6

Qualification.....8

Rotary Foundation District Grants .....9

Rotary Foundation Global Grants .....10

Resources .....12

## INTRODUCTION

Congratulations on being selected as a pilot district for The Rotary Foundation's Future Vision Plan. Your participation will be an essential element in creating a strong, efficient Foundation for the future.

Over the coming months, you will receive information to help you learn more about the new grant-making model and your role as a pilot district. Foundation staff will also be available to answer any specific questions you may have. Your experience in testing the new model will help the Foundation evaluate the overall effectiveness of the plan and make adjustments as needed. For that reason, training of pilot districts is an essential part of the process.

This starter guide is designed to begin your training. Beginning on page 3, you'll find a timeline telling you what communications materials and training you can expect from the Foundation in the coming months. It also lists what your district is expected to do at various points throughout this training year. Among the resources that the Foundation will provide is a monthly e-mail newsletter that will address pilot districts' questions and report decisions by the Foundation Trustees that could affect the pilot.

The best communication works in many directions. The Foundation wants to hear your questions and learn about your experiences as you prepare to put the plan into action. Providing feedback is a critical responsibility of pilot districts because it will ensure that the new model is practical and effective when it is rolled out to the entire Rotary world in 2013-14.

It's also important for pilot districts to share ideas and concerns with each other and to develop grant partnerships. A [Future Vision pilot group](#) has been established on [LinkedIn](#), a social networking site that facilitates communication among group members.

The 2009-10 RI theme, *The Future of Rotary Is in Your Hands*, is especially applicable for pilot districts. The future of The Rotary Foundation will be more secure with an effective grant-making model in place. Your full participation in the pilot and your insightful feedback will ensure that the Foundation continues to be a vital resource for Rotary clubs and districts Doing Good in the World.

## TIMELINES

Throughout 2009-10, pilot districts will receive a wealth of information from the Foundation by e-mail and on [www.rotary.org](http://www.rotary.org). In addition, training will be provided to district governors-elect at governors-elect training seminar (GETS), along with other district leaders if possible. District governors-elect and district Rotary Foundation chairs will receive training at the Future Vision Pilot Training in San Diego in January. The district leadership team will then provide training to club leaders at the presidents-elect training seminar (PETS), district assembly, and the district conference. The following chart provides a timeline for carrying out each of the specific responsibilities.

Date	Pilot District Responsibilities
June 2009	<ul style="list-style-type: none"> <li>• Review welcome packet sent by Foundation.</li> </ul>
July 2009	<ul style="list-style-type: none"> <li>• District governors 2010-13 will work together to appoint a district Rotary Foundation committee chair and notify the Foundation by 1 August.</li> <li>• District governor-elect and incoming district Rotary Foundation committee chair begin process of forming subcommittees based on the new recommended structure and the needs of their district; resources will be highlighted in the monthly newsletter from the Foundation.</li> </ul>
August 2009	<ul style="list-style-type: none"> <li>• District team begins working together to set goals.</li> <li>• District team becomes familiar with qualification requirements; tools and resources will be highlighted in the newsletter.</li> <li>• District governor-elect and incoming district Rotary Foundation committee chair prepare for International Assembly.</li> <li>• District leaders attend GETS, where the regional Rotary Foundation coordinator (RRFC) will provide a session for pilot districts.</li> </ul>
September 2009	<ul style="list-style-type: none"> <li>• District becomes familiar with the areas of focus; information will be provided in the newsletter.</li> <li>• District leaders attend GETS, where the RRFC will provide a session for pilot districts.</li> </ul>

Date	Pilot District Responsibilities
October 2009	<ul style="list-style-type: none"> <li>• District begins to determine how current grant activity fits in the new model.</li> <li>• After becoming familiar with information on district grants provided by the Foundation, district begins to develop a process for managing district grants and a club-level application form.</li> <li>• District leaders attend GETS, where the RRFC will provide a session for pilot districts.</li> </ul>
November 2009	<ul style="list-style-type: none"> <li>• District team provides specialized training to club leaders on Future Vision during district Rotary Foundation seminar. (Note: this seminar may be held as early as August.)</li> <li>• District becomes familiar with information on club- and district-developed global grants provided by the Foundation.</li> <li>• District leaders attend GETS, where the RRFC will provide a session for pilot districts.</li> </ul>
December 2009	<ul style="list-style-type: none"> <li>• District becomes familiar with information on packaged global grants provided by the Foundation.</li> <li>• District leaders attend GETS where the RRFC will provide a session for pilot districts.</li> </ul>
January 2010	<ul style="list-style-type: none"> <li>• District governor-elect and incoming district Rotary Foundation committee chair participate in Future Vision Pilot Training 17-18 January in San Diego.</li> <li>• District continues to fulfill district-level qualification requirements.</li> <li>• District receives <i>Grant Management Seminar Leader's Guide</i> to assist in qualifying clubs.</li> </ul>
February 2010	<ul style="list-style-type: none"> <li>• District team begins training incoming club officers (at PETS, district assembly, and district conference).</li> <li>• District receives detailed information from the Foundation on applying for district grants, finalizes its district grant process and sends application to clubs.</li> </ul>
March 2010	<ul style="list-style-type: none"> <li>• District team provides training for club presidents-elect during PETS.</li> <li>• District begins qualifying clubs.</li> <li>• District receives detailed information on applying for global grants.</li> </ul>

Date	Pilot District Responsibilities
April-June 2010	<ul style="list-style-type: none"> <li>• District team provides training for incoming club officers during district assembly.</li> <li>• District continues qualifying clubs.</li> <li>• District finalizes plans for distribution of district grant funds and submits district grant application to the Foundation.</li> <li>• Clubs and/or district submit global grant applications to the Foundation.</li> </ul>
July 2010	<ul style="list-style-type: none"> <li>• District begins to receive district and global grants and implement projects. Districts are no longer eligible to receive awards from current Foundation programs.</li> </ul>
2010-13	<ul style="list-style-type: none"> <li>• Districts participate in district grants and global grants and finish closing out all remaining Foundation grants from the current structure.</li> </ul>

## GOAL SETTING

Establishing goals, an essential step for all Rotary districts, is even more important for Future Vision pilot districts. Such a major change in the way your district operates requires that all key members of the district leadership team understand the new grant-making model and how your district can benefit from it.

As with any goal-setting exercise, districts should begin by assessing their strengths and weaknesses, especially in relation to their past experience with The Rotary Foundation. For example, if your district has carried out many successful Matching Grant projects, consider how you can use that experience in developing global grants or using district grants to support an international project.

In setting goals, keep in mind that effective goals are

**Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it.

**Measurable.** A goal should provide a tangible point to pursue.

**Challenging.** A goal should be ambitious enough to go beyond what the district has accomplished in the past.

**Achievable.** Rotarians should be able to accomplish the goal with the resources available.

**Time specific.** A goal should have a deadline or timeline.

After establishing your goals, use the following steps to develop an action plan to achieve them:

- Consider the resources and tools available to support the goal.
- Outline the specific steps needed to achieve the goal, establish a time frame for each step, and determine who is responsible for implementation.
- Identify the criteria for measuring achievement.
- Monitor progress toward the goal.
- Evaluate the success of previous goals and their action plans, and incorporate lessons learned into your current plan.

Consider the requirements of the Future Vision plan as you develop your goals for 2009-10. In addition to the traditional goals of educating Rotarians and raising funds for the Annual Programs Fund, the Permanent Fund, and Rotary's US\$200 Million Challenge, pilot districts should establish the following goals:

- Adopt the recommended district leadership structure for pilot districts, making necessary adjustments based on the needs and activities of your district.

- Fulfill the district qualification requirements.
- Follow the procedure for qualifying clubs, including conducting a district Rotary Foundation grant management seminar.
- Establish policies for district grants and create a club-level application form.
- Seek input from clubs and determine distribution of the District Designated Fund (DDF) for district and global grants.
- Develop project plans for 2010-11, and apply for district and global grants.

When setting goals, keep in mind that PolioPlus and the Rotary Centers for International Studies in peace and conflict resolution remain the same under Future Vision and should continue to be part of the district's activities. Pilot districts are also expected to continue to hold an annual district Rotary Foundation seminar.

## QUALIFICATION

Qualification is the process of ensuring that Rotary districts and their member clubs have the appropriate financial, legal, and stewardship controls in place to manage Foundation grants during the Future Vision pilot. Districts must be qualified to receive Rotary Foundation Global Grants and Rotary Foundation District Grants. Once this status has been achieved, the district will remain qualified until the end of the Future Vision pilot in 2013.

In order to become qualified, each pilot district must read and agree to a [memorandum of understanding \(MOU\)](#) detailing the measures that the district must implement to ensure transparency and proper financial management of Foundation grant funds. Districts must also submit the following information to the Foundation:

- Payee information for a district bank account established to receive grant funds
- Information regarding which method the district will use to conduct annual financial assessment of the management of Foundation grant funds
- Authorization and acceptance of the terms of qualification in the MOU

Once qualified, your district must qualify your member clubs that want to sponsor global grants. Although clubs are not required to undergo qualification to receive funds from a district grant, districts are strongly encouraged to qualify every club that wants to participate in Foundation programs. To achieve qualification, clubs must attend a district Rotary Foundation grant management seminar, read and agree to a club MOU, and comply with any additional requirements mandated by the district.

Tools and resources on qualification will be available in August 2009. Districts that complete all qualification requirements before 31 March 2010, will be able to apply for grants beginning 1 April 2010. Districts and their clubs cannot apply for Rotary Foundation grants until they become qualified.

## **ROTARY FOUNDATION DISTRICT GRANTS**

District grants are block grants made to districts to support smaller, short-term projects sponsored by Rotarians. District grants offer districts the flexibility to respond quickly to immediate needs within their local communities or to plan projects that may or may not fall within one of the areas of focus.

Districts may request up to 50 percent of their available [District Designated Fund \(DDF\)](#) in a given year to support district grant projects. Districts will administer district grants projects with minimal direct oversight by The Rotary Foundation, provided the activities adhere to the [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#).

Districts may receive one district grant per Rotary year. Districts are encouraged to submit applications during the planning year for immediate payment at the start of the implementation year. Applications may be submitted during either year, however, and will be accepted throughout the year.

District grants can be used for a wide variety of activities including, but not limited to, funding scholarships, supporting vocational teams, sponsoring volunteer service, providing disaster relief, and carrying out community and international service projects. Districts may use district grants to partner with other Rotary clubs locally and abroad and in either pilot or nonpilot districts.

## ROTARY FOUNDATION GLOBAL GRANTS

Global grants support larger projects with sustainable, high-impact outcomes in one of the six areas of focus:

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

There are two types of global grants:

- Club- and district-developed grants are designed by Rotarians and funded by the sponsors and a matching Foundation World Fund award.
- Packaged grants are developed by the Foundation and, in most cases, a strategic partner organization with expertise in the area of focus being addressed and implemented by Rotarians.

## CLUB- AND DISTRICT-DEVELOPED GLOBAL GRANTS

Before formally applying for a global grant, clubs and districts must submit a brief proposal to determine if the activity is eligible and fits within an area of focus. Once the proposal is reviewed and accepted by the Foundation, the sponsors will be invited to submit a full application. This process is designed to increase the acceptance rate of grant applications. Proposals and applications will be accepted throughout the year.

Grant awards range from US\$15,000 to \$200,000. Cash contributions are matched at 50 percent, while DDF contributions are matched at 100 percent.

Club- and district-developed grants offer an opportunity to design larger projects with sustainable, measurable outcomes. They may be used to implement humanitarian projects, organize vocational training teams, and award scholarships within the six areas of focus. See the [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#) for more details.

## PACKAGED GLOBAL GRANTS

Packaged global grants will be developed by the Foundation and, in most cases, a strategic partner organization for implementation by Rotary clubs and districts. The World Fund and the strategic partner will provide 100 percent of the funding. Strategic partners are organizations that have demonstrated expertise in one or more of the areas of focus. They will provide financial, technical, and/or advocacy resources for packaged grant projects.

As packaged grants become available, a detailed description of the projects and the necessary Rotarian involvement will be posted on [www.rotary.org](http://www.rotary.org). Clubs and districts can evaluate how the packages fit with their resources and interests and apply online.

## RESOURCES

The RI Web site at [www.rotary.org](http://www.rotary.org) will be your best resource on the Future Vision pilot. Every month, all pilot district governors and district Rotary Foundation chairs will receive an e-mail newsletter that addresses various issues related to the pilot, provides links to new information on the Web site, and answers frequently asked questions from pilot districts.

In addition, Foundation staff members are available to answer your questions. The staff sheet attached to the welcome e-mail lists Future Vision staff member names and contact information.

To provide general feedback about pilot communications materials and training, write to [futurevision@rotary.org](mailto:futurevision@rotary.org).

To communicate with other pilot districts in the [Future Vision Pilot LinkedIn group](#), go to [www.linkedin.com](http://www.linkedin.com) and join the group.