



Targeted Service (Foundation II)



I can lead and promote my club's participation in unique, significant and targeted service opportunities through our Foundation.

Session Goals

- Review the Rotary Foundation Grant Model
- Discuss the importance of the Grant Model to your club
- Discuss the Importance of the Six Areas of Focus and Sustainability

Materials

- a [Insert TS-1: Targeted Service Case Studies](#)
 - a [Insert TS-2: Grant Model Flowchart](#)
 - a [Insert TS-3: SHARE Flowchart](#)
 - a [Insert TS-4: Areas of Focus Chart](#)
 - a [Insert TS-5: What is Sustainability?](#)
- [Rotary Foundation Reference Guide 219-EN \(114\)](#)
- [Learning & Reference page at Rotary.org](#)
<https://www.rotary.org/myrotary/en/learning-reference>

Key: attached insert online article ppt

This is a course in the Service Spiral going across the 3 days of RLI. Prior courses include Our Foundation and Service Projects. Additional courses building on this session are International Service, Rotary Opportunities, and Making a Difference. Leadership and Membership have separate spirals.

While this course and others within RLI discuss Rotary Foundation topics and the programs of our Foundation, you should consult your district for specific Rotary Foundation training opportunities.

Session Topics

- 1) What is the Mission of our Rotary Foundation? **Review from Part I: Our Foundation.**
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.
- 2) What are the categories of grants in the Foundation Grant Model? How can each grant type be used? **Refer to Table after Q9 (and Faculty Notes following). Note that "Packaged Grants" were discontinued 4/2014. Refer to discussion for Q.3 and Q.7.**



- 3) How does the new Grant Model benefit your club and district? *(a) Easier to understand as only 2 grant types, down from 12. Packaged Grants were initially in the Grant Model, but by Trustee Decision of 4/2014 they are being phased out in 2014-15 by being allowed to expire. (b) More effective, targeted service, with higher percentage of budget now going to large-scale, high-impact, sustainable grants. (c) Control of grant decision-making is now much closer to the club level. (d) More input from Rotarians is being sought as Districts are encouraged to survey Rotarians and find out what they want to do with grant funds. (e) Streamlining of the grant process is up to the District. (f) Education of club members is now required to qualify for grants. From Global Outlook: a Rotarian's Guide to the new Foundation Grants (updated by RLI).*
- 4) How do the Annual Fund, the Endowment Fund, and the World Fund work together to fund grants? *See Insert TS-3 SHARE Flowchart.*
- 5) What are the Areas of Focus and why are they important? *The Six Areas of Focus are: (a) Peace and conflict prevention/resolution, (b) Disease prevention and treatment, (c) Water and sanitation, (d) Maternal and child health, (e) Basic education and literacy, (e) Economic and community development. The Six Areas of Focus are important because: (a) they reflect critical humanitarian issues and needs worldwide, (b) Rotarians are already addressing them, (c) they align Rotary with other international developmental efforts, and (d) it strategically furthers the mission of The Rotary Foundation. See Insert TS-4: The Areas of Focus Chart.*
- 6) What is the value of sustainability in projects? *In 1983 the Brundtland Commission, convened by the United Nations issued a report that established the oft-cited definition of sustainable development as “meeting the needs of the present without compromising future generations’ ability to meet their own needs.” Today, considerations about sustainability affect many of our daily activities. Businesses have learned that sustainable practices can increase profits, and governments have found that sustainable development can have environmental, economic and social benefits. For an international organization like Rotary, using the principles of sustainability to inform humanitarian work helps extend the impact of Rotarians’ global projects and ensure that communities benefit from their good works for*

Rotarians have long been doing service in support of peace, health, education, and the alleviation of poverty to further the mission of The Rotary Foundation.

The [New Grant Model] further focuses these efforts in a few key areas of demonstrated Rotarian interest to create more opportunities to collaborate with other organizations and achieve greater worldwide exposure for the work of Rotarians and their Foundation.

1996-97 RI Pres. Luis V. Giay
The Future Vision Plan of The Rotary Foundation- June, 2008



years to come. From *Global Outlook: a Rotarian's Guide to the Sustainability*. See further, Insert TS-5: What is Sustainability?

From The Rotary Foundation Resource Guide: For The Rotary Foundation, sustainability means providing solutions to community needs in such a way that the benefiting community can maintain the activities after grant funding ends. Global grant projects must be sustainable and display the following characteristics:

1. *Community needs — The host community and Rotary project sponsors develop projects based on the community's assessment of its needs and strengths.*
 2. *Appropriate technology — Project materials are appropriate for the community and, ideally, are purchased locally.*
 3. *Sustainable funding — The community is able to sustain the project without ongoing financial support from The Rotary Foundation or other Rotary sources.*
 4. *Knowledge transfer — The project includes teaching beneficiaries how to address their ongoing needs after the project is completed.*
 5. *Motivation — The community is able to assume ownership of the project upon its completion.*
 6. *Monitoring and evaluation — The project includes a measurement plan to confirm significant improvement, ideally for at least three years.*
- 7) Why are partnerships with other organizations significant? *Clubs can strengthen their service projects by collaborating with individuals, organizations, and Rotarian-sponsored groups that are based in the community being served or that have expertise in a particular area of service. Working with partners can help even small projects achieve a greater impact, and can help established projects become more effective and sustainable. (Excerpted from Club Service Projects Committee Manual, P.6, revised by RLI)*

Note that Rotary and The Rotary Foundation uses the term “partner” in many different contexts, from our “partners” in the polio eradication effort, to encouraging clubs to develop “partners” in their community to support their activities and projects.

Note that by Trustee Decision of 4/2014, formal “Strategic Partners” in the Grant Model are being phased out along with “Packaged Grants”. “Strategic Partners” were organizations or institutions with whom Rotary had a formal relationship to secure resources such as funding, advocacy, or technical expertise to enhance Rotarian



service opportunities through the creation of packaged global grant opportunities (large-scale, sustainable projects supporting our areas of focus). They were non-profit organizations, universities, and corporations that: (a) Have a global scope of work – organizations that are peers of Rotary, (b) Are working in districts with Rotary clubs, (c) Have technical expertise in one or more of the six areas of focus, (d) Have successfully worked with Rotarians or are interested in working with Rotarians, (e) Can provide increased service opportunities for Rotarians, (f) Can contribute at least US\$1 million in cash or in-kind contributions to the relationship. While this formal designation has been phased out, the positive aspects of partnering with these types of organizations for other service projects or grants are still important considerations.

- 8) Breakout and Consider the Case Studies. Suggested Facilitation Technique. Divide into groups of about 3-4 participants each and assign the case studies. Have them refer to the Inserts TS-2 Grant Model Flowchart, TS-3 SHARE Flowchart, TS-4 Areas of Focus Chart & TS-5 What is Sustainability? Have a different people in the group report on each question, including the case summary. Alternate division would be for each in group to explain how they analyzed their case study using a specific Insert. Give adequate time for reporting back to the entire group. Sub-groups can be combined into 2 larger groups, one for each case study, to compare results before presentation. Tie in these projects to Q9.

- 9) How can the Grant Model encourage Rotarians to participate and contribute? Through Rotary Foundation participation and support, your club can make a difference in the lives of people around the globe. Participation in Rotary Foundation activities can help attract and keep members. When Rotarians experience Foundation programs directly, they can be inspired to contribute to The Rotary Foundation. See Q3 for Club and District benefits. A program where decisions are made by district or club level Rotarians, that are simple enough to understand, that are more effective, and that Rotarians know about because of surveys and continued education, are more likely to engage Rotarians to participate and support.

Note on Funding Model Changes. There are numerous Funding Model changes effective July 1, 2015. The key change is that not all Annual Fund contributions will fund project costs after the three year investment cycle, some will fund operations. This will affect the World Fund and will not affect District Designated Funds (DDF). In “THE DETAIL” on Insert TS-3: Share Flowchart, it is explained as follows: “Under those changes, the World Fund would be reduced by 5% of Annual Fund contributions, 5% of cash contributions to fund Global Grants and 10% or less of select corporate gifts, to fund operations, an operating reserve, with any surplus going annually to the Endowment Fund.” More information on the changes is detailed in the Rotary Foundation published flyer entitled “Securing our Foundation’s Future”



published April, 2014. RLI Faculty are encouraged to read this document and update this information for more recent changes, as more changes may occur. Participants should be encouraged to consult with their District Foundation leadership if they have any more detailed questions.

Can the Grant Model help a club's public image? ***Programs that are effective, make a big difference in the outcome for others, and are easily to explain can be more readily and effectively communicated to others, whether inside the club, or outside the club. Those in the media are interested in a big story with local involvement.***

Conclusion of Session

- ***Summarize that Goals of Session have been met and how: Discussed:***
 - ***Reviewed the Grant Model***
 - ***Discussed the importance of the Grant Model to your Club***
 - ***Discussed the concepts of the Areas of Focus and Sustainability***
- ***In the Our Foundation session in Part I, we hope you were inspired by the great things that our Rotary Foundation is doing in the world.***
- ***In this session, our overarching goal is to provide you with some of the terminology, tools, key concepts and methods of the Grant Model.***
- ***Projects that you start in your club can turn into the next Polio Eradication Campaign, or can spread across a continent to give people less fortunate than we are clean water, education, or a chance at a better life.***
- ***Now that you know what is available, we encourage you to use those tools, learn more from your district grant seminars, develop your Rotary contacts, and get out there are start doing the work of Rotary- "Doing Good in the World".***
- ***In a world filled daily with bad news of poverty, crime, and misfortune, we are a force for good in the world. We are making a difference. You are making a difference.***



| Foundation Grant Model | | |
|--|---|---|
| District Grants | Global Grants | Packaged Grants * |
| Fund small-scale, short-term activities that address needs in your community and communities abroad. Each district chooses which activities it will fund with these grants. | Support large international activities with sustainable, measurable outcomes in Rotary's areas of focus. Grant sponsors form international partnerships that respond to real community needs. | Designed by Rotary and our strategic partners to help Rotarians carry out large-scale, sustainable projects. Because the projects framework is provided, you can focus your energy and expertise on doing the project |
| Humanitarian projects, including service travel and disaster recovery efforts; Scholarships for any level, length of time, location, or area of study; Vocational training teams and Group Study Exchange. | Requires clubs in two countries. Funds Scholarships, humanitarian projects, and vocational training. | Like global grants, packaged grants support our areas of focus and can include scholarships, humanitarian projects, and vocational training. <i>*Discontinued effective 2014-15</i> |

Note on District Grant Changes: *District Grants (but not Global Grants) can now additionally fund (a) Rotary Youth Exchange, RYLA, Rotaract or Interact, (b) Construction, including low cost shelters, (c) Travel for staff of cooperating organizations, (d) Activities primarily implemented by an organization other than Rotary. Further, educational and humanitarian training events are now allowable. (April 2014, Trustee Decision 96)*



Insert TS-1: Targeted Service Case Studies

Case Study A

John and Mary come to live in a new country where they do not speak the local language. They find it difficult to fit into the community. They attend the local schools but have limited resources for individual language training. Their parents speak only their native language increasing the sense of isolation for the whole family.

This is one family but there are many families with the same issues in the community. Your Rotary Club has decided to supply bilingual dictionaries as needed to all the local schools. It is determined that there are 300 students in the schools in the 5th grade. Each dictionary costs US \$5.

Conduct small group discussions on these questions:

- Which type of Rotary Foundation grant would you apply for? Why?
- Is the grant sustainable? Why or why not?
- Does the project fit an area of focus? Which one?

Each group reports back to the whole group on each question explaining their reasoning for their answers.

Case Study B

The residents of Patari, a village in Uttar Pradesh, are among 25 million people in India who suffer the consequences of fluorosis, an irreversible condition caused by elevated levels of fluoride in drinking water. The painful effects of fluorosis can include bone deformities, calcification of ligament and tendons, and osteosclerosis (abnormal bone density). Dental effects include mottling and erosion of tooth enamel. The fluoride, because of its strength, rots teeth and destroys bones. Your district would like to work with the district in India to provide fluoride filters to 60 families in Patari through a Rotary Foundation grant-funded project. The US \$40,000 project also provided toilets, safe drinking water, and hygiene training to eight schools serving about 2,300 students in Uttar Pradesh.

The World Health Organization estimates that almost one-tenth of global disease could be prevented by improving the water supply, sanitation, hygiene, and the management of water resources. As the Indian villages demonstrate, the solution requires a targeted approach, including assessments of each community's needs.

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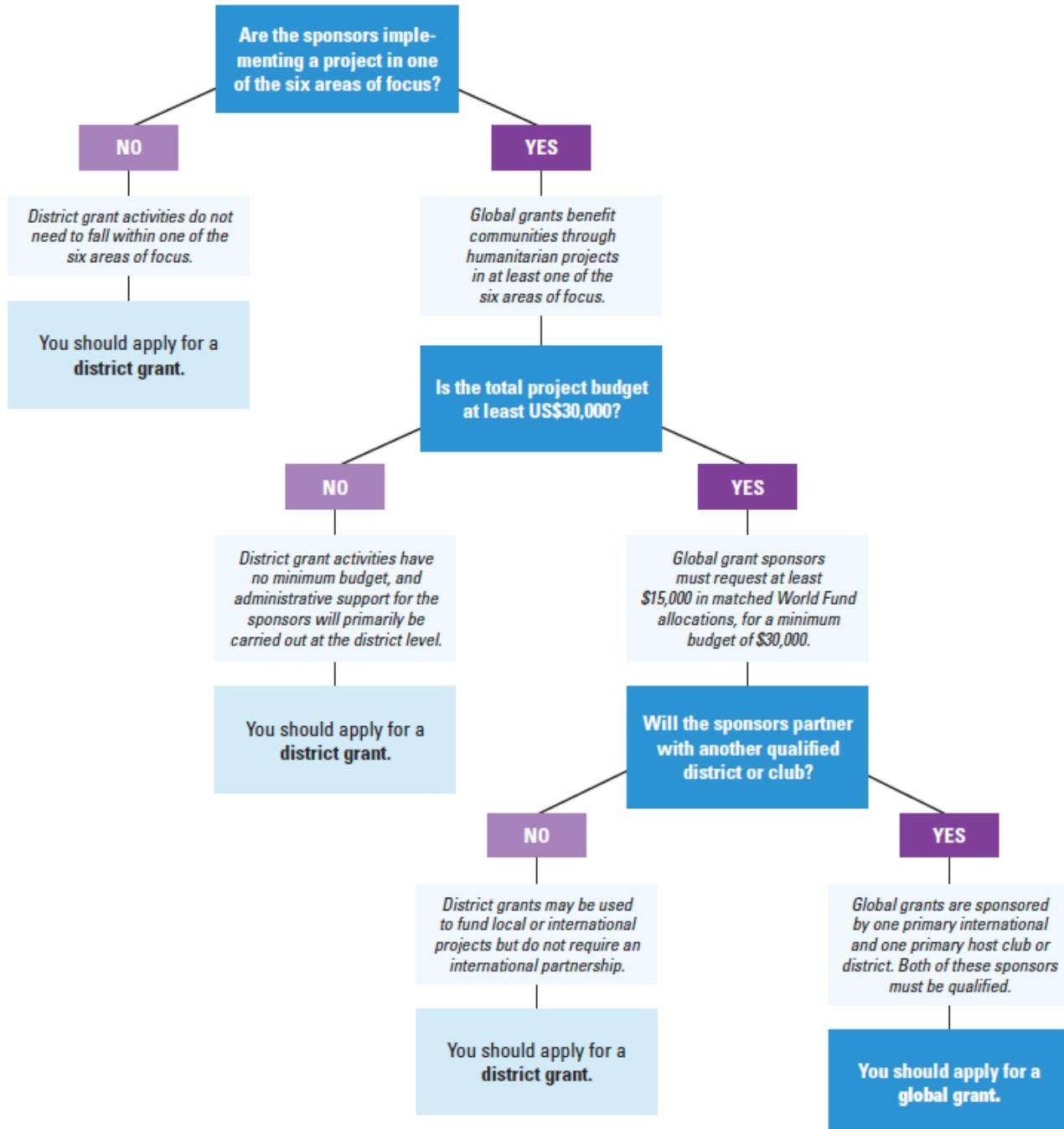
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Insert TS-2: Grant Model Flowchart

Determining a Grant Type for a Humanitarian Project

A district/club is interested in a **humanitarian project**. The following questions can help Rotarian sponsors determine whether to apply for a global grant or a district grant.

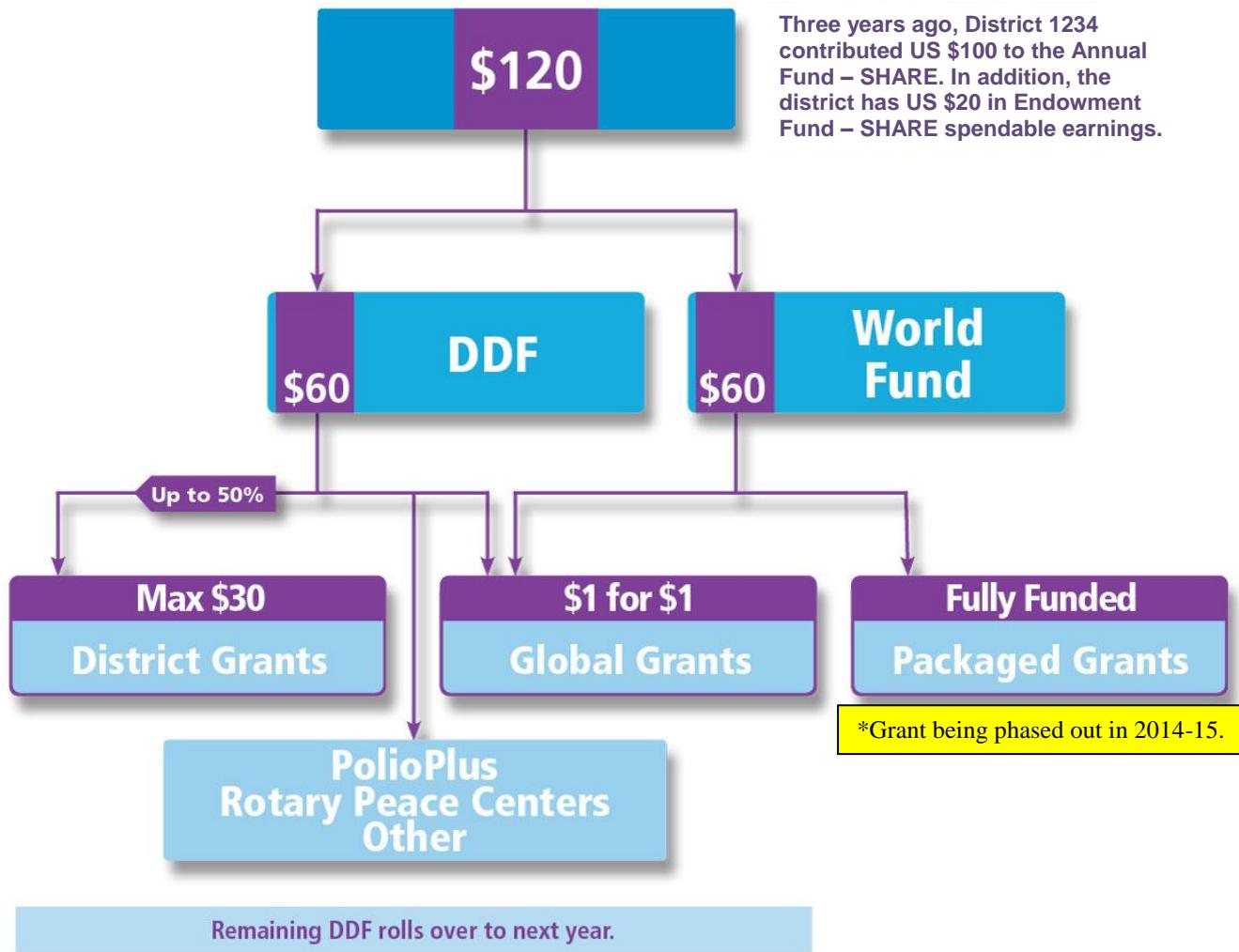


Ref: TRF Training Workbook Jan 2013 17-19 San Diego CA USA



Insert TS-3: SHARE Flowchart

SHARE System



THE DETAIL. How does the SHARE System work? Annual Fund contributions are invested for a three year period. In the third year, the money is divided 50/50 between the district and the World Fund (WF). The district's part of the funds are called "District Designated Funds" (DDF). Districts can use up to 50% of their DDF to pay for club and district projects through District Grants. The remaining DDF may be used for Global Grants or donated to PolioPlus, the Rotary Peace Centers, or another district. If DDF is not used in a given year, then it accumulates in the district's account and may only be used thereafter for Global Grants. World Fund contributions are used to match Global Grants and formerly to fund Packaged Grants*. The World Fund matches DDF (1:1), and cash (0.50:1), for contributions to a Global Grant. District Grants can be any amount while Global Grants must be at least US\$30,000. Numerous Funding Model changes will become effective July 1, 2015, however none currently affect DDF. Under those changes, the World Fund would be reduced by 5% of Annual Fund contributions, 5% of cash contributions to fund Global Grants and 10% or less of select corporate gifts, to fund operations, an operating reserve, with any surplus going annually to the Endowment Fund.



The Rotary Foundation Areas of Focus

| TRF MISSION | 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. | | | | | |
|----------------------|--|---|---|--|---|---|
| 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 |
| STATEMENT OF PURPOSE | The Rotary Foundation promotes the practice of peace and conflict prevention/resolution by: | The Rotary Foundation reduces the causes and effects of disease by: | The Rotary Foundation ensures that people have sustainable access to water and sanitation by: | The Rotary Foundation improves the lives of mothers and their children by: | The Rotary Foundation promotes education and literacy for all by: | The Rotary Foundation invests in people to create measurable and enduring economic improvement in their lives and communities by: |
| GOALS | Strengthening local peace efforts | Improving the capacity of local health care professionals | Increasing equitable community access to safe drinking water and basic sanitation | Reducing the mortality rate for children under the age of five | Ensuring that children have access to quality basic education | Strengthening the development of local entrepreneurs and community leaders, particularly women, in impoverished communities |
| | Training local leaders to prevent and mediate conflict | Combating the spread of HIV/AIDS, malaria, and other major diseases | Strengthening the ability of communities to develop and maintain sustainable water and sanitation systems | Reducing the maternal mortality rate | Reducing gender disparity in education | Developing opportunities for decent and productive work, particularly for youth |
| | Supporting long-term peace-building in areas affected by conflict | Enhancing the health infrastructure of local communities | Improving access to essential medical services and trained health care providers for mothers and their children | Increasing adult literacy | Strengthening the capacity of communities to support basic education and literacy | Building the capacity of local organizations and community networks to support economic development |
| | Assisting vulnerable populations affected by conflict, particularly children and youth | Educating and mobilizing communities to help prevent the spread of major diseases | Supporting studies related to maternal and child health | Supporting studies related to basic education and literacy | | Supporting studies related to economic and community development |
| | Supporting studies related to peace and conflict resolution | Supporting studies related to disease prevention and treatment | | | | |

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| | Assisting vulnerable populations affected by conflict, particularly children and youth | Educating and mobilizing communities to help prevent the spread of major diseases | Supporting studies related to maternal and child health | Supporting studies related to basic education and literacy | | Supporting studies related to economic and community development |
| | Supporting studies related to peace and conflict resolution | Supporting studies related to disease prevention and treatment | | | | |



Insert TS-5: What is Sustainability?

The word sustainable often describes something that is environmentally friendly. But environmental concerns are just one aspect of sustainability. Economic, cultural, and social factors are equally important. When a humanitarian project addresses all four levels of sustainability, it has a better chance of producing long-term benefits for the community it serves. Here are examples of ways to incorporate sustainability into your next project. [From *The Rotarian*, Feb. 2012]

