

FACULTY GUIDE
Part II: Targeted Service (Foundation II - Fall/20)

Prior to the Session:

1. Familiarize yourself with the terms of the Rotary Foundation
 - a. <https://www.rotary.org/en/about-rotary/rotary-foundation>
 - b. [The Rotary Foundation Reference Guide](#)
 - c. <https://my.rotary.org/en/take-action/apply-grants>
2. Review the grant model. (Updated July 1, 2020). Guidance available (Rotary_Grants_terms_conditions_en.pdf)
3. Grant model guidance as of July 2020 - <https://my.rotary.org/en/take-action/apply-grants/district-grants>
4. Prepare a newsprint with The Rotary Foundation mission on it. Post for reference.

*NOTE: The Grant Model has been updated as of July 2020. The new guidelines are available using links given above in #2 and #3. Resources included above. **Inserts TS-2, TS-4 and TS-5 in the participant manual are no longer valid.** Be sure to become acquainted with the new model.*

Begin the Session:

- Introduce yourself and session
- Orient to the materials
- Review Session Goals and where the course fits into the Service curriculum of RLI
- Point out referenced materials and where they can be found
- Quickly review the Insert TS-1 “Good to Know for Targeted Service”

Partners - Warm-up – The Rotary Foundation (TRF) Mission

- Share The Rotary Foundation Mission with the group (newsprint)
- Form participants into partners
- Looking at the mission of TRF think of an example of something your club has done that supports this mission
- Share your examples with your partner
- Take a couple of examples

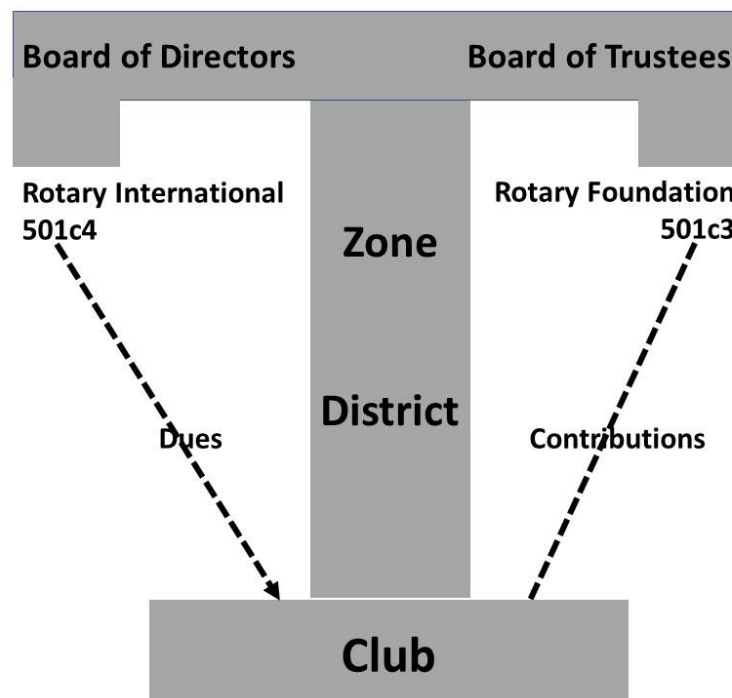
Prompt 1 – With your partner, share an example of something your club has done that supports the mission of The Rotary Foundation. You will have two (2) minutes each and we will then take some examples

DISCUSSION – The What's & Whys of TRF

- Share with the participants what TRF is and why it was formed
 - Rotary Foundation is the charitable arm of Rotary
 - It is 100% supported by voluntary contributions
 - Rotarians and friends of the Foundation share a vision for a better world
 - Donations make possible projects that bring sustainable improvement to local communities
 - Charity Navigator (<https://charitynavigator.com>) gives TRF 4 Stars – excellent use of funds

Prompt 2 – The Rotary Foundation (TRF) is the charitable arm of Rotary. It is 100% supported by voluntary contributions from Rotarians and friends that share a vision for a better world. Donations to the Rotary Foundation make possible projects that bring sustainable improvement to local communities.

Let's look at how the money flows.



- Describe the structure of the organization using the T-model
 - Club – District – Zone
 - Rotary International – governed by a Board of Directors
 - The Rotary Foundation – governed by a Board of Trustees
 - They are separate organizations with different IRS tax status
 - Rotarians pay dues part of which goes to the District and RI
 - Rotarians and Friends of Rotary make volunteer contributions to the Rotary Foundation

Prompt 2 – What difference do you see between The Rotary Foundation and Rotary International? What do the dotted lines represent? Are you as a Rotarian a member of Rotary International? What questions do you have?

HUMAN POLL – Who has participated in Rotary Grants?

- Create three areas of the room and identify them as:
 - NO Grant
 - District Grant
 - Global Grant

Prompt 3 – How many of you are in clubs that have participated in either district grants or global grants?

- Introduce the activity by presenting these three statements.
 - I am not aware of any grant in which my club has participated
 - My club has participated in a district grant.
 - My club has participated in a global grant.
- Have participants move to the area of the room that best describes their club
- Comment on the results of your human poll – where are the most folks/where are the least

SMALL GROUPS – Club District and Global Grants

- Divide the participants into groups of 4-6 people
- Direct the small groups to choose a spokesperson

Prompt 4 - In your breakouts, share with each other the grants in which your club has participated - either a district or global grant. Talk about who you think benefited from the project funded by the grant. Include in the discussion how many club members were involved and in what ways.

Debrief Discussion

- Have each group report on their discussion
- Discuss benefits of district and global grants in terms of multiplying individual donations

Introduce Topic – What's Sustainability?

- Have participants generate synonyms for SUSTAINABILITY
- Invite them to write them on post-it notes
- Post on a large newsprint titled SUSTAINABILITY

Prompt 5 – What does the word SUSTAINABILITY mean to you? What word or words would you substitute for it? Enter your ideas on separate post-it notes

- Acknowledge the responses as they come in. Share with the group.
- Transition to a discussion on Sustainability

Discussion – Sustainability/Areas of Focus

- Use **Insert TS-6 What is Sustainability** as a basis for the discussion
- Include Economic, Cultural, Environmental and Social Aspects
- Transition to the Areas of Focus
- Introduce the Seven Areas of Focus – **Insert TS-5 Areas of Focus** (Does not include Seventh Area of Focus – Supporting the Environment)
- Review all seven areas
- Clarify their role in district and global grant funding

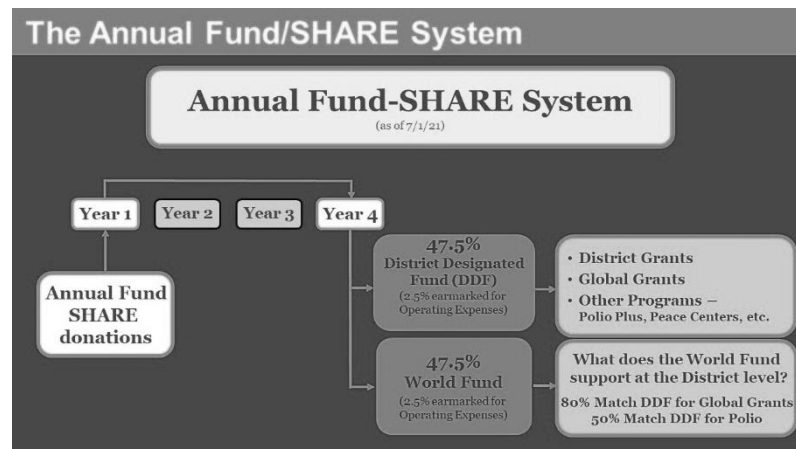
Small Group – Case Study

- Divide group into at least two groups – one for each case study
- If you have more than 12 or 14 participants form four (4) assigning each case study to two different groups
- Optimal size for a small group is three (3) to six (6) people
- Case studies are found in participant book (**Insert TS-3**) and are examples of typical district and global grants funded by the Rotary Foundation
- Assign Case Studies
- Instruct participants to respond to the questions following the description of the situations

Prompt 7 – Each breakout group will have a case study to consider. Choose a spokesperson for your group. Discuss the grant project described. Respond to the questions following the narrative. You have 10 minutes.

- Have the group's report on their discussion

Debrief Discussion



Refer to the funding model as illustrated on the slide. Highlight common themes or other insights from the debrief and lead the discussion including some or all the following information.

- The current grant model with two types of grants, has greatly simplified analysis for what type of grant to use for a project
- District grants are most flexible and are run by individual Rotary district leadership
- Sustainability is not just a “buzzword”, it seeks practices that will make a project effective lasting and adopted by the community served.
- Areas of Focus drill down on the Mission of the Rotary Foundation.
- Rotarians impact global issues one problem at a time, but made collective and measurable by the Areas of Focus
- Changes made to the Funding Model effective July 1, 2020, include:
 - There are now SEVEN areas of focus; the seventh being “Support the Environment”
 - While a Global Grant still requires a minimum of \$30,000, it is no longer required that a minimum of \$15,000 come from the World Fund (TS-4 Rotary Foundation Funding Model needs updated)

- In the past, Cash contributed to a Global Grant was matched 50% by the World Fund. As of July 1, 2020, Cash is no longer matched by the World Fund. District Designated Funds (DDF) continues to be matched up to 100% by the World Fund.
- SHARE is not an acronym; it is a method of spreading the impact of giving by the Rotarian to meet the priorities of the Rotary Foundation and to encourage maximum involvement and access by Rotarians worldwide.
- Grant Model
 - Club members contribute to TRF; Clubs report total contribution at end of each Rotary year
 - 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
 - The district's portion of the funds are called District Designated Funds (DDF)
 - Interest earned during those three years is used to cover administrative expenses (If insufficient to cover these expenses, 5% of the 50% can be used; to date that has not happened)
 - 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
 - Polio Plus contributions are matched 2:1 by the Bill and Melinda Gates Foundation and are spent immediately for polio eradication efforts
 - If DDF is not used each year 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
 - The World Fund matches DDF (1:1) for contributions to a Global Grant
 - District Grants can be any amount while Global Grants must be at least \$30,000
 - Polio Plus contributions are matched 2:1 by the Bill and Melinda Gates Foundation and are spent immediately for polio eradication efforts

- Any surplus in the World Funds goes to the Endowment fund
- Rotarians have the option of contributing in larger amounts
 - Major Donors
 - Bequest Society
 - Paul Harris Society
 - Paul Harris Fellows
- Rotary has a lot of partnerships which have different meanings in different contexts through Rotary and the Rotary Foundation
 - Expertise
 - Community access and knowledge
 - Greater Impact
 - More effective and sustainable
- Grant Model helps club's public image
 - Media attracted to big story with local involvement
 - Effective, impactful, easily explainable projects can be more readily and effectively communicated to others
 - Encourages members to participate and contribute to do good in the world
- Opportunity for global impact
 - Involved clubs attract and keep members
 - Inspired by rotary Foundation programs inspire members are more likely to give and participate
 - Local decision making develops ownership in the process

Summarize:

- In Part I we were inspired by the good Rotary Foundation is doing in the world.
- In this session our goal is to provide some of the "how" with terminology tools, key concepts, and methods of the Grant Model
- All projects are local to somebody – the needs are local and real
- A small project started today could develop into the next big project – Even Polio Eradication began small
- As Rotarians we have adopted a mission to help others

Prompt 8 – Now knowing some of what is available through the Rotary Foundation, use these tools, motivate your club, go to your district seminars, develop your Rotary contacts (including those you have made in RLI), and start “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. Thank you!