

The Future Vision Plan of The Rotary Foundation

IN ANTICIPATION OF THE FOUNDATION'S 100-YEAR ANNIVERSARY IN 2017, the Trustees set out in 2005 to develop a 10-year vision with a 3-year plan to move the Foundation toward its second century of service. This vision and plan reflect input from a wide variety of stakeholders through interviews, surveys, focus groups, and input sessions and include a comprehensive approach for setting goals and a roadmap for successful execution.

A vision was developed for the Foundation: To enable Rotarians to advance world understanding, goodwill, and peace. This became the basis for the Foundation's new mission statement:

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.

The Foundation's new mission and vision, along with its new motto — Doing Good in the World — were approved by the Foundation Trustees and the RI Board and endorsed by the Council on Legislation.

The Future Vision Plan is designed to

- Simplify Foundation programs and processes consistent with the mission
- Focus Rotarian service efforts where they will have the greatest impact by addressing priority world needs that are relevant to Rotarians
- Offer program options to help achieve both global and local goals
- Increase the sense of ownership at the district and club levels by transferring more decisions to the districts
- Gain greater understanding of The Rotary Foundation's work and enhance Rotary's public image

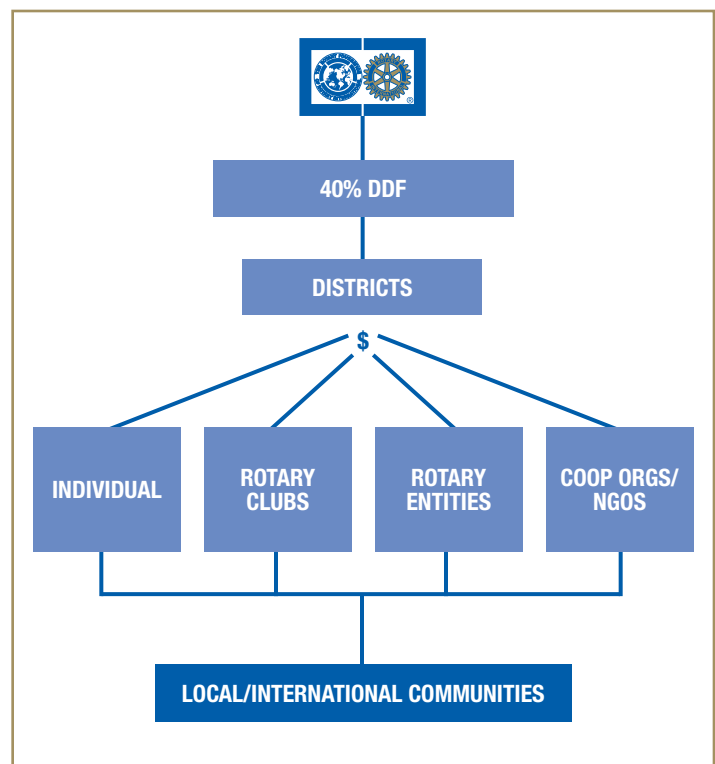
With a goal of full implementation by 2012-13, the Future Vision Plan offers new models for

- Grants structure
- Strategic cooperative relationships
- Distributable funds

Grants Structure

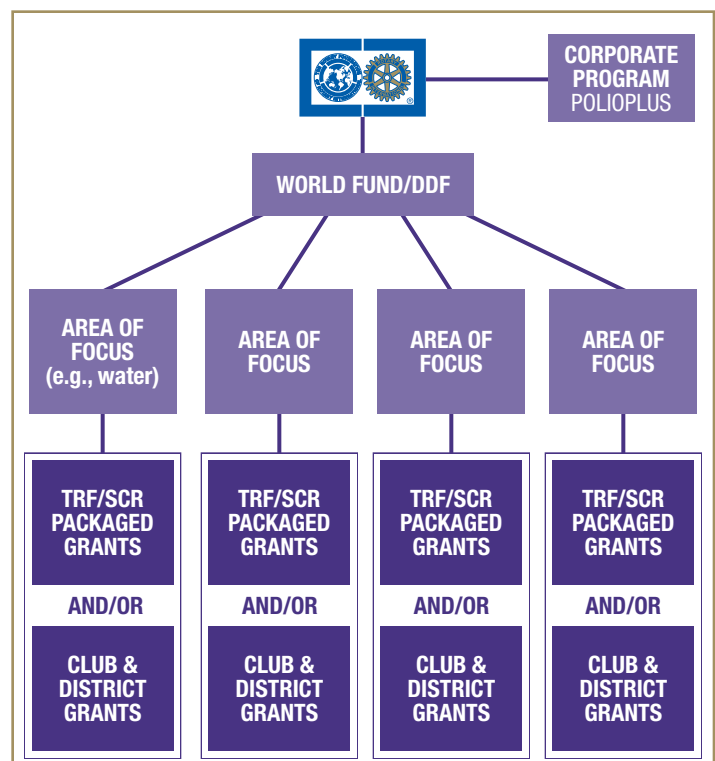
Under the new grants structure model, all grants will fall into one of two categories and consolidate educational and humanitarian programs.

The first type of grants, shown at right, allows clubs and districts to support their specific service interests and address immediate needs in their communities and abroad. Provided as block grants to districts, these grants are modeled after the current District Simplified Grants and are designed to give clubs and districts a greater sense of ownership. These grants provide flexibility in carrying out short-term activities that will preferably be completed in less than 18 months. Clubs and districts are encouraged to form international partnerships and work with local organizations to address needs in their local communities or abroad. Districts will be able to use up to 40 percent of their District Designated Fund (DDF) to support these grants.



The second type, shown at right, offers opportunities to participate in more strategically focused, sustainable activities with greater support from the Foundation. These grants will fund larger projects in a strategic area of focus — a priority world need identified by Rotarians for which the Foundation is directing its resources to have a sustainable and measurable impact. (Three to five areas of focus will be determined by the Trustees at their April meeting, based on demonstrated Rotarian interest and experience in current Foundation programs, and considered at the June Board meeting.) Under this grant type, clubs and districts will select from two options:

- Package projects with strategic cooperative relationship (SCR) organizations
- Club- and district-designed projects

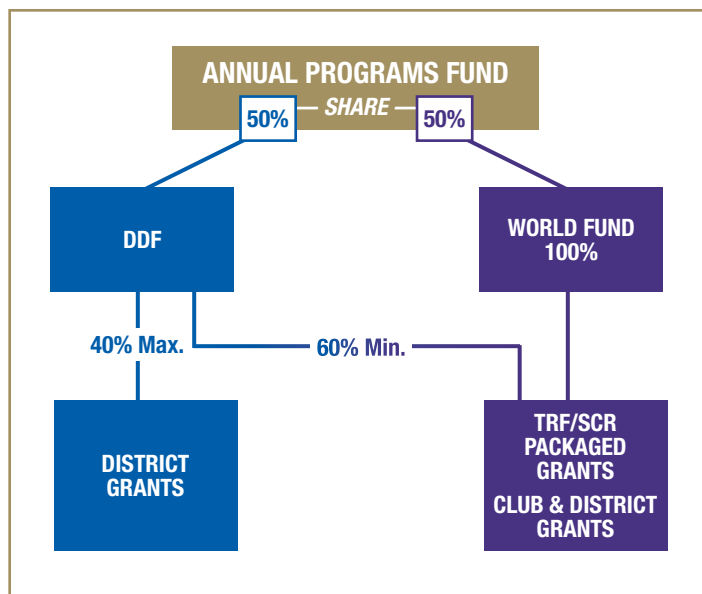


Strategic Cooperative Relationships

The Rotary Foundation will form strategic cooperative relationships (SCR) with organizations that specialize in one of the strategic areas of focus. The SCR organizations would provide financial support, technical expertise, and/or advocacy efforts in projects and activities that are designed jointly with the Foundation and include Rotarian participation. In addition to increasing the impact of Foundation grants, these relationships will offer opportunities to achieve greater recognition of Rotary's work.

Distributable Funds

A distributable funds model is designed to simplify the funding process (shown below).



The first type of grants, or block grants, will be funded by a percentage of District Designated Fund (DDF). During the three-year pilot phase, districts may use up to 40 percent of their available DDF to support smaller local and international projects and broadened activities. This percentage will be reviewed annually by the Trustees.

Under the second type, club- and district-designed grant projects will be supported by a World Fund match of DDF; other alternatives are also being considered. Package grant projects will be funded through a competitive process by the World Fund, contributions from SCR organizations, and other sources under consideration. Designed to achieve the most effective and strategic use of Foundation resources in reaching sustainable outcomes, the package grant projects will not require club and district financial support.

Implementation

The Future Vision Plan will be implemented in stages as identified in the draft transition plan (to be finalized in April). In 2008-09, the Trustees will select approximately 60 geographically dispersed districts to participate in a pilot program that will run 2009-12. The remaining districts will continue to use the current programs and grants processes.

Clubs and districts will receive more information about the program after the April 2008 Trustees' meeting, and interested districts will be invited to submit applications in 2008-09.

Next Steps

The final Future Vision Plan models will be delivered to the Trustees at their April 2008 meeting. The key decisions anticipated include:

- Names of the grant types
- Selection of the areas of focus
- Current program changes
- Final funding alternatives
- Final approval of the transition plan and pilot program
- Guidelines for districts to participate in the pilot program

Being everything to everyone has left the Foundation struggling to realize its mission. The new structure allows us to build on our strengths and realize more sustainable outcomes.

Robert S. Scott
Rotary Foundation Trustee Chair

The new mission of the Foundation has provided greater clarity for Rotarians about the priorities of our organization. The new grant structure will more effectively align the outcomes of grants with these priorities and enable Rotarians to produce tangible results from their work through the Foundation for the world to see.

Jonathan B. Majiyagbe
Rotary Foundation Trustee Chair-elect

Our new models all meet the established criteria of a “five-way test” for a simpler, more accessible Foundation. They 1) are simple, 2) are cost effective, 3) require significant Rotarian involvement, 4) have sustainable outcomes, and 5) are consistent with the Foundation’s mission. We are in the process of gradually transforming our Foundation as we prepare to celebrate its first century in 2017.

Luis Vicente Giay
Future Vision Committee Chair

