



THE ROTARY FOUNDATION FUTURE VISION PLAN

Quick Reference Guide

In 2008, The Rotary Foundation Trustees adopted the Future Vision Plan, a forward-looking, strategic approach to fulfilling the Foundation's mission that will continue its transformation and advancement. This guide provides basic information on the structure of the plan, the rationale behind it, and the expectations of what it will achieve.

The Need

- For many years, the Foundation has tried to be all things to all people, allocating resources across a wide spectrum of activities. By leveraging resources and focusing them on those areas where Rotarians can be most effective, the Foundation can enable Rotarians to make a greater, more enduring impact. The remarkable success of PolioPlus illustrates the value of this approach and provides a model for the future.
- Through its partnership with the Gates Foundation, the World Health Organization, UNICEF, and the U.S. Centers for Disease Control and Prevention, however, Rotary has gained stature in the world of international development. The Future Vision Plan offers the opportunity to further enhance Rotary's public image through focused, high-impact projects and humanitarian causes.
- The Rotary Foundation's programs have not changed significantly since they were established decades ago, despite enormous changes in the world. As more Rotarians began using Foundation programs, administrative costs increased; the cost of administering a small grant at times exceeded the amount of the grant itself.
- Rotarians have expressed frustration with the current system, calling for a more accessible Foundation, improved grant application process, and greater autonomy.

The Purpose

Based on input from various stakeholders including Rotary senior leaders and grassroots Rotarians, the Foundation Trustees developed the Future Vision Plan, which is designed to:

- Focus service efforts on the mission of the Foundation for greater impact and sustainability
- Improve Rotary's credibility and leadership role in the world of philanthropy, service, and peace
- Offer program options to help clubs and districts achieve both global and local goals
- Increase the sense of ownership at the district and club levels by transferring more decisions to the districts
- Simplify Foundation programs and processes consistent with the mission
- Enhance Rotary's public image through relevant, high-impact humanitarian projects and partnerships with prominent nongovernmental organizations and corporations

The Structure

The Future Vision Plan offers two types of grants: Rotary Foundation District Grants and Rotary Foundation Global Grants.

- **Rotary Foundation District Grants** are block grants made to districts for up to 50 percent of their District Designated Fund (DDF). Districts can use these grants to fund scholarships, support vocational training teams, sponsor volunteer service, provide disaster relief, and carry out community and international service projects. District grants allow Rotarians to respond quickly to urgent needs and to plan smaller projects in their communities and abroad that fit within the mission of The Rotary Foundation.
- **Rotary Foundation Global Grants**, which have a minimum World Fund award of US\$15,000 and maximum of \$200,000, support larger humanitarian projects with sustainable, high-impact outcomes; scholars; and vocational training teams in one of the following six areas of focus:
 - Peace and conflict resolution/prevention
 - Water and sanitation
 - Education and basic literacy
 - Disease prevention/treatment
 - Maternal and child health
 - Economic and community development

There are two types of global grants:

- Club- and district-developed global grants, which are partially funded by the sponsors and receive a match from the Foundation's World Fund.
- Packaged global grants, which are developed by the Foundation in collaboration with Rotarians and strategic partners with expertise in the area of focus being addressed, are funded 100 percent by the World Fund and/or the identified strategic partner. Packaged global grants offer ready to implement projects and activities for clubs and districts to implement efficiently and effectively.

The Strategic Partners

- The Rotary Foundation will partner with select organizations and corporations that have demonstrated expertise in one or more of the areas of focus.
- The strategic partners will provide technical, financial, and/or advocacy resources for packaged global grants.

The Pilot

- Districts may apply to participate in the Future Vision pilot online through Member Access at www.rotary.org until 15 May 2009.
- Participating districts must obtain the approval of two-thirds of their clubs and complete a qualification process that includes mandatory training during 2009-10 for governors and district Foundation committee chairs.
- About 100 districts will be selected to participate. Pilot districts will form a representative group in terms of location, size, and level of involvement with the Foundation.
- The Future Vision pilot will begin on 1 July 2010 and run through 30 June 2013.
- Pilot districts and nonpilot districts may work together for any district grant, though partnerships for global grants will only be available to pilot districts.
- The Foundation will use feedback from the pilot districts to refine the plan for its roll-out to all districts in 2013-14.

The Transition

- All Rotary districts, regardless of their participation in the Future Vision pilot, will be able to participate in PolioPlus and Rotary World Peace Fellows programs.
- Nonpilot districts will continue to operate under the current grant structure until July 2013.
- Some current Foundation programs will be phased out before 2013-14 to free up resources needed for the transition to the new model. The 2010-11 Rotary year will be the last program year for which the Foundation will award Multi-Year and Cultural Ambassadorial Scholarships; Rotary Grants for University Teachers; Health, Hunger and Humanity (3-H) Grants; Volunteer Service Grants; and Disaster Recovery Grants.
- Nonpilot districts will receive training on the new grant structure in 2012-13.

Expected Outcomes

- Through the scope and sustainability of the global grant projects, the Foundation will enable Rotarians to reach a greater number of people and do more good in the world.
- Because of the Foundation's high-impact work in the six areas of focus, Rotary will gain greater prominence in the worlds of international development, education, peace, and public health and in local communities worldwide.
- This enhanced public image will lead to increases in membership and contributions to the Foundation.
- By 2020, the Foundation projects to have reduced programs operation expenses to realize a total net return of \$6 million.