



TRF FUTURE VISION PLAN

AT SECOND PLENARY SESSION

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TRF Trustee & RIDE

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Imagine that we are now living in the year 2020—three years after our centennial.

Imagine that, each of us now nearly 10 years older, some of us in the evening of our lives are talking to our grand kids about one of the world's most famous Foundations.

A Foundation which has done service to mankind on the basis that each life is precious and that all mankind was created equal; A Foundation which has never differentiated between people by cast, community or creed.

Imagine you outlining the achievements of this Foundation.

- That it was now seven or eight years since Polio was eliminated by this Foundation.
- That it had been awarded the Nobel prize
- That it's brand was known for service as much as the Red Cross was known for its disaster relief
- That it was an expert at building and equipping low cost schools.
- That it had a PF of \$1B and its APF contributions each year exceeded \$150M.
- That important multi-laterals and corporates were clamoring to partner this Foundation

Now, imagine that this is the Rotary Foundation that you were talking about.

Is this a dream? Is this fiction? Is it purely our imagination running wild?

No, it's not.

You would be speaking of the way our Foundation could look if its Future Vision Plan succeeds.

In envisioning a new shape for the Foundation the Trustees did not want to simply focus on disbursements; how much money we give out. The Trustees wanted to focus on measuring the benefits derived from these disbursements.

After hundreds of interviews with ordinary Rotarians; after years of study and work and after looking at every aspect of the Foundation the Trustees have begun to unveil the Rotary Foundation of the future.

Never before in the near 100 year history of our Foundation have we made such sweeping changes. Never before has the Foundation envisioned empowering clubs and districts to manage their own funds; Never before has the Foundation focused on specific areas of spending; never before has the Foundation thought of aligning itself with other multi-laterals and corporates who have similar aims; never before has the Foundation conceptualized the idea of a pre packaged grant.

These are complete paradigm shifts.

- Simple
- Cost effective
- Transfers spending decisions to Clubs and District
- Requires Districts and Clubs to be qualified
- Introduces the concept of areas of focus
- Encourages strategic partnerships
- With greater focus towards the TRF mission

So, you may ask, what prompted us to unveil this "Future Vision Plan"?

As the Trustees began to prepare for The Rotary Foundation's centennial in 2017, it became apparent that the organization needed to pay attention to the delivery of services. One obvious telling point was the immense growth in Matching Grants (1965-2000 = 10,000 grants; 2000-04 = 10,000; 2004-07 = 6,700 grants). Basically, we are victims of our own success!

We were drowning in Matching Grant applications and processes and without substantially increasing our staff and thus our overheads we are struggling to deliver better services.

From the studies and from the responses we had, it was clear to the Trustees that we could not be everything to everyone.

Rotarians wanted their Foundation to be very good in some critical areas!

And so based on the principle areas of our mission statement, the four key

Categories that devolved were

- Goodwill & Peace,
Peace and Conflict prevention
- Health,
Disease Prevention and Treatment
Water and sanitation
Maternal and Child health
- Education,
Basic Education and Literacy
- Alleviation of Poverty.
Economic and Community Development

The Trustees have committed to these areas of focus for at least nine years.

Now does this mean we cannot do any other project? No.

Let me explain.

As part of the simplification process grants we have brought down the complex array of grants we had, to just two categories.

ROTARY FOUNDATION DISTRICT GRANTS and ROTARY FOUNDATION GLOBAL GRANTS.

RF District Grants

50% of the available DDF of each District will be awarded to that District as a block grant and is essentially modeled after the current District Simplified Grants. district grants are provided as block grants to districts, using District Designated Funds.

-- Explain --

District Grants provide a lot of simplicity, flexibility, and opportunities for innovation. Clubs and their district work together to fund smaller educational and/or humanitarian activities and projects either locally or internationally. The District Simplified Grants model is a great example of how the new "District Grants" can work. These projects and activities should support the mission of the Rotary Foundation, allowing a broad range of choices for clubs and districts.

District Grants are intended to lessen the bureaucracy and red-tape making it easier for clubs and districts to readily access funds and do the projects and activities they are interested in. The District Grants will require simplified reporting to the Foundation.)

RF Global Grants

The balance 50% of your contribution goes into the world fund from which the global grants are made.

The important thing to remember however is, that the Global Grants will be awarded only in the six areas of focus.

The Global grants are designed to support larger projects and activities, The grants offer opportunities to participate in more strategically focused, sustainable activities.

Under this grant type, clubs and districts will select from two options:

1. Club- and district-developed projects
2. Packaged grants.

The Club and District projects will work exactly like your familiar matching grants and 3-H grant projects, GSEs, and ambassadorial scholarships.

There will be a proviso that the minimum grant amount for both humanitarian and educational activities must meet the minimum award amount of \$15,000

The concept of packaged grants is new. The

Foundation will work to provide projects and activities “off the shelf” that have a standardized approach in creating, implementing, monitoring, and reporting. The Trustees are yet to finalise the final concept of this segment but it is anticipated that the international perspective will be maintained.

District Grants

- Simple, local
- Local decision making
- No red tape/bureaucracy
- Immediate needs
- Smaller activities/projects
- No clear strategy/discretionary
- Simplified Reporting

Global Grants

- Global
- TRF approval
- Procedures exist/ international partners needed
- Sustainable needs
- Larger projects
- Strategic investments
- Leveraging with strategic partners
- Measurable outcomes
- More visibility
- More expertise
- All current TRF activities
- Rotarian involvement needed

To participate in this new grant-structure, districts and clubs must be qualified by the Rotary Foundation. The Foundation is designing a simple process for districts to complete before applying for their first year’s District and Global Grants. It is anticipated qualification will be renewable every three years. Clubs wishing to participate in Global Grants must also be qualified by their districts.

The purpose of qualification is to ensure that clubs and districts have the legal, financial, and stewardship controls necessary to manage grants in the new structure.

The final concept the Future Vision Plan introduces is the aspect of strategic partners. Strategic partners will provide support to Foundation global grant projects in a variety of ways. The Foundation will identify partner organizations in each of the six areas of focus.

Strategic partners will provide financial resources, technical expertise, or advocacy— or any combination thereof. With these partners you may see:

We are not talking about giving funds to a partner to do with it as they please.

Strategic partners will be just that—partners with The Rotary Foundation to support the work and effort of Rotarians to provide services to the communities in need.

Now, when does our new Foundation kick off?

In the second half of 2008-09, the Foundation will distribute information to all districts about the plan and how to apply to become a pilot district. It will also update its publications and materials.

The Future Vision Plan will be launched in 2010 with a pilot program of three years.

In these three years the Foundation will assess how the

plan is working, iron out the various glitches that is anticipated and be ready to roll this out to the world in the fourth year.

For the pilot process 100 Districts will be invited.

You will want to know how these Districts are selected.

The online pilot district application process will be completed from Feb - June 2009. Two-thirds of the clubs in the district must agree to participate in the pilot, along with the current and next two district governors and the DRFC chair.

The training of the districts will occur within the 2009-10 training cycle, beginning at the 2010 International Assembly. That training will involve DGE, DRFC chairs, and RRFs to ensure consistency and continuity.

Why would you want to be a pilot district? The Foundation wants to make it very clear that pilot districts will have both opportunities and challenges.

Opportunities for pilot districts include:

1. Providing input in the refinement of the new structure
2. Receiving more specialized support and service from the Foundation
3. Accessing more funds in the District Grants to use at the district's discretion

However, please understand the challenges:

1. Districts must commit to the full three years of the pilot. Pilot districts cannot elect to withdraw.
2. Districts must be patient and flexible, as we are sure that unanticipated issues will arise, making it necessary to adjust the rules.
3. Some of the super-user districts may find it challenging because pilot districts will be required to partner only with other pilot districts for club and district developed Global Grants.

This means we will have two Rotary Foundation grant-making models operating at the same time as non-pilot districts will continue using the current Foundation programs until worldwide implementation in 2013-14.

The future vision Plan of the Rotary Foundation is completely aligned with the Strategic Plan of Rotary International and the Trustees are thoroughly excited with the prospects it holds.

Because of the Future Vision Plan; We are confident that the passion of the individual Rotarian can be best harnessed; We are confident that our reach to serve mankind will be dramatically extended. We are confident that the Rotary brand will be greatly enhanced and we are confident that this will help us become a worldwide force for good.

As Ted Levitt said "The future belongs to people who see possibilities before they become obvious"

The new Foundation will open up a whole host of possibilities. You and I must have the vision, to be able to see it.

