

季愛雅勾勒出基金會的願景

Giay outlines vision for the Foundation

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將在 2006-07 年度擔任扶輪基金會主委的前社長路易士·季愛雅對國際講習會聽眾發表演講。

Past President Luis Giay, who will chair The Rotary Foundation in 2006-07, addresses the International Assembly audience.

扶輪基金會下屆主委季愛雅(Luis Vincente Giay)說，扶輪基金會頒發人道及教育獎助金，必須主動積極、有彈性、有願景、而且值得信賴。

季愛雅在 2 月 16-23 日在美國加州聖地牙哥舉行的扶輪國際講習會期間，在一場關於扶輪基金會未來的演講中提到這些特色，國際講習會是下屆地區總監的訓練會議。

關於扶輪基金會的短期未來，季愛雅說基金會在 2006-07 扶輪年度的目標為：

- 專注於根除小兒麻痺
- 透過和其他機構建立夥伴關係來提高扶輪基金會作為和平及解決衝突的鼓吹者的形象
- 鼓勵扶輪社員每人平均捐獻 100 美元給年度計劃基金，並創下永久基金巨金捐獻的記錄
- 與國際扶輪一起加強扶輪的公共形象
- 改進基層訓練，以增進扶輪社員對於基金會使命的理解
- 精簡扶輪基金會之教育及人道計畫的管理
- 實施一項**未來計畫**

為協助進行最後一項，保管委員會成立了**未來願景委員會**。(請上網至國際扶輪網站參加委員會的意見調查，網址：<http://survey.rotary.org/perseus/surveys/193461477/55fd031f.htm>)

該委員會已經諮詢專家，並對 20,000 多個扶輪社員做過意見調查。委員會目前正在規劃所謂的未來願景計畫，包括短、中、長期。季愛雅說該計畫將從 2006 年 7 月 1 日起逐步實施，且應該在 2007 年 6 月 30 日之前全面就緒。他說委員會要使扶輪基金會能：

- 採取主動積極而非被動反應的步驟來解決問題
- 服務扶輪社員，「但不會把更多工作、更多文書、更多行政程序加諸社員身上」
- 使扶輪社員在地區階層參與計畫的行政管理
- 使永久基金最遲能在 2015 年之前每年投資超過 4 億美元在計畫上--幾乎等於每二年一個根除小兒麻痺等疾病計畫
- 謹慎管理扶輪基金會的資金

The Rotary Foundation, which awards grants for humanitarian and educational purposes, needs to be proactive, flexible, visionary, and trustworthy, said its incoming chair, Luis Giay.

Giay mentioned these characteristics in a speech about the future of the Foundation during Rotary's International Assembly, a training conference for incoming district governors taking place 16-23 February in San Diego, California, USA.

With respect to its short-term future, Giay said the goals for the Foundation in Rotary year 2006-07 are to:

- Focus on eradicating polio
- Raise the Foundation's profile as an advocate of peace and conflict resolution through partnerships with institutions
- Encourage Rotarians to donate an average of US\$100 each to the Annual Programs Fund and also set a record for major gifts to the Permanent Fund, or endowment fund
- Work with Rotary International to enhance Rotary's public image
- Improve grassroots training to increase Rotarians' awareness of the Foundation's mission
- Streamline management of the Foundation's educational and humanitarian programs
- Implement a **plan for the future**

To help with the latter, the trustees created the **Future Vision Committee**. (Take a survey for the committee.)

<http://survey.rotary.org/perseus/surveys/193461477/55fd031f.htm>

The committee has consulted experts and surveyed more than 20,000 Rotarians. It is working on a so-called Future Vision Plan for the short, medium, and long term. It will go into effect gradually as of 1 July 2006 and should be fully operational by 30 June 2007, Giay said. He said the committee wants the Foundation to:

- Take proactive rather than reactive steps to solve problems
- Serve Rotarians "without piling more work, more paper, more bureaucracy on them"
- Involve Rotarians more in the administration of projects at the district level
- Have the Permanent Fund able to invest more than US\$400 million in programs annually by 2015 — almost the equivalent to a PolioPlus program every two years
- Exercise careful stewardship of its funds

- 成為大多數扶輪社員優先選擇的慈善機構
- 進行新的組織計畫，並尋找財務合夥人來執行計畫

除了概要列出未來願景委員會的目標之外，季愛雅也描繪出他個人對於基金會的長期願景。他說基金會應：

- 將所有計畫合併為四大領域：**保健、教育、環境、及世界和平**
- 不要成立更多的計畫，而是要集中力量來支持及資助扶輪社員的服務活動
- 在維持和平方面扮演更重要的角色
- 成立「**大計畫**」，使「每個人能參與，而且有數百萬人受惠」
- 逐步結束未指定用途之捐獻，並以永久基金支持扶輪基金會每年的所有計畫
- 使人道獎助金計畫成為「**超級巨星**」。他說到了 2010 年這些計畫應該占全部計畫預算的將近百分之 90。其他百分之 10 將是教育計畫，他說。人道獎助金計畫包括配合獎助金；保健、防飢、及人道（3-H）獎助金、及全體參加計畫(corporate program)，最後一項目前就是根除小兒麻痺計畫。目前，人道計畫占計畫預算的百分之 75，他說。在他的構想之下，撥給教育計畫的金額不會縮水，但人道計畫的經費將會增加。
- 每年至少使扶輪基金會的資金增加百分之 10。「在 2007 年，我們將需要 1 億 5000 萬美元，到 2010 年則為 2 億美元--而這些都是年度的數字，」他說。

季愛雅演講完之後，扶輪社員暨國際扶輪訓練領導人艾倫·杰格 Allan Jagger 上台。杰格說百分之 70 的扶輪社員沒捐獻給基金會。他指出，決定錢要用在什麼樣的計畫的應該是扶輪社員，並不是扶輪基金會的保管委員。

「我告訴你一個秘密，」杰格說。「扶輪有足夠的錢資助扶輪社員們憑想像力所想到的每一個計畫，問題是錢還在扶輪社員的口袋裡。」

杰格說在未來 10 年或 20 年，隨著老一輩的凋零，已開發世界將發生龐大的財富移轉。他敦促扶輪社員們把一部份遺產留給永久基金，這個基金的本金永不動用，只有把孳息用在扶輪基金會各項計畫。

「我這一代將留下許多資產，可是壽衣沒有口袋，天堂也沒有銀行，」他說。「在我的文化裡，把一部份遺產留給慈善機構是避免遺產稅的好方法，用這種方式來花你的孩子繼承的遺產也挺不錯的。」

在季愛雅及杰格演講之後，扶輪社員比爾·帕區特 Bill Patchett 提出他的看法。這位 7070 地區總監當選人同意扶輪社員應該拿出支票簿。「我們已經退休或半退休，過著很好的生活。因此要不要幫助那些比較不幸的人，全在於我們怎麼決定，」他說。「沒有任何一個扶輪社員會窮到沒辦法做一兩樁善事。」

- Become a charity of choice for the majority of Rotarians
- Take on new corporate projects and secure financial partners to carry out projects

In addition to outlining the Future Vision Committee's objectives, Giay also described his personal, long-term vision for the Foundation. He said the Foundation should:

- Consolidate programs into four major areas: **health, education, environment, and world peace**
- Not create more programs, but concentrate instead on supporting and funding Rotarians' service activities
- Play a more important role in preserving peace
- Create "**megaprograms**," in which "everyone can participate and millions can receive benefits"
- Phase out undesignated contributions and have the Permanent Fund support all the Foundation's annual programs
- Make the Humanitarian Grants Program the "**superstar**." He said that by 2010 such programs should represent close to 90 percent of the overall program budget. The other 10 percent would be educational programs, he said. The Humanitarian Grants Program includes Matching Grants; Health, Hunger, and Humanity (3-H) Grants, and the corporate program, which is currently polio eradication. Presently, humanitarian programs make up 75 percent of the program budget, he said. Under his idea, the amount of money given to educational programs wouldn't shrink; instead the money for humanitarian programs would increase.
- Increase the Foundation's funds by at least 10 percent a year. "In 2007, we will need \$150 million and by 2010, \$200 million — and these are annual figures," he said.

After Giay finished his speech, Rotarian and RI training leader Allan Jagger took the podium. Jagger said 70 percent of Rotarians do not contribute to the Foundation. He pointed out that Rotarians, not the trustees of the Foundation, decide what types of projects to spend the money on.

"I will let you in on a secret," Jagger said. "There is sufficient money in Rotary to fund every program that the imagination of Rotarians can come up with. The problem is, it's still in the pockets of Rotarians."

Jagger noted that during the next decade or two, a huge transfer of wealth will take place in the developed world as an older generation dies. He urged Rotarians to leave a legacy to the Permanent Fund, a fund in which the corpus is never spent and only the interest is used for Foundation programs.

"My generation is going to be leaving behind many assets, and there are no pockets in shrouds or banks in the sky," he said. "In my culture, to leave a legacy to a charity is a great way to avoid inheritance tax, and it's also a wonderful way to spend your children's inheritance."

After Giay's and Jagger's speeches, Rotarian Bill Patchett offered his opinion. The governor-elect of District 7070 agreed that Rotarians should get out their checkbooks. "We're retired and semi-retired and we lead a good life. So it's up to us to help those less fortunate," he said. "There's not a Rotarian that could not afford to do something."