

扶輪基金會未來願景概述

Future Vision overview

國際扶輪 3520 地區 地區扶輪資訊編譯委員會主委 高永吉 PP Spencer 譯

由於預期扶輪基金會在 2017 年將屆滿 100 週年，因此保管委員會決定在 2005 年逐漸發展出以三年時間的計劃來將扶輪基金會邁向其第二世紀服務的一項 10 年的願景。這個願景及計劃是藉由訪談、調查、重點團體和收集意見的會議以及一項廣泛的探討設定目標處理方式和一項成功執行的藍圖來反映出資金擁有者廣泛的意見。

一項為扶輪基金會發展的願景——能促進扶輪社員對世界的瞭解、親善與和平——它將成為扶輪基金會的新使命聲明的基礎：

扶輪基金會之使命...，是要使扶輪社員透過保健的改善、教育的支持及貧窮的減輕來促進世界的瞭解、親善與和平。

扶輪基金會新的使命及願景和它新的座右銘“於世界行善”——已經獲得基金保管委員會和國際扶輪理事會之核准及立法會議之支持。

未來願景計劃

未來願景計劃將企劃如下：

- 簡化扶輪基金會之計劃及程序以與使命相符合
- 專注於那些藉由扶輪社員致力於世界上最優先與他們有關需求的努力服務之成果，而會有最大的影響
- 提供計劃選項以幫助達成全球及當地的目標
- 將更多的決定權轉予地區以使地區及扶輪社增加歸屬感
- 獲得更加瞭解扶輪基金會的工作並增進扶輪的公共形象。

至 2012-13 年度一項能完全實現的目標，未來願景計劃提供以下新的模式

- 獎助金結構
- 策略性的合作關係
- 可分配的基金

2006-07 年度扶輪基金保管委員會主委羅勃·司考特說“對於每個人的每件事已經讓扶輪基金會努力去瞭解到它的使命。而該新的結構會讓我們去建構於我們的實力與瞭解到更多能維持的後果之上。”

獎助金結構

在新的獎助金結構模式之下，扶輪基金會將提供兩種類型的獎助金：

第一類獎助金將容許扶輪社及地區去支援其特殊服務興趣並滿足其社區及海外立即的需求。提供地區綜合獎助金，這些獎助金將是以現行的地區簡易獎助金計劃為模型演進而

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 three-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 -- Enabling Rotarians to advance world understanding, goodwill, and peace -- which 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

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

"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, 2006-07 Rotary Foundation Trustee Chair

Grants structure

Under the new grants structure model, the Foundation will provide two types of grants:

The first type 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

來的。地區將至多能以 40% 的地區指定用途基金(DDF)來支持這些獎助金。

第二類獎助金將提供機會給予參與較為策略性重點、持續的活動，而獲得基金會更多支援。這些獎助金資助於策略重點的範圍內之大計劃——一項由扶輪社社員所找出世界性優先的需求，在基金會所主導其資源下，使其有一種可維持的及可衡量的影響力。(基金保管委員會，將根據目前基金會計劃中，扶輪社員所顯示出的興趣及經驗而於其四月份的會議中決定 3 到 5 項重點的範圍，並將提交六月份的理事會中來加以考慮。)在這項獎助金之下，地區及扶輪社將會有以下兩種選項：

- 扶輪社及地區指定計劃
- 與策略合作關係組織機構之包裹式計劃

策略合作關係(SCR)

扶輪基金會與專門從事于重點的策略範圍內之一之機構成立策略合作關係。該策略合作關係 SCR 之機構將提供財務支援、學術上的專門知識和／或由扶輪基金會並包含扶輪社員的參與而共同規劃之計劃和活動所倡導的成果。除了增加扶輪基金會獎助金之影響外，這些合作關係將提供獲得扶輪事工之更多表彰的機會。

可分配之基金

一項可分配基金模式是設計用來簡化資金流程。

第一類的獎助金或綜合獎助金將依指定用途基金 DDF 之百分比來資助。在這三年之試驗時期，地區可運用至多 40% 其可用的指定用途基金 DDF 來支援小型當地及國際計劃和擴大的活動。這些百分比每年將會由保管委員會來加以重新檢討。

至於第二類獎助金，扶輪社和地區設計的獎助金計劃將可藉由一種世界基金 WF 配合指定用途基金 DDF 來支持；至於其他的取捨也將會被加以考慮。包裹式的獎助金計劃將藉由世界基金 WF、基金會盈利收入、由策略合作關係 SCR 組織機構的捐獻及其他資源的考量下，而以一種競爭性的程序來加以資助。為設計基金會之資源獲得最有效及策略性的使用以達到持續性之結果，這包裹式的獎助金計劃將不需要扶輪社及地區財務之支援。

執行

未來願景計劃將被執行於確認該過渡性草案的階段(將在四月定案)。在 2008-09 年度保管委員會將在全球挑選出大約 60 個依地理上分佈的地區來參與一個 2009 到 2012 年實施的試驗計劃。至於剩下的地區仍沿用目前的計劃及獎助金的程序。

扶輪社及地區將於 2008 年 4 月份保管委員會會議之後收到更多有關該計劃之資訊，同時有意願的地區請於 2008-09 年度中提出申請。

District Simplified Grants program. Districts will be able to use up to 40 percent of their District Designated Fund to support these grants.

The second type 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 in 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:

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

Strategic cooperative relationships

The Rotary Foundation will form strategic cooperative relationships 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.

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, Foundation earned income, 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.

未來願景常見的問題

Future Vision FAQ

國際扶輪 3520 地區 地區扶輪資訊編譯委員會主委 高永吉 PP Spencer 譯

未來願景計劃為扶輪基金會運作展現出一種前瞻性達成的途徑。扶輪社員已經提出許多有關扶輪基金會獎助金結構的改變將會影響他們扶輪社的人道及教育努力成果方面的問題。雖然有些答案要在 4 月保管委員會開會及在 6 月之國際扶輪理事會會後才會有答案，然而針對大家關心所提出的問題有下列常見問與答。

Q: 關於獎助金重點的範圍是什麼?

A: 保管委員在他們的 2008 年 4 月份會議中，將選擇 3 到 5 項範圍，而該範圍是在扶輪基金會基於包括了扶輪社員所顯示出的興趣及經驗為標準而來重點形成其獎助金之中。由於集中其努力的成果，基金會將能獲得可衡量的結果並直接與其使命而有所關聯。

Q: 我能如何資助一項無法成為重點範圍其中之一的活動?

A: 地區至多將會有 40% 的可運用之地區指定基金以綜合獎助金的方式來資助與扶輪基金會使命一致合法的任何類型的活動，它是與目前地區簡易獎助金計劃相類似。

Q: 當規劃未來願景向前邁進時，根除小兒麻痺等疾病計畫之情況將會是如何呢?

A: 作為國際扶輪的全體共同的計劃，根除小兒麻痺等疾病計畫仍然是組織最優先之項目。根除小兒麻痺等疾病仍將會照常運作。

Q: 有那些教育計劃可適用於新的模式呢? 是否有任何資金資助我們地區的每年度的團體研究交換? 我們地區是否繼續贊助大使獎學生?

A: 教育計劃將繼續在兩種獎助金之下存在，例如 GSE 團隊及大使獎學生皆可由二種方式來資助。如果他們職業及所選的學術的領域與一項重點範圍有關時，他們有資格從世界基金處獲得獎助金。地區也可從他們的綜合獎助金來選擇使用指定用途基金 DDF 以資助此類活動。

Q: 如何決定策略合作關係 SCR 組織機構?

A: 扶輪基金保管委員會選擇策略合作關係組織機構是基於在所選擇重點的範圍內，它們協助扶輪社及地區執行計劃的能力。

Q: 扶輪社員將以何種方式積極地參與包裹式獎助金計劃?

A: 包裹式獎助金將由扶輪基金會與策略合作關係 SCR 所共

The Future Vision Plan represents a forward-looking approach for the way that The Rotary Foundation operates. Rotarians have posed many questions about how the changes to the Foundation's grant structure will affect their club's humanitarian and educational efforts. Although all the answers won't be available until after the Trustee meeting in April and the June meeting of the RI Board, the following FAQ addresses some of the concerns expressed.

Q. What are the areas of focus for grants?

A. At their April 2008 meeting, the Foundation Trustees will choose three to five areas in which the Foundation will focus its grant making based on criteria that includes demonstrated Rotarian interest and experience. By concentrating its efforts, the Foundation will be able to achieve measurable outcomes that relate directly to its mission.

Q. How can I fund an activity that doesn't fall into one of the areas of focus?

A. Districts will have access to up to 40 percent of their available District Designated Funds (DDF) in the form of block grants to fund any type of eligible activity that aligns with The Rotary Foundation mission, similar to the current District Simplified Grants program.

Q. What will be the status of PolioPlus as plans for the Future Vision move forward?

A. As Rotary International's corporate project, PolioPlus will remain the organization's top priority. PolioPlus will continue to operate as is.

Q. Where do Educational Programs fit in the new model? Will there be funding for our district's annual Group Study Exchange? Will our district continue to sponsor Ambassadorial Scholars?

A. Educational Programs will exist under both grant types. Activities supported by Educational Programs such as GSE teams and Ambassadorial Scholars can be funded in two ways. If their vocation and chosen academic field relates to an area of focus, they may be eligible for grants from the World Fund. Districts can also elect to use District Designated Funds (DDF) from their block grants to support such activities.

Q. How will the organizations for strategic cooperative relationships (SCR) be determined?

A. The Trustees will select the organizations for SCRs based on their ability to help clubs and districts implement projects in the chosen areas of focus.

Q. In what ways will Rotarians be actively involved in packaged grant projects?

A. Packaged grants will be designed jointly by the

同規劃的。扶輪社員在此情況下有意願執行這些獎助金時可向扶輪基金會申請世界基金來支持。

Q: 扶輪社及地區是否可與未經策略合作關係 SCR 選中之組織機構共同合作?

A: 可以，扶輪社及地區是被鼓勵繼續發展與當地組織機構之合作關係來執行兩種獎助金之計劃。

Q: 我是一位牙醫師，我曾經用義工服務獎助金來支付到開發中國家內牙醫使命的旅費。請問扶輪基金會是否繼續支援這項旅費?

A: 因服務及企劃的使命的旅費之細節是否適用於新的模式仍未定案。預料個人類似這種活動之費用將會由地區之包裹獎助金來支付。

Q: 新的獎助金之名稱為何?

A: 扶輪基金保管委員會將在它們的 2008 年 4 月會議中來決定該獎助金種類之名稱。

Q: 地區如何被選定參與新的試驗計劃? 我們地區要如何申請參與?

A: 保管委員會將在 2008 年 4 月會議中決定地區參與試驗計劃之必要條件。所有地區將會被告知參與該計劃之申請手續並且將被鼓勵在 2008-09 年度當中申請。

Q: 如果我們地區被選為參與新的獎助金計劃，我們是否仍然可以申請配合獎助金嗎?

A: 不可以。所有試驗地區，必須完全承諾執行新獎助金模式並且不可以參與目前之計劃。

Q: 我們的扶輪社並沒有足夠資源可作大型國際性計劃，但是我們要每年做一些小型的配合獎助金計劃。請問世界基金是否可繼續支持這些小型計劃嗎?

A: 最低的獎助金額尚未決定，但是預期獎助金之金額將會大些。小型計劃可以藉由地區之綜合獎助金提供資金或扶輪社及地區將被鼓勵合作在重點範圍下去執行較大型之計劃將對社區有更長期及持續性的影響。當然了，扶輪社隨時可透過線上的 [ProjectLINK](#) 資料庫來尋求他社之合作。

Q: 並沒有提到限定用途現金捐獻至配合獎助金，是否限定用途現金捐獻仍然在新模式中可被接受?

A: 新型獎助金用限額現金捐獻之詳情尚未決定，我相信基金保管委員會將會在其 2008 年 4 月之會議中針對這一問題作一決定。

Q: 新獎助金模式聽起來蠻有希望的。我要如何在我的社內及地區來說服他人相信該計劃之實際的益處?

A: 鼓勵社員點選 [Future Vision Plan](#) 閱讀更多有關未來願景計劃之資訊。規劃一次扶輪社例會專門討論這項計劃，同時告訴他們你扶輪社將因它而受惠。請確認它將是貴地區未來地區年會或地區講習之議題。

Foundation and SCRs. Rotarians interested in implementing these grants on the ground can apply to the Foundation for World Fund support.

Q. Will clubs and districts be allowed to partner with organizations that have not been selected for SCRs?

A. Yes, clubs and districts are encouraged to continue developing cooperative relationships with local organizations to implement projects in both grant types.

Q. I'm a dentist who has used Volunteer Service Grants to cover travel expenses for dental missions in developing countries. Will the Foundation continue to support such trips?

A. The details of how travel for service and planning missions will fit in the new model have not been decided. It is anticipated that individuals will be able to participate in this kind of activity with funding from their districts' block grant.

Q. What are the names of the new grants?

A. The trustees will determine names of the grant types at their April 2008 meeting.

Q. How will districts be selected to participate in the pilot program? How can my district apply to participate?

A. The Trustees will determine the requirements for district participation in the pilot program at their April 2008 meeting. All districts will be notified regarding the application process and will be encouraged to apply during the 2008-09 year.

Q. If my district is selected to participate in the pilot program, can we still apply for a Matching Grant.

A. No. All pilot districts must be fully committed to the new grant models and cannot participate in the current programs.

Q. My club doesn't have the resources to do large international projects, but we try to do one small Matching Grant project each year. Will the World Fund continue to support smaller projects?

A. The minimum grant amount has not been determined, but it is expected that grants will be larger in size. Smaller projects can be funded through the district block grant, or clubs and districts are encouraged to join together to implement larger projects under the areas of focus that will have a more long-term and sustainable impact on the community. And of course, clubs can always continue to seek assistance from other clubs through the online [ProjectLINK](#) database.

Q. There is no mention of restricted cash contributions to Matching Grants. Will restricted cash contributions continue to be accepted in the new model?

A. The details of using restricted cash contributions in the new model have not been decided. The Trustees are expected to take a decision on this issue at their April 2008 meeting.

Q. The new grant models sound very promising. How can I convince others in my club and district of the positive benefits of the plan?

A. Encourage members to read more about the [Future Vision Plan](#). Plan a club meeting to discuss the plan and how your club can benefit from it. Make sure it's a topic at your district conference or district assembly.

保管委員會，國際扶輪理事會核准未來願景模式

Trustees, Board approve future vision models

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By Janis Young

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國際扶輪3520地區 地區扶輪資訊編譯委員會主委高永吉PP Spencer譯



扶輪基金計劃是幫助全球兒童實現他們的夢想。

在扶輪基金會及國際扶輪理事會，在其 10 月及 11 月的會議中核准了獎助金之結構及策略合作關係模式以及初步可分配基金模式。所有這些將形成扶輪基金會之未來願景計劃的核心。

反映出由基層社員、資深領導人及外面顧問群之心聲，這項新模式將會簡化扶輪基金的計劃，並專注於社員服務努力 2 的成果，在那裏他們將獲得最大的影響力。由於為要在 2012-13 年度全面實施之目標，該計劃將提供計劃選項，它們被設計去達成全球及當地目標，並轉移更多決定權予地區以增進基層的歸屬感。

新獎助金模式將提供二種類型的獎助金，第一類之獎助金將容許社員有更大的彈性去使用基金，以支援其廣泛服務的興趣及致力於其社區立既的需求。第二類之獎助金提供機會給社員參與重點及持續的活動並可獲得扶輪基金會及合作關係之支援以使該計劃得以成功及持久。

第一類型是給地區的綜合獎助金，這些獎助金將是以現行的地區簡易獎助金計劃為模型演進而來的，它將容許地區及扶輪社有更大彈性來完成其當地及國際計劃。地區將至多能以 40% 的指定用途基金 DDF 來支持這些獎助金。

第二類將資助在 3-5 項策略性重點範圍內更大、更持續性的計劃(基金保管委員會，將根據目前基金會計劃中，扶輪社員所顯示出的興趣及經驗而於其四月份的會議中決定這些範圍)。在這個模式下，扶輪社及地區將有兩種選項：扶輪社及地區指定之計劃以及策略合作關係組織機構之事前包裹式計劃。這些獎助金將增加資助之機會及支持之成果，因此將為扶輪基金會獲得更多的聲譽。

未來願景計劃將被執行於確認該過渡性草案的階段，該草案將於 2008 年 4 月定案。在 2008-09 年度保管委員會將挑選

Foundation programs help children around the world achieve their dreams.

At their October/November meetings, The Rotary Foundation Trustees and the RI Board approved the grant structure and strategic cooperative relationships models and a preliminary distributable funds model, all of which form the core of the Foundation's Future Vision Plan.

Reflecting input from grassroots Rotarians, senior leaders, and outside consultants, the new models simplify Foundation programs and focus Rotarian service efforts where they will have the greatest impact. With a goal of full implementation by 2012-13, the plan provides program options designed to achieve both global and local goals and increase the sense of ownership at the grassroots level by transferring more decisions to the districts.

The new grant model offers two types of grants. The first type allows Rotarians greater flexibility to use funds to support their broad service interests and address immediate needs in their communities. The second type offers opportunities to participate in focused and sustainable activities with greater support from the Foundation and cooperative relationships to make the projects more successful and sustainable.

The first type are block grants to districts, modeled after the current District Simplified Grants program, that will allow clubs and districts greater flexibility in carrying out local and international projects. Districts will be able to use up to 40 percent of their District Designated Fund to support these grants.

The second type will fund larger, more sustainable projects in one of the three to five strategic areas of focus (the Trustees will determine these areas at their April 2008 meeting, based on demonstrated Rotarian interest and experience in current Foundation programs). Under this model, clubs and districts will select from two options: club- and district-designed projects and prepackaged projects with strategic cooperative relationship organizations. These grants will enhance funding opportunities and support efforts that will gain more prominence for the Foundation.

The Future Vision Plan will be implemented in stages as identified in the draft transition plan that will be finalized in April 2008. In 2008-09, the Trustees will select

出大約 60 個依地理上分佈的地區來參與一個 2009 到 2012 年實施的試驗計劃。至於剩下的地區仍沿用目前的計劃及獎助金的程序。

扶輪基金保管委員會主委羅勃·司考特表達他對新模式的支
持，他稱讚在這未來願景服務計劃內會更策略性的邁向較具
體的服務。“對於每個人的每件事已經讓扶輪基金會努力去
瞭解到它的使命。而該新的結構會讓我們去建構於我們的實
力與瞭解到更多能維持的後果之上。”羅勃·司考特說。

“扶輪社員需要一個較簡單，更易接近的基金會，而它可以
充分利用我們的資源，”前國際扶輪社長及未來願景委員會
主委路易斯·季愛雅說。“而我們扶輪基金會新的模式都將
符合已制定的“五大考驗”的標準：1)簡單，2)成本效益，3)
顯著的社員參與，4)有一定水平之成果，及 5)與基金會的使
命一致。在 2017 年我們準備慶祝基金會第一世紀時，我們
是於我們的基金會逐步地轉型中。”

- 瞭解更多有關獎助之類型。
- 發覺策略合作關係如何增強扶輪的服務。
- 找出這些新的可分配基金模式對貴社及地區有何意義。
- 閱讀有關試驗計劃及轉換至新模式階段。
- 觀看由未來願景委員會委員史蒂夫·布朗來的一個錄影帶訊息。

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approximately 60 geographically dispersed districts to
participate in a pilot program for 2009-12. The remaining
districts will continue to use the current programs and grants
processes.

In expressing his support for the new models, Foundation
Trustee Chair Robert S. Scott applauded the more strategic
approach to service embodied in the Future Vision Plan.
“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,” Scott said.

“Rotarians have demanded a simpler, more accessible
Foundation that makes better use of our resources,” said
Past RI President and Future Vision Committee Chair Luis
V. Giay. “Our new models for The Rotary Foundation all
meet the established criteria of a ‘five-way test’: They are 1)
simple, 2) 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.”

- [Learn more about the grant types.](#)
- [Discover how strategic cooperative relationships will enhance Rotary service.](#)
- [Find out what the new distributable funds model will mean to your club and district .](#)
- [Read about the pilot program and the transition phase to the new models.](#)
- [Watch a video message from Steve Brown, member of the Future Vision committee .](#)

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新獎助金結構提供彈性及策略性的重點

New grant structure offers flexibility and strategic focus

作者：珍妮絲·楊

By Janis Young

國際扶輪新聞—2007年11月6日

Rotary International News - 6 November 2007

國際扶輪3520地區 地區扶輪資訊編譯委員會主委 高永吉 PP Spencer譯

在扶輪基金會新的獎助金結構之模式下，所有獎助金將歸類為兩種範疇中之一種，同時合併了教育及人道計劃。這些獎助金將允許扶輪社及地區可繼續支援其廣泛服務之興趣並致力於其社區立即的需求，當參與被證實有績效的計劃時能分配到更多資源於較大型及更具策略性重點的計劃。

第一類之獎助金，是由目前的地區簡易獎助金改良過來的，是由地區全權運用的綜合獎助金。設計去讓扶輪社及地區更有種歸屬感，這些獎助金同時提供在執行當地及國際服務計劃有更多的彈性，該新制最好能在 18 個月內完成。一項廣泛範圍的活動成為適合的，提供它們關聯並符合基金會的使命。扶輪社及地區可形成國際夥伴關係以便致力於其當地或國外社區之需求，同時也可與當地組織機構在社區計劃來加以合作。

雖然並不要求其繼續維持但我們鼓勵扶輪要考慮其計劃要有長期性之成果。“我們想像有些獎助金計劃在當地層級視同實驗性質，然而它能藉由更多重點的獎助金類型支助而擴展成為更大且更有持續性的成果，”保管委員同時也是未來願景委員會的委員朗·布頓說。

在試辦階段，地區使用可運用的地區指定用途基金來支援這綜合獎助金，讓地區充分支配它們的地區指定用途基金 DDF。有些計劃之範例，可能是資助當地識字計劃的書籍、一位到國外作義工服務的扶輪社員的旅費及一位當地大專學生學費的獎學金。

第二類型之獎助金將專注於及支援與三到五項策略性重點範圍之一有關的較大型及持續性的計劃(基金保管會將於 2008 年 4 月會議中定案)。所謂一個重點範圍被定義為

Under the new grant structure model for The Rotary Foundation, all grants will fall into one of two categories and consolidate educational and humanitarian programs. The grants will allow Rotary clubs and districts to continue to support their broad service interests and address immediate needs in their communities, while participating in projects with proven results that allocate greater resources to larger and more strategically focused projects.

The first type of grants, modeled after the current District Simplified Grants, are block grants managed by the districts. Designed to give clubs and districts a greater sense of ownership, these grants also provide more flexibility in carrying out local and international projects that will preferably be completed in less than 18 months. A broad scope of activities are eligible, provided they relate and conform to the Foundation's mission. Clubs and districts may form international partnerships to address needs in their local communities or abroad and partner with local organizations on community projects.

Although sustainability isn't required, clubs are encouraged to consider long-term outcomes in their plans. "We envision that some grant projects will serve as a laboratory at the local level for projects that could develop into larger and more sustainable efforts supported by the more focused grant types," said Trustee Ron Burton, a member of the Future Vision Committee.

In the pilot phase, districts will use available District Designated Fund allocations to support the block grants, giving districts more control over their DDF. Some examples of projects that might be funded include books for a local literacy project, travel expenses for a Rotarian providing volunteer service abroad, and tuition costs for a scholarship for a local college student.

The second type of grants are more focused and support larger, more sustainable projects related to one of the three to five strategic areas of focus (to be established by the Foundation Trustees at their April 2008 meeting). An area of focus is defined as a priority world need identified by Rotarians

一項全世界優先的需求，而該項需求是由扶輪社員所找出並在基金會指導其資源下並要有一種持續性及可衡量的影響，而該影響則是該組織之財力及義工資源的槓杆作用。根據扶輪社員所顯示出的興趣及經驗，在這些重點範圍將提供一種長期的承諾並要有持續受惠者結果的可能性。這個獎助金類型將不包括目前全體共同的計劃，根除小兒麻痺等疾病計畫，或任何未來全體共同的計劃；全體共同的計劃將會是獨立的同時是國際扶輪及扶輪基金會的最優先的計劃。

扶輪社及地區可支持他們所選擇的一個重點範圍計劃而申請為這類型獎助金的一位國際夥伴的扶輪社或地區。或者他們也可申請基金會所設計的一種與策略合作關係組織機構所制定的獎助金。同樣的在一項努力考量團體研究交換及大使獎學金更具有種策略方式之下，該項獎助金也有可能資助與重點範圍相關專業或研究領域的參與者。至於對活動及計劃特定的策略仍然將由四月的保管委員會來研擬及評估。

“這些大型獎助金是規劃更具策略性使用扶輪基金會的資源，同時致力於扶輪社員的興趣，”保管委員，未來願懷委員會委員田中說。“藉由建構在我們的實力上並集中我們組織的努力，我們可以作得更具影響力，並可吸引有潛力的策略合作關係組織機構新的興趣，因此可以大幅提升我們基金會的公共形象”。

除了這些重點範圍外，其他有關獎助金結構之細節仍然需要保管委員會來加以澄清。“許多問題仍然需要答案，有關這些獎助金類型要如何申請、核准、分配及報告，”保管委員會主委當選人強納生·馬奇約伯，他是未來願懷委員會副主委表示。“保管委員會已要求管理工作委員會列出新模型的管理工作需求之概要。”

- 週一：閱讀和評估新的未來願懷模式
- 週三：發覺策略合作關係如何增強扶輪的服務。
- 週四：找出這些新的可分配基金模式對貴社及地區有何意義。
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我們歡迎你的回饋信息。請將你們有關本文的問題及意見寄到 spo@rotary.org。

in which the Foundation is directing its resources to have a sustainable and measurable impact that leverages the organization's financial and volunteer resources. Based on demonstrated Rotarian interest and experience, these areas of focus will offer a long-term commitment with potential for sustainable beneficiary outcomes. This grant type does not include the current corporate project, PolioPlus, or any future one; corporate projects will be independent and the highest priority of Rotary International and The Rotary Foundation.

Clubs and districts may apply for this type of grant with an international partner, club, or district to support a focus area project of their choice. Or they may apply for a grant established with a strategic cooperative relationship organization designated by the Foundation. In an effort to also consider Group Study Exchange and Ambassadorial Scholarships in a more strategic way, it is possible that the grants will fund participants whose professional or study fields relate to the areas of focus. Specific strategies for activities and projects are still being developed for review by the Trustees in April.

"These larger grants are designed to use Rotary Foundation resources more strategically and to address Rotarians' interests," said Trustee Sakuji Tanaka, member of the Future Vision Committee. "By building on our strengths and concentrating our organizational efforts, we can make far more impact, attract new interest from potential strategic cooperative relationship organizations, and greatly enhance our Foundation's public image."

In addition to the areas of focus, other details about the grant structure require further clarification from the Trustees. "Many questions still need to be answered on how to apply, approve, disburse, and report on these grant types," said Trustee Chair-elect Jonathan Majiyagbe, who is vice chair of the Future Vision Committee. "The Trustees have asked the Stewardship Committee to outline the stewardship needs of the new model."

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策略性合作關係增強服務的成果

Strategic cooperative relationships will enhance service efforts

作者：珍妮絲·楊

By Janis Young

國際扶輪新聞—2007年11月7日

Rotary International News - 7 November 2007

國際扶輪3520地區 地區扶輪資訊編譯委員會主委 高永吉 PP Spencer譯

扶輪基金會未來願景計劃的一項主要的特徵是牽涉到要去與組織機構成立策略合作關係(SCR)，而該組織機構要能協助基金會完成其在每一重點範圍之使命及目標。在基金保管委員會及國際扶輪理事會所採納之策略合作關係(SCR) 模式之下，扶輪基金會將策略性地與一些組織機構合作，而該組織機構特別是要在保管委員會 4 月份會議中所選擇並於六月份的理事會所認可的策略性重點範圍中之一。

重點範圍被定義為一種由扶輪社員所尋找出來的全球優先之需求，並且是在扶輪基金會所支配它的資源當中，而能有由該組織機構的財務和義工資源感原理而來的一種持續性及可衡量的影響力。策略合作關係 SCR 機構將被期盼提供財務的支援、技術專業指導或對計劃和活動倡導努力的成果，這些計劃及活動是由扶輪基金會與包括了扶輪社員的參與所共同規劃的。

扶輪基金保管委員會預期與其他組織機構合作來支持基金會之計劃及活動，將會有顯著的好處。我們預期該合作關係將促進一種全面的邁向提供全球扶輪社員在計劃及活動持續性之成果。策略合作關係 SCR 模式提供無限的機會去散播扶輪社員服務重點的訊息。

策略合作關係 SCR 模式將專注一種合作的方法於計劃財務的、技術的及扶輪社員、扶輪社、地區及其他扶輪單位所牽涉的資源。最後的成果將提供兩個組織機構—扶輪社及策略合作關係 SCR 機構所服務的社區一種顯著的益處。

“就如同我們在根除全球小兒麻痺等疾病運動的夥伴，策略合作關係 SCR 將使扶輪基金會能致力於較大的需求，” 扶輪基金保管委員會主委羅勃·司考特說。“我們期望與組織機構合作，而那些組織機構要是確認他們全球性工作是在我們的重點範圍內，並且能貢獻財務的、技術的或提倡資源。”

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我們歡迎你的回饋信息。請將你們有關本文的問題及意見寄到 spo@rotary.org。

A key feature of The Rotary Foundation's Future Vision Plan involves forming strategic cooperative relationships (SCR) with organizations that can help the Foundation accomplish its mission and the goals of each area of focus. Under the SCR model adopted by the Foundation Trustees and RI Board, the Foundation will strategically cooperate with organizations that specialize in one of strategic areas of focus to be selected at the April Trustees meeting and endorsed at the June Board meeting.

Areas of focus are defined as a priority world need, identified by Rotarians, in which the Foundation is directing its resources to have a sustainable and measurable impact that leverages the organization's financial and volunteer resources. The SCR organizations are expected to provide financial support, technical expertise, or advocacy efforts in projects and activities that are designed jointly with the Foundation and include Rotarian participation.

The Trustees anticipate significant benefits in cooperating with other organizations to support the projects and activities of the Foundation. The relationship is expected to promote a holistic approach in providing sustainable outcomes in projects and activities of Rotarians worldwide. The SCR model provides unlimited opportunities to spread the message of Rotarians' service focus.

The SCR model will focus on a collaborative approach in projects with financial, technical, and advocacy resources involving Rotarians, clubs, districts, and other Rotary entities. The final outcomes provide a significant benefit to the communities that both organizations- Rotary and the strategic cooperative relationship organization- are serving.

"Like our partnership in the Global Polio Eradication Initiative, strategic cooperative relationships will enable The Rotary Foundation to address larger needs," said Trustee Chair Robert S. Scott. "We expect to partner with organizations that are recognized worldwide for their work in our areas of focus and who can contribute financial, technical, or advocacy resources."

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新的基金模式簡化了扶輪社及地區的流程

New funding model simplifies process for clubs and districts

作者：珍妮絲·楊

By Janis Young

國際扶輪新聞報—2007年11月8日

Rotary International News - 8 November 2007

國際扶輪3520地區 地區扶輪資訊編譯委員會主委 高永吉 PP Spencer譯

為回應新的扶輪基金會的獎助金結構，未來願景委員會建議一項初步可分配的基金模式，該模式將於10月/11月份兩個會議當中，先被基金保管委員會通過並隨後由國際扶輪理事會來加以審查。

在這新的模式下，綜合獎助金將被地區指定用途基金 DDF 以百分比的方式來撥配。在(2009-12)三年期間試驗階段，地區可運用至多以 40%的地區指定用途基金 DDF 來支援小型當地及國際的計劃，如此將使地區有較大之彈性運用。這項百分比將由保管委員會每年來加以審查。**分享制度**將繼續以目前的方式來運作，就是 50%的地區捐獻款給至世界基金 (World Fund)及 50%的地區指定用途基金 DDF。

扶輪社及地區一所設計在重點範圍內的之獎助金(由扶輪社員所找出的世界優先之需求，由基金會引用其資源將會有種持續性及可衡量之影響力，而該影響力是由該組織機構之財務及義工資源的槓桿作用而來的)將藉由一種配合地區指定用途基金 DDF 之世界基金的支持。由基金會及其策略合作關係或其他策略合作關係 SCRs (該機構專門從事於策略性重點範圍中之一，並要與基金會建立一種關係)所資助之獎助金，將由世界基金、基金會盈利收入、策略合作關係 SCRs 的捐獻、以及其他未來願景委員會及保管委員正進一步研究的資源。保管委員會展望該基金會-SCR 之聯合獎助金在達到持續的結果這方面將是最有效及策略性運用基金會的資源。就其本身而言，這些獎助金將由完全由世界基金透過有競爭的程序來加以資助而不需要由扶輪社及地區的財務來支援。

“這種模式將大為簡化我們目前資助的機制，同時給地區在使用其捐款時有較佳的通路及彈性，”保管委員朗·布頓說。

“引用策略合作關係，我們將增加在我們的重點範圍內大型計劃可使用基金的程度，同時可繼續提共一種讓扶輪社及地區在其有意的服務方面能完全地運用更多的資源的選擇。”

In response to the new Rotary Foundation grant structure, the Future Vision Committee recommended a preliminary distributable funds model that was approved by the Foundation Trustees and then reviewed by the RI Board during the October/November meetings of both boards.

Under the new model, block grants will be funded by a percentage of District Designated Fund allocations. During the three-year pilot phase (2009-12), districts may use up to 40 percent of their available DDF to support smaller local and international projects, offering districts a great deal of flexibility. This percentage will be reviewed annually by the Trustees. **SHARE** will continue operating in its current structure, with 50 percent of district contributions going to the World Fund and 50 percent to DDF.

Club- and district-designed grants in the areas of focus (priority world needs identified by Rotarians in which the Foundation is directing its resources to have a sustainable and measurable impact that leverages the organization's financial and volunteer resources) are expected to be supported by a World Fund match of DDF. Grants offered by the Foundation and its strategic cooperative relationships, or SCRs (organizations that specialize in one of the strategic areas of focus and have an established relationship with the Foundation), will be supported by the World Fund, Foundation-earned income, contributions from SCRs, and other sources being studied further by the Future Vision Committee and Trustees. The Trustees envision the joint Foundation-SCR grants as the most effective and strategic use of Foundation resources in achieving sustainable outcomes. As such, these grants would be funded completely by the World Fund through a competitive process that does not require club and district financial support.

"This model greatly simplifies our current funding mechanism and gives districts better access and flexibility in using their contributions," said Trustee Ron Burton. "With strategic cooperative relationships, we also increase the level of funding available for large-scale projects in our areas of focus and continue to provide a choice to clubs and districts in their service interests with more resources at their fingertips."

三年的試驗計劃用來測試新的獎助金結構

Three-year pilot program to test new grant structure

作者：珍妮絲·楊

By Janis Young

國際扶輪新聞—2007年11月9日

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國際扶輪 3520 地區 地區扶輪資訊編譯委員會主委 高永吉 PP Spencer 譯

為確保新的模式為正在逐漸發展及資助的獎助金能符合未來願景計劃之目標，扶輪基金保管委員會及國際扶輪理事會核准了一項開始於 2009 年 7 月 1 日三年預備的試驗計劃。保管委員會將在其 2008 年 4 月份會議中通過過渡時期方案及試驗計劃。扶輪社及地區將於最近的幾個月內收到有關該試驗計劃更多資訊，同時地區如有意考慮參與該試驗計劃，將於 2008-09 年度被徵求提出申請。

保管委員會將在全球將選擇 60 個以地理分佈之地區來參與。在試驗階段，基金會將以雙向並進方式，試驗地區在新的模式指導方針下運作，至於其他大多數未參與的地區，它們在參與基金會計劃似乎沒有多大改變。

“這項過渡試驗的階段將讓我們去找尋並且使事先並未預期議題有好的結果”保管委員會主委當選人同時也是未來願景委員會副主委的喬納森·馬奇約伯說。“同時我們也可運用此一時期來開發與 530 個地區一同工作所需的策略合作關係。”這過渡時期同時也可以給扶輪社員時間來調適許多正在進行之改變。

前國際扶輪社長路易士·季愛雅，同時也是說未來願景委員會主委，承認這重大變革也許對某些扶輪社員難以很迅速適應。“我們扶輪的文化是緩慢改變，因此需要時間，”季愛雅說，“但對基金會的健全而言改革是絕對有必要的。當扶輪社員見證到他們的工作可衡量的成果時，我深信對我們的基金會最終我們將體驗出一種更寬廣及更深切的承諾。

- 週一：閱讀和評估新的未來願景模式
- 週三：發覺策略合作關係如何增強扶輪的服務。
- 週四：找出這些新的可分配基金模式對貴社及地區有何意義。
- 週五：閱讀有關試驗計劃及轉換至新模式階段。
- 觀看由未來願景委員會委員史蒂夫·布朗來的一個錄影帶訊息。

我們歡迎你的回饋信息。請將你們有關本文的問題及意見寄到 spo@rotary.org。

To ensure that the new models for developing and funding grants meet the Future Vision Plan objectives, the Rotary Foundation Trustees and the RI Board approved a preliminary three-year pilot program that begins 1 July 2009. The Trustees will finalize the transition plan and pilot program at their April 2008 meeting. Clubs and districts will receive more information about the program in the coming months, and districts interested in being considered for the pilot will be invited to submit applications during the 2008-09 Rotary year.

The Trustees will select approximately 60 geographically dispersed districts to participate. During the pilot phase, the Foundation will operate along parallel tracks, with the pilot districts following the guidelines for the new models and the remaining majority of districts seeing little, if any, change in the way they participate in Foundation programs.

"This transitional pilot stage will allow us to identify and work out any issues that we might not have anticipated," said Trustee Chair-elect Jonathan Majiyagbe, who is vice chair of the Future Vision Committee. "We can also use this period to develop strategic cooperative relationships needed to work with 530 districts." The transitional period will also give Rotarians time to adjust to the many changes underway.

Past RI President Luis V. Giay, who chairs the committee, recognized that the magnitude of change involved may be difficult for some Rotarians to accept quickly. "Our Rotary culture is slow to change and must be given time," Giay said, "but change is imperative for our Foundation's health. I believe that ultimately we will experience a broader and deeper commitment to our Foundation as Rotarians see the measurable outcomes of their work."

- [Monday: Read an overview of the new future vision models.](#)
- [Wednesday: Discover how strategic cooperative relationships will enhance Rotary service.](#)
- [Thursday: Find out what the new distributable funds model will mean to your club and district.](#)
- [Friday: Learn about the pilot program and the transition phase to the new models.](#)
- [Watch a video message from Steve Brown, member of the Future Vision committee.](#)

We welcome your feedback. Please send all questions and comments regarding this article to spo@rotary.org.
