

Future Vision

Future Vision overview

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, 2007-08 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 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.

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