



# Talking Points: Future Vision Plan

In 2005, The Rotary Foundation initiated a long-range plan referred to as Future Vision to prepare for its second century of service. The plan is designed to maximize the impact of Rotarian contributions by supporting larger-scale sustainable service projects that achieve greater public recognition. By simplifying its menu of global and local service opportunities and administrative processes, the Foundation is working to encourage greater participation at the club and district levels, strengthen members' sense of ownership of the Foundation's resources, and increase our membership and donor base.

## The Rotary Foundation's new grant model under the Future Vision Plan will enhance TRF's capacity to support district and club humanitarian and educational projects.

- The Foundation recognized that it could better serve clubs and districts by streamlining its operations to improve efficiency and achieve a greater impact within Rotary's six areas of focus.

## The six areas of focus provide direction for developing service projects, improving capacity to address needs, and showing the world that Rotary is a global leader in humanitarian service.

- The six areas of focus are: peace and conflict prevention/resolution, disease prevention and treatment, water and sanitation, maternal and child health, basic education and literacy, and economic and community development.
- These areas of focus represent issues in which Rotarians have demonstrated significant previous interest and activity, which will foster positive member engagement and project success.
- Rotary will have greater impact and support more effective and sustainable humanitarian projects with the new model. In 2007, the Foundation was spending 20 percent of its annual program budget on larger, high-impact grants and 80 percent on short-term projects with less impact. Future Vision reverses these percentages to support more high quality, sustainable projects that make a greater impact on communities worldwide, helping more people and enhancing Rotary's public image.
- All districts will begin using the new grant model on 1 July 2013. Transition timelines are currently available for clubs and districts.

## The new grant model offers many benefits to clubs and districts.

- **Greater awareness and engagement** – The clarity and simplification of district grants make it easier for clubs to participate. Pilot districts report increased involvement of clubs in Foundation-sponsored projects.
- **Greater scale** – Larger grants and the emphasis on sustainability result in more projects that provide longer lasting benefits to more people.
- **Higher profile** – Being able to measure projects' effectiveness allows the Foundation to report quantifiable results. Shared with the world, these results will enhance Rotary's public image locally and internationally.
- **Greater enthusiasm and contributions** – Excitement about the enhanced opportunities offered by the new grant model has generated a renewed interest in giving and a greater sense of ownership among pilot districts.
- **Improved stewardship and accountability** – More streamlined reporting and a Memorandum of Understanding that clearly explains requirements, roles, and responsibilities will contribute to better overall compliance and transparency in grant management.
- **Greater efficiency** – The entire grant process is more efficient and more transparent. And payments are processed faster!
- **Greater club and district ownership** – Districts can now access more of their District Designated Fund for district grants, which provides more funding for projects and more control over DDF. Clubs and districts can determine their own level of involvement in global grants through projects with international partners or by applying for a packaged grant with one of our strategic partners.

- **Global grant scholarships** – Clubs and districts can select their global grant scholars in a timelier manner. And the sponsor's cost is lower because each global grant scholarship receives a World Fund match.
- **Vocational Training Teams** – Vocational Training Teams mark a return to the original vocational objectives of the Group Study Exchange program, while achieving more focused, measurable, and sustainable outcomes and retaining the opportunities to build lasting personal relationships and promote cross-cultural understanding.

**The new grant model offers a simplified, more flexible approach, while encompassing a broad range of grant-supported activities.**

- **District grants** are block grants that allow clubs and districts to address immediate needs in their communities and abroad.
- **Global grants** fund large international humanitarian projects, vocational training teams, and scholarships – all of which are intended to yield sustainable, measurable outcomes in one or more of the areas of focus.
- **Packaged grants** maximize resources by leveraging the financial resources, technical expertise, and/or advocacy provided by The Rotary Foundation's strategic partners.
- Grant options for **PolioPlus**, **Peace Scholars**, and **Disaster Recovery** will continue under the new grant model.

**Under Future Vision, the focus is on sustainable projects and greater impact. "Sustainability" means that benefits continue to flow after the grant money is spent.**

- Sustainability is defined as a project's capacity to maintain long-term outcomes that continue to serve a community's ongoing needs after grant funds have been expended.
- Sustainable projects offer enduring value and a greater return on Rotary's investment of money and volunteer hours.
- A sustainable project typically achieves significant buy-in from the local community, with mechanisms in place for training and exchanging information so the community can maintain results and address problems after the Rotary club's involvement has ended.

**Report Card: The success of the new grant model will be measured over time.**

- Success can be measured by increased Rotarian participation in Foundation-supported activities, increased giving to the Foundation, greater engagement of clubs, and more media coverage of Foundation-sponsored projects.
- The evaluation process will further measure success by providing data on the number of people who benefit from Foundation grants and the sustainability of projects.
- Rotarian input from the Future Vision pilot already is being used to improve the new grant model. Pilot districts have indicated satisfaction with many aspects of the plan (such as the simplified online application) and an increase in the sense of ownership at club and district levels.