

# **The Rotary Foundation's Future Vision Plan**

**Preparing for TRF's  
Second Century of Service**

**2008 Rotary International Institute  
Los Angeles, CA, USA**



# Opening Remarks

- Why the Future Vision Plan?
  - Preparing for TRF's Centennial
  - Immense growth
  - Relevance in philanthropic world
  - Evolving organization
  - Rotarian feedback
  - Sustainability, significance, simplification



# Rotarians' Interests— Surveys & Focus Groups

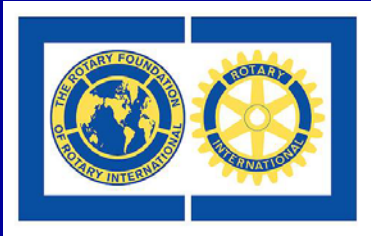
- Simplify and focus program menu
- Balance—global and local
- Focus on significant and sustainable outcomes
- Increase sense of ownership—shifting decisions locally
- Be recognized as first-choice partner for global projects



# TRF Mission & Motto

...to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty

Doing Good in the World



# 2017 Vision

## A Premier Foundation

- Celebrate Centennial
- Polio eradicated
- Inundated with requests for strategic partnerships with NGO's and others
- Nobel Peace Prize
- Authority on many issues (e.g. water)
- Top 50 Foundation
- High Charity Navigator Rating
- PF value = \$800M
- APF 12 yrs of growth ~ \$153M
- Increased and diversified giving
- Less transactions, fewer staff, efficient and effective
- Active in fundraising



# FV “Five Way Test”

- Simple
- Cost Effective
- Significant Rotarian Involvement
- Evidence of Sustainable Outcomes
- Consistent with Mission



# Areas of Focus

to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty



# Areas of Focus

## Goodwill and Peace

1. *Peace and Conflict Prevention/Resolution*

## Health

2. *Disease Prevention and Treatment*
3. *Water and Sanitation*
4. *Maternal and Child Health*

## Education

5. *Basic Education and Literacy*

## Alleviation of Poverty

6. *Economic and Community Development*

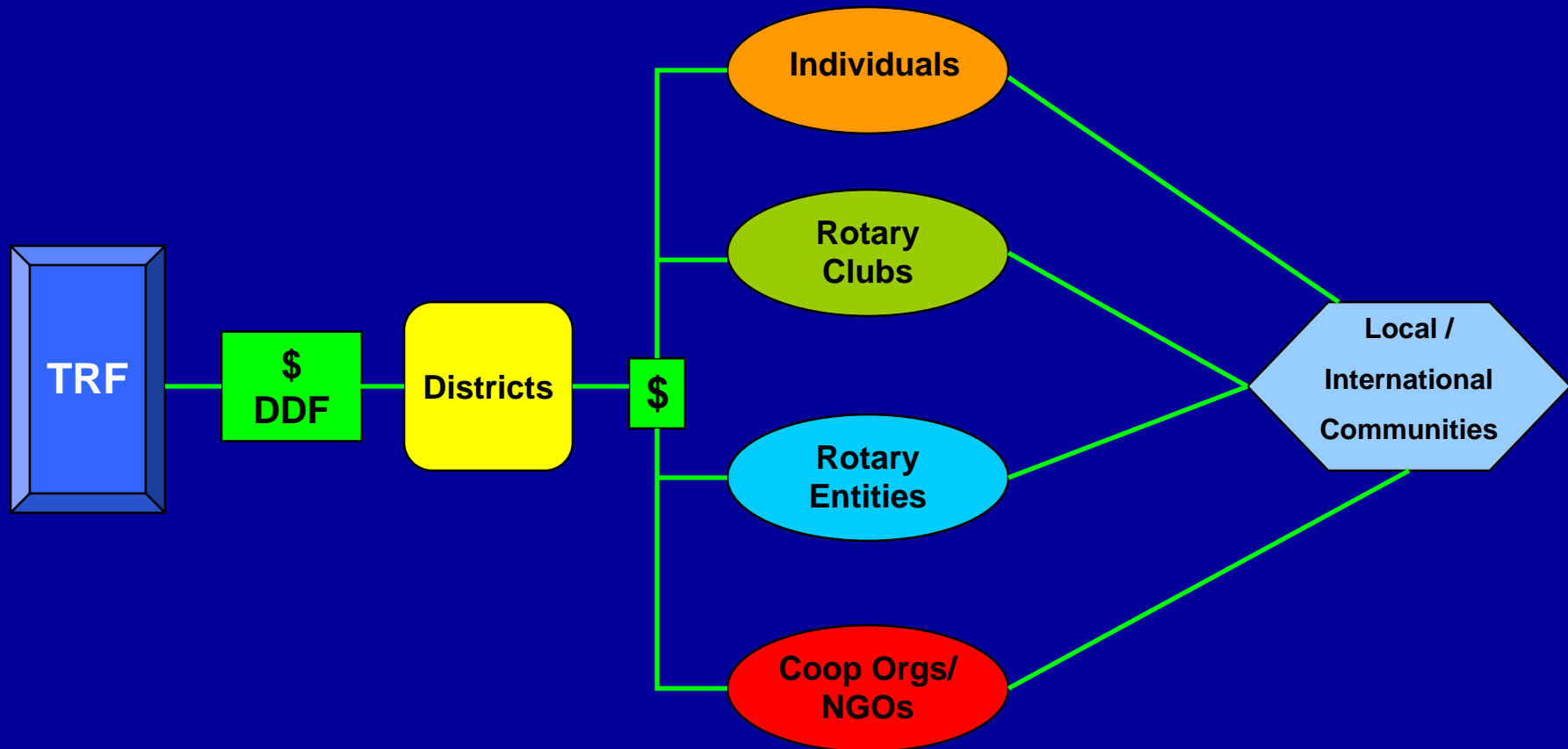


# Grant Names

- A. Rotary Foundation District Grants
- B. Rotary Foundation Global Grants



# District Grants





# Global Grants

## Areas of Focus



**TRF/SP Packaged Grants**

**Club & District Grants**



# Transition Plan Summary by Current Program

## District Grants

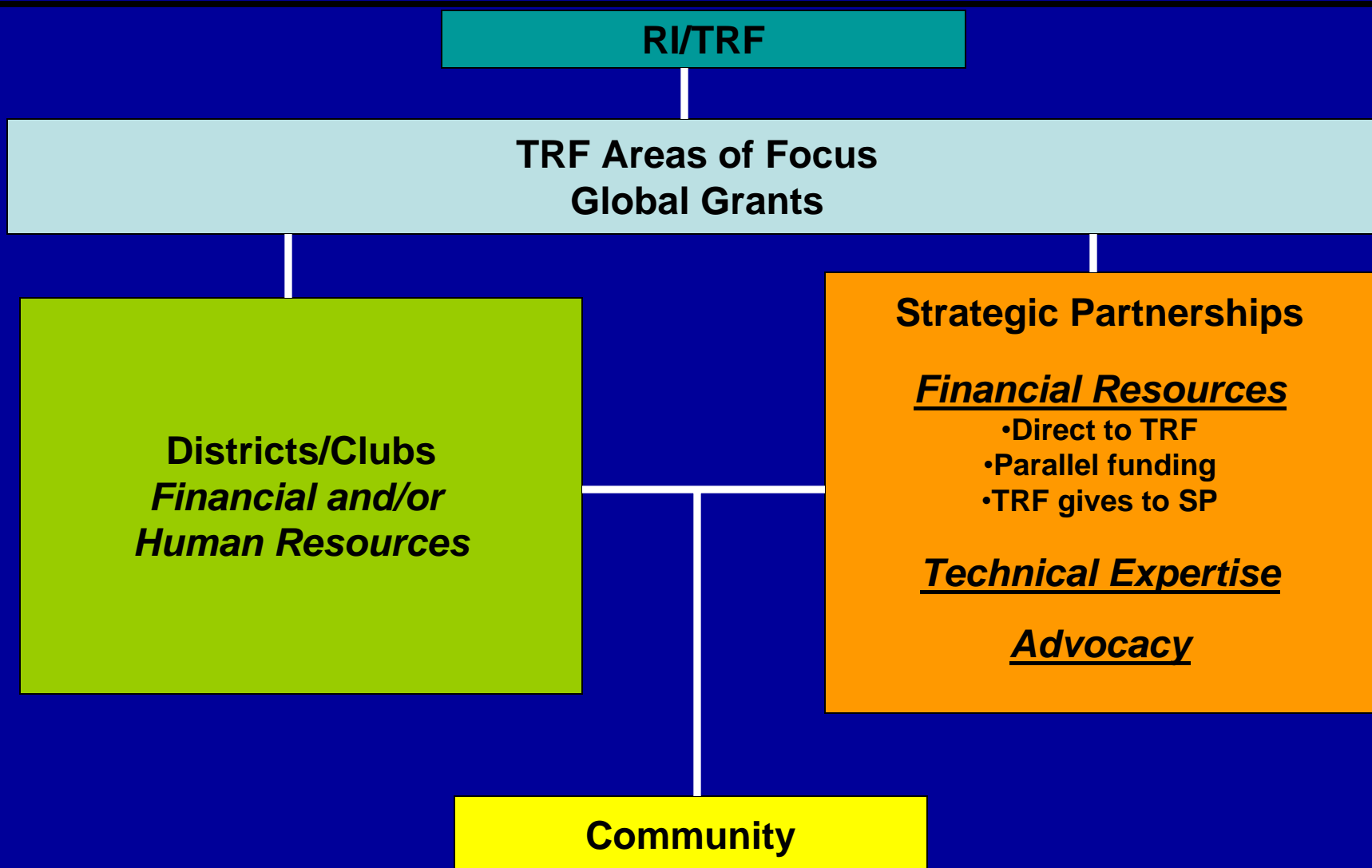
- Rotary Grants for University Teachers
- Ambassadorial Scholarships (Cultural, Multi-Year, Academic year)
- Group Study Exchange
- Regional Scholar Seminar Grants
- District Simplified Grants
- Smaller Matching Grants
- Volunteer Service Grants
- Disaster Recovery

## Global Grants

- Academic-Year Ambassadorial Scholarships
- Group Study Exchange
- Larger Matching Grants
- 3-H grants
- Rotary Centers for International Studies

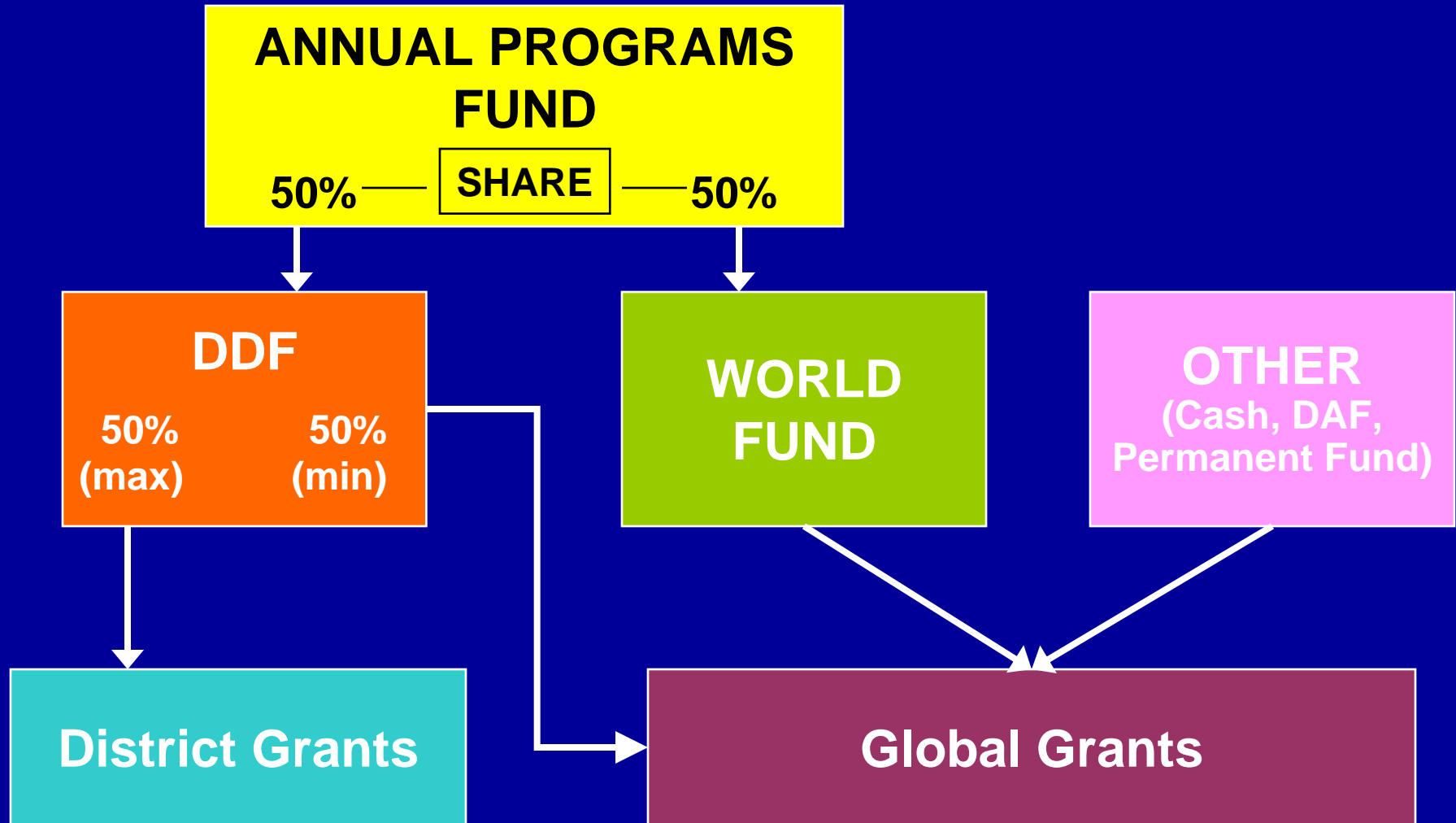


# Strategic Partnership Model





# Distributable Funds





# Timeline

2008-09  
2009-10

- Communicate and promote to Rotary world
- Select, train & qualify up to 100 pilot districts
- Educate DGEs, DRFCs, RRFCs on new grant model

**Planning & Preparation**

2010-11

- Begin awarding grants to pilot districts
- Update on pilot to Trustees

**1**

**yr**

2011-12

- Continue awarding grants to pilot districts
- Evaluation reported to Trustees
- Final pilot evaluation to Trustees
- Phase out some programs

**2**

**yr**

2012-13

- Continue awarding grants to pilot districts
- Final pilot evaluation
- Adjust grant model
- Qualify and train all districts

**3**

**yr**

2013-14

- Begin awarding new grants worldwide
- Phase out remaining programs

**full rollout**



# Pilot Application Process

- All Districts worldwide invited to apply
- District application process complete June 2009
- Online process
- Transparency regarding
  - Selection Criteria
  - Current Programs in New Structure
  - Training and Qualification
  - Pros and Cons
- Agreement of DG, DGE, DGN, DRFC
- Agreement of  $\frac{2}{3}$  clubs in districts



# Selection Criteria

- Diverse cross-section
- Grant activity
- Reporting
- Stewardship
- Election/appointment disputes
- Effective committees
- No probation/suspension



# Training and Qualification

- Training within RI training cycle 2009-10
- Involve DGEs, DRFCs, RRFCs
- TRF news, updates, publications
- Qualification process is simple
- Every district becomes qualified
- Districts qualify Rotary clubs



# Phase Out Plan

- Operate two grants structures in parallel during pilot
- Six current award types available for last time worldwide in 2010-11
- Remaining, old grant types available for last time in 2012-13
- Pilot districts close out old grants by end of 2013-14, first year new structure global
- Non-pilot district close out old grants by end of 2018-19, six years later.



# Opportunities & Challenges

## Opportunities for Pilot Districts

- Provide input into the refinement of new structure
- Receive more specialized TRF support and service
- Access to more funds for use at district's discretion

## Challenges for Pilot districts

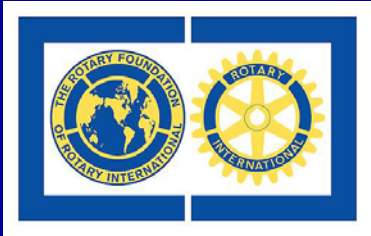
- Agree to 3-year commitment with need for flexibility as rules are defined and unanticipated issues arise
- “Super user” districts may have less access to funds for some international grant activities



# The Opportunity

Rotarians will be inspired to broaden their commitment to their Foundation given simplified models for

1. Projects and activities with strategically focused choices
2. Funding
3. Administration



# Closing

- Simplify, align outcomes, increase ownership, and resource the goals
- “Enable Rotarians to advance world understanding, goodwill, and peace” *TRF Mission Statement*
- “I believe we stand at a moment of unequalled opportunity” *Bill Gates in Newsweek*