

# Future Vision Plan Update

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Good afternoon to the class of 2010-11.

You and I will long remember 1 July 2010. It will mark the beginning of your 12-month term as district governor and your introduction to a world of abundant Rotary opportunity. For our Rotary Foundation, it is also the launch day for the three-year Future Vision pilot — Day One of a journey to a more effective, more efficient Foundation, a journey to a Foundation better organized for global service.

This is a time of transition for The Rotary Foundation. It is totally due to Rotarians' phenomenal support of the Foundation over the decades. In the last 60 years, Ambassadorial Scholarships have financed more than 39,000 scholars from over 115 countries. In the last 40 years, Rotarians have implemented over 29,000 Matching Grant projects. Nearly 14,000 teams have traveled abroad through Group Study Exchange.

Yet, despite these impressive numbers, the humanitarian work that Rotarians have done in the past has never been enough and can never be enough if we continue as we have in the past. Let me illustrate with this story.

In 1969, in the elation following the *Apollo* moon landing by American astronauts, America's premier airline announced it was accepting reservations for the first commercial flight to the moon. Takeoff was scheduled for the year 2000. Former U.S. President Ronald Reagan was among those who immediately booked a seat. The name of the airline? Pan American, or Pan Am, America's flagship international airline — until its collapse on 4 December 1991. The moral of the story? Grand plans are great, but the future unfolds one day, one decision at a time. And if you can't change, can't adapt along the way, you'll never reach your ultimate destination.

Sadly, The Rotary Foundation and the grant-making models of the 20th century belong in the past. They can no longer get us to our ultimate 21st century destination.

So, the Trustees looked beyond Rotary's successes in the past to determine how the Foundation should evolve strategically and obtain more pointed results. Thus, the Future Vision Plan. The plan calls for a three-year testing period so that our theories can be put into practice and we can refine our procedures based on performance during the pilot period. After significant planning and preparation, we are ready to write this new chapter of the Foundation's life.

The Trustees have selected 100 districts from 74 countries on six continents to participate in the Future Vision pilot. Over half of the world's Rotary districts applied to be a part of the pilot. Narrowing the number of applicants to a mere 100 representative districts was a difficult process. The Foundation established specific selection criteria that included geographic location, membership size, past record of grant sponsorship, annual giving, and stewardship. The final group of pilot participants represents a nearly perfect microcosm of Rotary, ensuring that a diverse range of issues is addressed during the pilot and that lessons learned can be easily replicated once the new structure is opened up to all districts. The governors-elect and the district Rotary Foundation chairs of the pilot districts, as well as all the regional Rotary Foundation coordinators, have just completed a two-day intense training in the Future Vision Plan and their responsibilities under this new grant structure.

For these 100 pilot districts, this speech summarizes what they learned in that two-day training. For you 431 districts that will continue to follow the current grant structure, this speech is intended to keep you engaged and informed during the evolution of the Future Vision Plan.

Now that the Foundation has selected the pilot participants, what will your relationship with the Foundation look like over the next three years? Starting with the 2010-11 program year, pilot districts will adhere to the new grant structure, and nonpilot districts will continue their activity in traditional Foundation programs. Consequently, the Foundation will operate two grant-making models in parallel for the three years of the pilot.

For those of you concerned that following two separate models will disrupt long-established partnerships, let me assure you that there will still be opportunities for pilot and nonpilot districts to interact during the pilot period. This interaction can take the form of smaller-scale activities through the use of Rotary Foundation District Grants sponsored by the pilot districts or District Simplified Grants sponsored by nonpilot districts.

In 2013-14, the entire Rotary world will operate under the new grant structure. However, I encourage nonpilot districts not to wait until then to fully transition into the new grant structure. I invite the leaders of nonpilot districts to sign up for the *Future Vision Pilot News* newsletter and to regularly consult the RI website for the most current and complete information about the new grant-making model and the Future Vision pilot. I also encourage nonpilot governors-elect to take the unique opportunity offered by the present International Assembly to forge relationships with your classmates who will participate in the pilot, so that you can learn firsthand of their experiences working within the new model. Finally, I ask you to please consider aligning your current program activities to the tenets of the Future Vision Plan. It is never too early to focus on the Future Vision Plan — to support sustainable activities that support the goals of the six areas of focus:

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

By doing so now, you will better prepare your districts for the eventual transition into the new grant structure in 2013-14.

The grant-making model that will be tested during the pilot phase is composed of two principal grant types: Rotary Foundation Global Grants and Rotary Foundation District Grants. This streamlined program menu upholds one of the Future Vision Plan's primary objectives of simplification. It further represents an important philosophical shift in the Foundation's support of Rotarian service.

The future grant-making model de-emphasizes particular programs, such as Ambassadorial Scholarships and Matching Grants, and encourages instead the development of integrated activities that target the most pressing needs of our world, such as schooling for children, freedom from disease, economic development, safe motherhood, peace, and clean water. The six areas of focus, culled directly from our Foundation's mission statement, provide a framework for Rotarians to direct their efforts, energies, and expertise so that significant progress can be achieved in addressing these global needs. We anticipate that Rotary clubs and districts will continue to employ many of the popular activities, such as scholarships and exchange teams, to accomplish the goals of the areas of focus. However, the future grant-making model will also permit greater innovation in the development of integrated activities that incorporate multiple components and are long-term and sustainable. For example, instead of simply building a well, as your Matching Grant paid for in the past, a project under the future grant-making model could finance the building of wells, irrigation of farmland with water from the new wells, seeds for planting, farm animals for plowing the fields, microcredit to finance marketing the crops, and the like.

How will you finance these new global grants that I have just described? It will depend on how and who designs the grant. The overall global grant model encompasses grants designed by Rotary clubs and districts as well as predesigned packaged grants.

Club- and district-developed global grants will build on Rotarians' proven success in meeting world needs through the development of projects and sponsorship of scholars. In short, in many respects, these grants will resemble Matching Grants and Ambassadorial Scholarships of the past. Clubs and districts will contribute cash or District Designated Fund allocations; World Fund money will also be available.

As for the prepackaged grants, the Foundation will develop these grants by establishing strategic partnerships with organizations and corporations that have demonstrable expertise, considerable financial resources, and/or valuable advocacy in one or more of the six areas of focus. Financing from the World Fund and or the strategic partner will already be in place. The grant activity will already be designated. The clubs and districts will simply apply to implement the grant. The establishment of strategic partners for Rotary will greatly enhance service opportunities available to clubs and districts.

Rotary Foundation District Grants are not necessarily tied to the six areas of focus, but they must support the overall mission of the Foundation. These district grants will take the form of annual "block" grants representing up to 50 percent of a district's available District Designated Fund in a given program year. The guidelines for spending these funds are more flexible. Direct management of grant funds will permit districts to continue supporting their favorite activities and to continue collaborating with longstanding partners, even if one district is a pilot district and the other is not. The money may be spent on meeting immediate needs in either their home communities or abroad. For example, money in the district grant could finance a small community project, such as purchasing art supplies for a local school, or a high school graduate's enrollment in a local vocational program, or vocational training for a team of law enforcement officials. If your district has ever received a District Simplified Grant under the traditional grant-making model, you will have no difficulty understanding how the district grant can be used to support your Rotary activities.

Along with the simplification of the program menu, the qualification and grant application process has been streamlined and will be completed entirely online. In order to apply for grants, pilot district participants must first be qualified by The Rotary Foundation. Qualification will prepare districts for increased grant management responsibility; improve oversight of grant funds; allow for simplified application, payment, and reporting procedures; and provide additional resources to clubs and districts for successful implementation of grant activities. In short, qualification will ensure that the participating district understands international stewardship standards. Pilot districts will be able to access the necessary qualification forms online through Member Access after this assembly. Applications for both global grants and district grants will also be accessible to pilot districts starting in April. Although nonpilot districts will not *undergo* the qualification process until 2012-13, all clubs and districts may wish to begin familiarizing themselves with the provisions for qualification. These materials are a good source of guidance for international stewardship standards for all Rotary clubs and districts.

So how will we know whether the Future Vision Plan has been a success? We will rely heavily on the opinion of you and your fellow Rotarians, as well as project beneficiaries around the world. The clubs and districts who are participating in the pilot will offer feedback, of course, that will permit the Foundation to fine-tune its administrative processes before we introduce the new grant structure to the rest of the Rotary world in 2013-14. In addition, the Foundation has contracted with a consulting firm to develop the metrics that will enable us to measure the plan's ultimate success.

So, it is time to begin. Implementing the Future Vision Plan will be our challenge — and sometimes a difficult one, forcing us to use all the tools at our disposal and bringing our emotion as well as our intellect to bear. The paradoxical result is that the higher the goal, the higher our chance for success.