

"The vision exists. We know what needs to be done. But we are not doing it enough."

--Statement in the Plenary of the Third High Level Forum on Aid Effectiveness on September 4th by Louis Michel, Commissioner for Development and Humanitarian Aid, European Commission.

Working Paper: The Rotary Foundation Future Vision Plan: A Foundation for the 21st Century

Executive Summary. This working paper has two aims. First, it attempts to bring together in one document all of the published material on the FVP and present an overview of important changes in the TRF grant structure and how they will affect Districts and Clubs. Section 1 of RVP Resources Guide is an annotated guide to TRF publications and training materials related to the FVP on the Rotary International website. Second, it is a very brief lay of the development assistance landscape, and a discussion of how the FVP will position Rotary to play an even more significant role in global aid efforts.

The FVP is very much a part of a relatively recent phenomenon. In 2006, the IMF and the World Bank disbursed about \$24 billion in loans and credits. In the same year, American foundations, charities, and other philanthropies gave almost \$34 billion in international assistance. Whether they are called Global Funds, Global Development Alliances, Global Framework Agreements, "vertical funds," or the New Philanthropy, the best hope for the world's "bottom billion" lies in the ability of private aid givers to transform the current system of foreign aid and develop partnerships with the public sector to advance progress in achieving the UN Millennium Development Goals. Polio Plus and the Global Polio Eradication Initiative (GPEI), spearheaded by Rotary, WHO, the Centers for Disease Control (CDC), now joined by the Bill and Melinda Gates Foundation, are examples of Rotary's role in this new approach to aid. Rotary's H2O collaboration with USAID is another example. Section 2 of RVP Resources Guide is an annotated bibliography of recent books, papers, roundtables, and reports on aid architecture and reforming the US aid program. This bibliography is by no means exhaustive. I have limited it to publications that are available on line, and that address Health, Hunger, and Water or issues that directly affect the FVP. However, many of the publications include exhaustive bibliographies that will be useful to Rotarians wanting to know more.

"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

Part 1. The Future Vision Plan

The official bible of the FVP is the Report of the Future Vision Committee, which is available to Rotarians on the RI website as a series of Appendices (F through K) attached to the Minutes of the April 2008 and October 2008 TRF Trustees Meetings. The October version makes substantial changes in the April version, including pushing the start date for the Pilot out to 2010-11. Unfortunately, The Report is labeled as a planning document not to be used for presentations or training. I have included links to these resources in the bibliography.

The FVP Report is a detailed strategic plan to transform the structure of Annual Program Fund and World Fund programs by Rotary year 2013-14, with a three-year pilot involving 100 Districts to begin in the 2010-2011 Rotary Year, and closing out current programs in 2013-2014. The presentation includes the transition time line for each program area, a detailed overview of the implementation strategy, including responsibilities at each stage of the time line, the training plan, revisions to the Code of Policies, a new DRFC structure, and a new business plan, including a new Secretariat structure at TRF. Also included in Section 1 of the FVP Resources Guide are PowerPoint, video, and PDF presentations for Districts and Clubs, FAQ, and other presentation and training materials.

The Executive Summary in TRF Business Model [Appendix K] states that the FVP 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 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

One of the central themes of recent literature is that the surge in donor support, especially in the Health and Hunger sector, has been accompanied by a proliferation of aid channels, fragmentation, and earmarking that have contributed to the complexity of global aid architecture, and often lead to failure to deliver aid to those who need it. For example, the average number of donors per country rose from about 3 in 1960 to 30 in 2006. In addition, there are currently over 230 international organizations, funds, and programs. More than 100 major organizations are involved in the health sector. Bob Scott is speaking to this in the quote above from the Executive Summary of the new business plan. In an interview in May, 2008, he states:

There were, for instance, 10,000 Matching Grants from '65 to the year 1998. And from the next five years there was another 10,000. And since 2002 the number has continued to increase. The other side of the picture is, I think, that we wanted to maybe change from projects to programs. In other words, do far fewer minor – what I call “band-aid” projects – and go to larger programs such as our 3-H, but expanded in order to make a real difference to communities.

In the period from June 2007 to June 2008, 3,345 matching grants were approved, for a total of \$49,714,097. The average TRF contribution was \$14,862, and the average project \$34,678. 517 grants were approved in the October, 2008 report for \$5,794,427 (average TRF contribution of \$11,208), and 561 grants in January, 2009 for \$7,020,941 (\$12,515). The current minimum TRF contribution is \$5,000, with the minimum project amount at \$11,665. I have not done an exhaustive search of Rotarian Action Group website, but a quick survey suggests that the average project is around \$15,000. Of the 33 projects listed on ProjectLINK, the average project size was \$27,797, with a TRF contribution of around \$8,000. 4 were too small to be eligible, and 2 would be Competitive Grants. The majority of grants were barely over the minimum project size. These are the so-called “band-aid” projects.

There are significant transaction costs associated with this proliferation of small grants, not only from TRF's perspective but also from that of project beneficiaries. Fragmentation is at least in part an outcome of the proliferation of new foundations, NGOs, and global partnerships. One characteristic of these new organizations is a high level of “ego equity,” which implies that there is a strong resistance to pooling resources or coordinating efforts, and an equally strong tendency to demand attention from local leaders or officials. One local water department official in Ethiopia told researchers that he spends his entire working day meeting with over 22 NGOs that have ongoing projects in his district, and dealing with problems arising from another 25 projects being carried out by organizations that have bypassed him (and any other official supervision) completely. Proliferation of aid channels is particularly pronounced in the health sector, where more than 100 major organizations are involved. One challenge for FVP Pilot Districts will be the resistance of club presidents and international chairs to pooling resources, especially if the current policy of having only one Principal International Partner is maintained.

The Water and Sanitation Rotarian Action Group Strategic Plan 2008 quotes Water For People statistics showing that as many as 50% of water and sanitation projects completed by all service and faith-based organizations (including Rotary projects) have not demonstrated sustainability within 5 years of their completion, indicating that many of these project are not designed or implemented to be sustainable.

On the other hand, WASRAG, also acknowledges that, Rotary has an advantage over organizations because of the sheer number of Rotarians and Rotary Clubs around the world. This allows Rotary to have “eyes and ears” in the countries of need through its worldwide network of clubs and districts (WASRAG Strategic Plan).” How to combine this ability to take a bottom-up “country” approach based on the local “eyes and ears” of sponsoring Host Clubs with the “scaling up” required to achieve

significant and sustainable outcomes is one of the central themes of the FVP. FVP Committee projections suggest that the net return from implementation of the FVP will be \$6 million by 2020.

“Along with financial benefits, the most important outcome of the Future Vision Plan is beneficiaries receiving significant and sustainable outcomes, and enabling the secretariat to effectively service Rotarians during the next century of service (Rotary Foundation Business Model, Summary Financial Forecast).”

In concrete terms, the following changes are designed to achieve FVP objectives:

- ④ Simplify Foundation programs and processes consistent with the mission
 1. Eliminate programs, reassign them to district level, or reassign them to Global club and district developed or RI packaged grants. GSE closed out in 2010-11 for Pilot Districts, Vocational Training Teams now funded by District Grants or Global club and district developed Global Grants, Ambassadorial Scholarships renamed Scholarships (Multi-year Ambassadorial Scholarships phased out, but scholarships terms are 1-4 years), 3-H Grants closed out in 2010-11 (to be replaced by Level-3 Global Grants and RI packaged grants).
 2. Increase minimum TRF contribution to Global Grants to \$15,000, Level-1 maximum to \$50,000, Level-2 maximum to \$100,000, and Level-3 to \$200,000.
 3. Introduce packaged Global Grants (RI/USAID H2O Collaboration pilot model).
 4. Introduce Strategic Partnerships
- ④ Focus Rotarian service efforts where they will have the greatest impact by addressing priority world needs relevant to Rotarians
 1. Introduce Areas of Focus and require that Vocational Training Teams, scholarships, club-district developed Global Grants, and packaged Global grants are relevant to them.
 2. Introduce Strategic Partnerships
 3. Introduce packaged Global Grants (RI/USAID H2O Collaboration pilot model)
- ④ Offer program options to help achieve both global and local goals
 1. Districts and clubs may continue to sponsor discontinued programs (e.g. traditional GSE, new Vocational Training Teams by Pilot Districts not related to Areas of Focus, grants to university teachers) by using District Grants.
 2. Eligibility criteria revised to allow greater flexibility. Renovations to existing buildings will now be allowed, including plumbing and electric and additions to buildings.
 3. Up to 50% of DDF funding can be used for District Grants.
- ④ Increase the sense of ownership at the district and club levels by transferring more decisions to the districts
 1. Districts and clubs may continue to sponsor discontinued programs by using District Grants.
 2. Eligibility criteria revised to allow great flexibility.
 3. However, 20% of DDF funding maximum maintained.
- ④ Gain greater understanding of The Rotary Foundation’s work and enhance Rotary’s public image
 1. Greater emphasis on PolioPlus (Gates \$200 Million Challenge)
 2. Areas of Focus, Rotarian Action Groups
 3. Strategic Partnerships (Rotary/USAID H₂O Collaboration, a Global Development Alliance with USAID).
 4. TRF Packaged Global Grants

Numbers Matter

One of the most significant changes in the FBP Global Grants structure will be the changes in minimum and maximum grant requests, and the level of assessment required at each level of funding. These changes will immediately change the way Pilot districts and clubs approach major matching grants, necessitating much more collaboration among clubs, scaling up of projects, and greater focus on bottom-up needs assessment by Host Clubs in the project countries. WASRAG has been one of the The chart below shows the new structure of Global Grants, and the level of oversight associated with each level.

Levels of Grant Application Assessment

a) Level 1*

- Award amount: US\$15,000-US\$50,000
- Assessment requirements: Application review by general secretary; area of focus expert analysis, if needed.

b) Level 2*

- Award amount: US\$50,001-US\$100,000
- Assessment requirements: Application review by general secretary; area of focus expert analysis, if needed; technical review and interim site visit by The Rotary Foundation Cadre of Technical Advisers.

c) Level 3*

- Award amount: US\$100,001-US\$200,000
- Assessment requirements: Application review by general secretary, area of focus expert analysis, technical review, advance site visit and interim site visit by The Rotary Foundation Cadre of Technical Advisers.

*An area of focus expert, in consultation with the Cadre chair, may determine that the appropriate level of assessment is not commensurate with the award amount and either waive or add additional requirements to the level of assessment. [Appendix J, The Rotary Foundation *Code of Policies* Future Vision Plan Amendments, p. 65]

The chart below illustrates how this new grants structure will affect minimum and maximum funding levels:

Current	Club	District	TRF	Total Project
	3,333	3,333	5,000	11,666
	16,666	16,666	25,000	58,332
	Club	District	TRF	Total Project
Level 1	10,000	10,000	15,000	35,000
	33,333	33,333	50,000	116,666
	Club	District	TRF	Total Project
Level 2	33,434	33,334	50,001	116,769
	66,666	66,666	100,000	233,332
	Club	District	TRF	Total Project
Level 3	66,667	66,667	100,001	233,335
	133,333	133,333	200,000	466,666

Looking at District 5000 preliminary Matching Grant allocations for 2009-2010, only the RC of Honolulu (with \$10,006) could do a Global Grant on its own. Assuming that DDF funding for matching grants remains in the area of \$125,000 in the first year of the Pilot (2010-11), District 5000 will be able to do 12 or 13 grants, and assuming that all of our clubs participate in Phase 1, each matching grant will have an average of 4 partners.

The assumption that DDF earmarked for matching grants can remain at the current level is, in any case, doubtful. Pilot districts will be expected to participate in TRF packaged grants with Strategic Partners, and are also expected to take up current programs that are being phased out at the TRF level. For example, the Rotary/USAID \$6 million H₂O collaboration will receive \$1.5 million in 3-H funding from TRF. Districts and clubs, and especially FVP Pilot districts, will be expected to contribute the remaining

\$4.5 million in DDF and club contributions. Beyond the FVP, budget cuts for the 2009-10 Rotary Year have already resulted in the elimination of all 3-H grants except the \$1.5 million in earmarked funding for the Rotary/USAID \$6 million H₂O collaboration. Taken together, these changes will enable Pilot districts and clubs to achieve a much higher level of coordination in Global Grants and packaged Global Grants.

Areas of Focus

Quite a number of our Rotarians have always argued that we're not doing everything we ought to be doing, in the sense that sometimes it gets bureaucratic. Why didn't we simplify our efforts? Why didn't we align our programs? There is a need to modernize, and that's perhaps one of the reasons why we want to streamline our activities so that we're not just like any other foundation that specializes in a particular cause or disease eradication.

Jonathan Majiyagbe, Foundation Chair for 2008-2009 in The Rotary Foundation Future Vision Plan, A Conversation on Change, May 2008

The FVP Areas of Focus could be described as a framework for Rotarians to “talk the walk” of international development assistance. Rotary clubs and districts have done thousands of projects in every country of the developing world, but, historically, Rotary has been known only for PolioPlus. Many matching grant projects are launched only because a new president or international chair “needs” a water project, or a child mortality project, to meet Presidential Citation or District Governor Citation criteria. Outside of the Rotarian Action Groups, there is very little focus on what developing countries need or want, and the selection of countries for projects is often based on little more than the fact that a District Governor was approached by classmates at the GETS, or presidents approached by classmates at PETS or District Assembly. On the other hand, the best of the RAGs, such as WASRAG, already speak the language of the global aid architecture. Look at WASRAG's strategic plan, or recent PowerPoint presentations, and you will find all of the vocabulary supporting the FVP: sustainability, coordination, alignment, strategic partnerships, MDGs, scaling up, in-country capacity, etc.

In order for Rotary and TRF to enter the ranks of premiere global assistance foundations, it is essential that TRF and Rotarians worldwide identify its priorities in terms that align with those of the global assistance community. Rotarians need to learn to “talk the walk” of global philanthropy, not only to enable the leadership of TRF or RAGs to carry on dialogs with other influential organizations, but also from the perspectives of membership development and retention and fundraising. When asked what Rotary does, we need to be prepared to say “PolioPlus,” and a Global Development Alliance with USAID on water, sanitation, and hygiene in South America, Africa, and the Philippines, child mortality, maternal health, blindness prevention and much more.

The matrix below compares the FVP TRF Areas of Focus to United Nations Millennium Development Goals and to the Rotarian Action Groups already working in specific areas. The eight Millennium Development Goals have been adopted by the international community as a framework for the development activities of over 190 countries in ten regions; they have been articulated into over 20 Targets and 60 indicators. The Targets and indicators allow the UN, the World Bank, the U.S. Millennium Challenge Corporation, NGOs, and Global Funds to track progress toward the MDGs up to 2015.

Rotary Area of Focus	UN MDG	Rotarian Action Group
1. Peace and Goodwill		
Peace and Conflict Prevention	All 8 MDGs Goal 8: Develop a Global Partnership for Development	All RAGs
2. Health		
Disease Prevention and Treatment	Goal 4: Reduce Child Mortality Goal 5: Improve Maternal Health Goal 6: Combat HIV/AIDS, Malaria, etc Goal 7: Ensure Environmental Sustainability	Health Fairs Dental Volunteers Rotarians for Fighting AIDS Rotarians Eliminating Malaria Diabetes Water and Sanitation Blood Donation Blindness Prevention Polio Survivors and Associates MS Awareness Hearing Regeneration Hunger and Malnutrition
Water and Sanitation	Goal 4: Reduce Child Mortality Goal 5: Improve Maternal Health Goal 7: Ensure Environmental Sustainability Target: Halve, by 2015, the proportion of the population without sustainable access to safe drinking water and basic sanitation	Water and Sanitation Population Growth and Sustainable Development
Maternal and Child Health	Goal 4: Reduce Child Mortality Goal 5: Improve Maternal Health Goal 6: Combat HIV/AIDS, Malaria, etc Goal 2: Achieve Universal Primary Education Goal 3: Promote Gender Equality Goal 7: Ensure Environmental Sustainability	Population Growth and Sustainable Development Blindness Prevention Polio Survivors and Associates MS Awareness Hunger and Malnutrition
3. Education		
Basic Education and Literacy	Goal 1: Eliminate Extreme Poverty and Hunger Goal 2: Achieve Universal Primary Education Goal 3: Promote Gender Equality Goal 7: Ensure Environmental Sustainability	Population Growth and Sustainable Development Hunger and Malnutrition
4. Poverty		
Economic and Community Development	Goal 1: Eliminate Extreme Poverty and Hunger Goal 2: Achieve Universal Primary Education Goal 3: Promote Gender Equality Goal 4: Reduce Child Mortality Goal 5: Improve Maternal Health Goal 6: Combat HIV/AIDS, Malaria, etc Goal 7: Ensure Environmental Sustainability Goal 8: Develop a Global Partnership for Development	Microcredit Population Growth and Sustainable Development Hunger and Malnutrition Water and Sanitation

FVP planners intend for the Areas of Focus to be taken seriously, and they are pervasive in FVP planning. All programs that are not relevant to the Areas of Focus have been eliminated or reassigned to District administration, with funding through District Grants. Rotary Scholars (previously Ambassadorial Scholars) will be selected from candidates who intend to pursue an Area of Focus in a 1-4 year post-graduate program. GSE has been renamed Rotary Vocational Training Teams, and teams must now have specific projects related to the areas of focus. Team members are expected to have a vocational background related to the areas of focus, and funding is through club-district Global Grants, which means that they will require DDF support. The FVP Sample Program/Grant Comparison, District Grants are described as follows:

Rotary Foundation District Grants fund projects and activities that do not relate to the areas of focus or meet the minimum grant amounts for Rotary Foundation Global Grants. Funds can be used to support projects and activities previously funded by Cultural Ambassadorial Scholarships and smaller Matching Grants or scholarships and vocational training teams not related to the areas of focus.

Club-district developed Global Grants are also required to be related to an Area of Focus, and The Secretariat will also undergo a radical business model restructuring, with reassignments and other staff changes to streamline the bureaucracy, reduce costs, and insure that area of focus experts are available for grant assessments at all levels.

Looking at the Areas of Focus, it is difficult to imagine a Rotary project that would not fit into one of them. What is important about the Areas of Focus is that they focus Rotarian interest on priority areas of assistance that are shared by the global community. In some cases—water, disease prevention—Rotary has specific technical advantages arising from long experience. It could be argued that the Rotarian Action Groups already provided resources to clubs and districts, but the RAGs themselves need the Areas of Focus to coordinate activities and develop strategic plans that relate their specific themes to global issues acknowledged by other organizations. The Strategic Plan of WASRAG should be a model, embodying the objectives of the FVP:

- ④ Develop formal strategic partnerships that allow the collaboration and coordination needed to jointly plan and implement major regional projects
- ④ Build on successful models based on Rotary projects and those of other NGOs
- ④ Build the delivery capacity in the countries of need
- ④ Prioritize programs to match resources and needs
- ④ Create local (in-country) capacity and monitor for success

The last of these objectives relates to a frequent criticism of the new Global Funds (Global Development Alliances such as the Rotary/USAID collaboration, new philanthropy, etc), which is that they are vertical funds that earmark, or “stovepipe” funds into specific aid interventions that may not align with the priorities of the countries where projects take place. Vertical funds are defined as “partnerships and related initiatives whose benefits are intended to cut across more than one region of the world and in which the partners (a) reach explicit agreement on objectives [polio eradication], agree to establish a new formal or informal organization [GPEI], (c) generate new products or services [e.g. intravenous polio vaccine], and (d) contribute dedicated resources to the program [the Gates Challenge]. In other words, global programs focus “vertically” on specific issues, in contrast with the “horizontal” approach of the country-based model advocated by the World Bank and the High-Level Forums on Aid Effectiveness in Accra. PolioPlus is a vertical fund, as is the GPEI. All of the RAGs have a vertical orientation. Again, however, the huge advantage that Rotary has over other organizations, including the Gates Foundation, is the existence of thousands of Rotary clubs in the countries we hope to serve, often with members who are influential local officials, business people, or involved in NGOs specifically related to areas of “vertical” interest. We also have a huge track record of thousands of grants, which offers the opportunity to “scale up” our success stories into elements of strategic plans.

The Rotary Club of Delhi South Metropolitan (District 3010) has a 3-H Grant in involving tribal mountain women in the poor Himalayan region of Uttaranchal. The project has three areas of focus, and each has a club member as project coordinator:

- ④ Raise earning capacity through intensive agri-horticulture for long-term growth (project head, M.L.Dewan, a Charter member of our club and a Paul Harris Fellow. He is the founding Chairman of HIMCON [Himalayan Consortium for Himalayan Conservation])
- ④ Empower Self-Help Groups (SHGs) to deal with local officials, set up micro-credit operations, and eventually take over management of the 3-H Grant (project head, T.K. Mathew is the Chief Executive of Deepalaya [an NGO working with slum dwellers in Delhi to form SHGs along the same lines]. He is the Club President)
- ④ Improve Health through preventive medicine, including water capture sites sand filters, soak pits for sanitation; and, address malnutrition, vector and water-borne disease, and TB through awareness campaigns (project head, Dr. Rajiv Tandon, a Charter member and a PP. He is a Senior Advisor to U.S. Agency for International Development [USAID])

In every case, the project head is not only a leader of the club, but also an expert in the project area of focus. More important, he or she is well-grounded in local needs and priorities, and able to build on the strengths of the tribal women in the local villages.

The Rotary/USAID H₂O Collaboration, Strategic Partnerships, and TRF Packaged Grants

“We intend these projects to be models for future projects with strategic partners and in this way to enhance our contribution to world understanding, goodwill, and peace.”

— Past RI President William B. Boyd, chair of the International H₂O Collaboration Steering Committee

This Global Development Alliance (or global framework agreement) with USAID is intended to be a pilot project for future TRF packaged grants with Strategic Partners is a \$6 million project to fund a number of 3-H projects in the Dominican Republic, Ghana, and the Philippines. TRF will fund \$1.5 million, which will be matched by USAID. Clubs and districts will be asked to contribute the remaining funds *ala* the Gates Challenge.

It is not surprising that the WASRAG leadership is well represented on the steering committee of this project. USAID presented at the WASRAG Water Summit in Los Angeles last year, along with other government agencies and NGOs. The RI/USAID International H₂O Collaboration Fact Sheet certainly “talks the walk” of sustainable WASH projects, with a recent emphasis on hygiene and hygiene behavior change.

To realize GDA goals, USAID and Rotary International will work together to support the three pillars required for sustainable access and use of improved water supplies and sanitation. These are:

- Access to appropriate hardware — municipal and community water supply and sanitation systems, household sanitation facilities and other household-level technologies and products
- Behavior change and hygiene promotion — community mobilization for sustained management of water supply and sanitation infrastructure; social marketing campaigns to increase demand for water, sanitation, and hygiene; hygiene promotion programs
- Enabling environment — community organization, improving policies, institutional support, sustainable financing, and cost recovery for improving the sustainability of projects

10 months ago, I would have been opposed to a Rotary alliance with USAID. For years it has been suffering from an identity crisis, and has had most of its functions taken over by the Department of Defense. Staff and technical expertise had plummeted. In 1990, USAID had a staff of 3,500 administering \$5 billion a year. By 2008, the agency had only 2,200 dedicated staff administering more than \$8 billion annually. This has resulted in over-reliance on contracting and large contracts with less oversight. In her Foreign Affairs Day speech on May 1, Secretary of State Clinton described USAID as follows:

From my very first days here at State, I have included USAID and all of the development agenda that lies ahead. We want to streamline it. We want to make it more efficient. We want to move more of AID's work back inside AID instead of having it out with contractors, because we are wasting an enormous amount of money. Fifty cents on the dollar doesn't even get into the pipeline to actually be delivered. We only have four engineers in all of USAID now. And I think it's important that we get back to the United States Government providing these services.

Given TRF's reputation as a first-choice partner for global alliances (WHO, CDC, UNESCO, the Gates Foundation), it would have made little sense to partner with an agency that had little control of its projects. However, Clinton has clearly staked out a new direction for USAID. The Development Leadership Initiative aims to infuse the agency with new personnel and to double the number of Foreign

Service officers in USAID by 2013. More important, Clinton plans to expand upon the previously limited ability to engage directly in public-private partnerships through the Global Development Alliance Initiative program Rotary/USAID Collaboration). The following quote from Alonzo Fulgham appears at the end of the H₂O Brochure:

“Through this important collaboration, the service ethic and commitment of hundreds of thousands of Rotarians around the world will be joined with the global development expertise and technical leadership of USAID to yield a significant, sustainable increase in water supply and sanitation coverage for the planet’s poorest and most vulnerable populations.”

— USAID Acting Administrator Alonzo Fulgham

Once the FVP Pilot begins, we will see more initiatives with Strategic Partners, and the emphasis for Pilot clubs and districts will shift from 3-H Grants to TRF-packaged Global Grants. While there are very few details in the planning documents of what these plans will look like, Bill Boyd, for example, has pointed to the Rotary/USAID GDA as a model. The emphasis will be on TRF-initiated programs (with input from power RAGs) with Rotarians and clubs contributing cash and districts contributing cash and DDF allocations. These TRF corporate projects will compete with all other allocation options, including club-district initiated Global Grants at all levels.

Based on two recent publications from the GPEI, Global Polio Eradication Initiative Strategic Plan 2009-2013 and Global Post Eradication IPV Supply and Demand Assessment, commissioned by the Gates Foundation, even a formal declaration of polio eradication is not hoped for before 2013. Even if this is achieved, it will be impossible for Rotary to walk away from polio, especially given the strategic partnership with the Gates Foundation. Vaccine Derived Polio Virus will continue to be a problem until the cessation of OPV treatment in 2013, and the cessation of OPV will itself entail a high risk of new outbreaks. Recent outbreaks in 10 African countries and in Uttar Pradesh, previously certified as polio free, are stark reminders of the fragility of eradication, even with continued surveillance.

Nevertheless, in the meantime, the question of “What Next?” is still a high priority for TRF and for Rotarians worldwide. Water, Sanitation, and Hygiene is a strong candidate, promoted by a strong and sophisticated RAG. Maternal Health is the current favorite of global health organizations and health officials. HIV/AIDS was the principal driver of the huge increase in ODA and private contributions to international assistance, and the Rotarian Fighting Aids RAG would certainly argue for it, but I do not believe it is a probable candidate as Rotary’s next corporate project. The President’s Emergency Plan For AIDS Relief (PEPFAR), the Global Fund to Fight Aids, TB, and Malaria (GFATM), and other global alliances are all attractive strategic partners for specific projects, but HIV/AIDS as a corporate project carries too many risks. There are 5 new cases of HIV for every current victim that is brought under treatment. Moreover, HIV is adapting to current treatment regimes, and new strains are emerging that are resistant to current standard treatments delivered to poor countries, and require new drug regimes that are increasingly expensive. Rich countries and multi-laterals that have committed to HIV/AIDS treatment face a permanent entitlement to poor countries AIDS victims that will only become more expensive until a cure is found. Ultimately, under the FVP, TRF will probably pursue a number of TRF-packaged programs in collaboration with major organizations waiting to partner with Rotary.

I sincerely hope that District 5000 is able to participate in the FVP, and look forward to working on larger and more sophisticated Global Grants.

Working Paper: The Rotary Foundation Future Vision Plan: A Foundation for the 21st Century

Annotated Guide for the FVP Resources Available on the Rotary Website and Resources for the Context of Global Aid Available on the Internet

Section 1: Overview of the New Vision Plan (annotated resources)

Report of the Future Vision Committee Trustees Minutes October 2008, The Rotary Foundation. [*Note: This is the official planning document for the Future Visions Plan. Unfortunately, it is not to be used for presentations.*] These Appendices are included in this report. All are available in PDF format at the following link]

http://www.rotary.org/RIdocuments/en_pdf/trustee_minutes0810_en.pdf

Appendix F, TRF Future Vision, Transition Plan for New Grant Model [Graphic presentation of timeline for transition to New Programs and New Grant Structures].

Appendix G, Strategic Overview of Implementation Plan 2008-2013, Revised October 2008. [Detailed outline of timeline and responsibilities for implementation 2008-2013].

Appendix H, Future Visions Training Plan 2008-2013. [Detailed presentation of new publications, Zone and District trainers, Communication from TRF to Zone, to District, to PETS.

Appendix I, District Leadership Structure. [Graphic Representation and discussion of proposed Future Vision District Rotary Foundation Committee structure]

Appendix J, THE ROTARY FOUNDATION CODE OF POLICIES. [Draft of proposed reinvasion to TRF Code of Policies. This is an extraordinary document. It outlines the proposed new Areas of Focus, remodeling of some existing programs (GSE, for example), the new grant structure, significant changes in eligibility standards (especially in regard to renovation and expansion of existing structures), minimum and maximum TRF grants for each type of grant (\$15,000 and \$200,000 for Global Grants), and levels of grant assessment].

Appendix K, TRF Business Model. [Detailed description of new TRF Secretariat, staffing structure, technology, grant assessment process, financial impact of Pilot and full implementation, etc.]

Report of the Future Vision Committee, Trustees Minutes April 2008, The Rotary Foundation. [*Note: This is the original presentation to the Trustees*]

http://www.rotary.org/RIdocuments/en_pdf/trustee_minutes0804_en.pdf

Appendix C, Future Vision Plan Areas of Focus [not in the October report]

Appendix D, Distributable Funds Model: Proposed Structure for Funding of New Grant Making Model. [Not in the October Report].

Appendix E, Transition Plan for New Grant Model [corresponds to Appendix F in the October report. In the latter, the start date for the Pilot has been pushed forward one year. Decisions made at the April 2009 meeting, Minutes of which have not yet been posted, have brought forward elimination or revision of some programs (Rotary Grants for University Teachers, Multi-Year Ambassadorial Scholarships, Cultural Ambassadorial Scholarships, GSE funded by World Fund to exchange over two years, etc).

Appendix F, Revisions to Approved 2008-08 Future Vision Implementation Plan [further revised in Appendix G of October report].

Appendix H, Existing TRF Programs and Activities Transition to New Grant Structure. [Not in October Report]. This is one of the most interesting presentations of the New Vision Plan Report. It is footnoted: "All examples are for informational purposes only. Complete criteria have not yet been identified so the examples provided can be used as a guide for possible ways in which activities can be undertaken under the new grant structure."

More criteria are identified in Appendix J of the October report, but this presentation is in chart form, and gives concrete examples of eligible and non-eligible proposals under the new structure. Appendix H is still using provisional titles for new programs. Type A grants are District Grants. Type B grants are Global Grants (Club/District and Packaged Global Grants). GSE will change to Vocational Training Teams (funding structure will change), Ambassadorial Scholarships will change to Rotary Scholarships.]

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Rotarian Action Groups

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