



HOSTING SITE VISITORS

Expectations of Project Sponsors

Global grants and district grants may require site visits from The Rotary Foundation Cadre of Technical Advisers (the Cadre) for evaluation purposes. Cadre members are Rotarians who have professional experience in the project area and may be assigned to visit the project before (advance site visit), during (interim monitor) or after (post-project monitor) implementation.

To ensure an objective and well-planned visit, host project sponsors should follow these guidelines.

COMMUNICATION

- Communicate with the cadre member after receiving his or her contact information from TRF staff. This will help create a good working relationship and is necessary to begin planning the trip logistics.
- In the case of an advance site visit, the cadre member has only a short period of time to book travel, visit the project site and submit their evaluation in order for the project to be considered by the Trustees of The Rotary Foundation. All communication must be timely.
- Inform the cadre member if translation services are needed for the site visit, and assist with these arrangements.

TRAVEL

- Inform the cadre member of the exact destination (not just where he or she will stay but the location of the project) and the travel method(s) entailed. Cadre members are required to use the Rotary International Travel Service (RITS) and must give all of this information to RITS. Lack of information slows down the process and may cause delays or confusion.
- The time frame of the visit may not be convenient for the club or district. Unfortunately, due to the grant business cycles, cadre members must travel within a short period of time. Please note that it is not the site visitor requesting a particular time frame, but rather a need to adhere to Trustee requirements. Failure to assist and host a visit may jeopardize the sponsor's chance for grant approval, payment or closure.

- Set travel dates with the cadre member and offer advice on travel logistics and lodging arrangements. All cadre costs are covered by TRF. Cadre members can be reimbursed for reasonable costs, but TRF cannot reimburse other Rotarians.

LOCAL ARRANGEMENTS

- Set up meetings between the cadre member and all Rotarians directly involved with the project. Do this before the visit to ensure all necessary people are available. Do the same with any cooperating organization representatives and officials at project sites.
- Include district leadership and other club members in these meetings so the cadre member can learn more about the club and district and its participation and involvement.
- Produce all necessary grant-related paperwork before the visitor arrives. This includes project plans, bank and financial information, deeds, etc. The cadre member is only on site for three days, so there is not time to wait for materials.
- Arrange the cadre member's itinerary for the actual project site visit. Send this in advance of travel.
- Arrange meetings between the cadre member and project beneficiaries. Please allow adequate time for all meetings.

PROCEDURES

- All cadre evaluations are confidential and cannot be shared with the project sponsors or other Rotarians. Only TRF staff and Trustees have access to these evaluations. Confidentiality helps to ensure objectivity.
- The site visit evaluation is only one of many factors considered by the Trustees when making a decision regarding grant approval.
- Cadre members are experts in their field and can serve as excellent resources to project sponsors, who can ask a site visitor for ideas on how to strengthen or improve the project.

For additional information, please contact:

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