

ENGLISH (EN)

# CADRE Site visit Feedback Meetings

**Steps to Conducting a Cadre Site Visit Feedback Meeting**

***What is a Cadre site visit feedback meeting?***

A feedback meeting is an opportunity for the Cadre adviser to summarize their findings of the project’s major strengths, challenges and areas for improvement at the end of a site visit. The findings should not be surprises to the stakeholders, but rather summaries of discussions the Cadre member has had with the sponsor Rotarians and other stakeholders throughout the visit. Cadre evaluators should also use the forum as an opportunity to act as facilitators to assist Rotarian sponsors and stakeholders to plan next steps forward.

***When should an feedback meeting be conducted?***

A feedback meeting should be the final step of the site visit. Thus, it should take place at the end of your visit, before departure.

***Who should take part in the feedback meeting?***

Participants will depend on the project, but generally should include the sponsor Rotarians and any other major stakeholders involved with the project implementation.

***Why is it necessary to conduct a feedback meeting?***

A feedback meeting should aim to help the Cadre evaluator accomplish the following:

* summarize findings and discussions from the visit for all stakeholders
* encourage sponsor Rotarians to respond proactively to the Cadre evaluator’s insights by collectively outlining next steps to resolve any project issues and capitalize on project strengths
* promote transparency
* maximize Cadre support and assistance to sponsor Rotarians

***Isn’t a Cadre site visit supposed to be confidential?***

The Cadre evaluation form you complete on MyRotary is confidential and is not shared with the sponsor Rotarians. Rotary often shares summaries of information collected on the form with grant sponsors, but never shares the direct comments of the Cadre evaluators. This allows Cadre evaluators to be completely honest in their evaluation. However, please keep in mind that there are two purposes of a Cadre site visit evaluation:

* to assist TRF Trustees in evaluating use of grant funds, and
* to provide assistance and advice to Rotarians who are planning and implementing projects

The feedback meeting supports the latter objective by providing an exercise to summarize the discussions about project strengths and weaknesses that you have observed as a Cadre evaluator.

The entire site visit should be a guided learning process for Rotarian sponsors. Try to maximize the support and expertise you can offer by making the site visit an open, transparent and positive effort to work collectively towards making the project even more impactful.

Please note, though, that **you** ***should not address any issues during the feedback meeting that you do not feel comfortable discussing*** – particularly matters of stewardship. If stewardship issues arise, please notify TRF and staff will follow up directly.

**Steps to Conducting a Cadre Feedback meeting**

1. **Schedule the feedback meeting before arriving at site**: Before leaving for your Cadre site visit, work with the Rotarian project lead to schedule an feedback meeting. Be sure to communicate that all Rotarian sponsors and stakeholders involved should be invited.
2. **Print a copy before leaving home**: Print a copy of the form to bring with you. This way you can start to fill in the chart at any time before the feedback meeting.
3. **Fill out the first two columns before the feedback meeting**: Before the feedback meeting takes place, fill out the first two columns of the feedback meeting form:

**Strength/Challenge**: List 4 – 6 of the most outstanding project strengths and challenges that your site visit has identified. Try to include both strengths and challenges.

**Why is it a Strength/Challenge**? Outline the data or logic to support why the sponsor should plan to maintain the specific strength or make modifications to address the specific challenge. Understanding your reasoning could help Rotarians make more-informed project decisions in the future.

1. **Use your partially-completed form as an outline for the feedback meeting.**
   1. Present the strengths and challenges with explanations as to why they are strong elements of or obstacles to project success.
   2. Ask attendees to discuss the circumstances under which the strengths and challenges arose. What did they do to cause the particularly strong aspects of the project? What happened to produce the challenges you observed?
2. **Facilitate project solutions**: Facilitate discussion on what the sponsors can do to maintain and expand the strengths of the project and/or overcome the challenges. Try to facilitate sponsor discussion and problem-solving to better ensure sponsor ownership of the decision. As a Cadre member, your experience and expertise is welcome to clubs, but they must take ownership of the final decisions.
3. **Fill in the remaining two columns during the feedback meeting**: Try to end the feedback meeting with next steps and responsibilities for those steps assigned. As the facilitator, it is not your place to assign responsibilities, but rather to ask questions such as the following:
   1. How can you maintain this strength?
   2. How can you use that strength to make the project even better?
   3. What are your ideas on how to overcome this challenge?
   4. What are possible steps to maintaining the strength/overcoming the weakness?
   5. Who is going to be responsible for the first step?
   6. When do you expect to have accomplished that step?
   7. What happens next? Who will be responsible for that step?
4. **Share the results**: Using your notes from the meeting, type out the Site Visit Feedback Meeting Worksheet (if your handwriting is legible, you may make a copy), and share a copy with:
   1. The project sponsors (both host and international sponsors)
   2. TRF by attaching the worksheet to your Cadre evaluation in MyRotary