

## SITE VISITS: WHAT PROJECT SPONSORS SHOULD KNOW

Global grant and district grant projects may require site visits by [The Rotary Foundation Cadre of Technical Advisers](#) (the Cadre) for evaluation and auditing purposes. Cadre members are volunteer Rotary members who have professional expertise in one or more of Rotary's areas of focus or as auditors. The Cadre members can help Rotary clubs as they plan projects, and they may be assigned to visit projects prior to grant approval (advance site visit), during the project implementation phase (interim monitoring), or after project completion (post-project monitoring). On a site visit, Cadre members evaluate the quality of the project, assess its impact, and ensure that grant funds are being used properly. At the end of the visit, Cadre members are required to hold a [site visit feedback meeting](#) in order to share their findings and discuss the project's strengths, challenges, and areas for improvement with the project stakeholders.

To plan for a successful site visit, host sponsors should:

### 1. Communicate

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- After receiving notification of an upcoming site visit from Foundation staff, sponsors should contact the Cadre member to confirm the dates of the visit and to learn how meetings will be carried out. This step is necessary for the Cadre member to begin planning the trip; it also helps build a good working relationship.
- The members of the project's host grant committee should assist and communicate with the Cadre member throughout the visit. The international grant committee members are not required to be present at the project site, but they should participate virtually via videoconferencing, email, etc.

### 2. Prepare

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- Create an itinerary for the visit by scheduling meetings with the Cadre member and project stakeholders, including:
  - Grant committee members and Rotary members directly involved in project planning and implementation
  - Community members who will benefit from the project
  - Beneficiary organizations, such as schools or hospitals receiving equipment or training

- Implementing partners and cooperating organizations
- Other stakeholders, such as government authorities and community leaders
- District leaders

*Note:* If young people (under age 18) will be interviewed as part of the project stakeholder meetings, you will need to obtain permission from parents or guardians. Also make sure that all participants (or their parents or guardians) sign model release forms for any photos or videos.

- Prepare all grant-related documentation to share with the Cadre member. This includes the grant application; project plans such as training materials and schedules; bank statements; ledgers and invoices; deeds; leases; memorandums of understanding; and other supporting legal documents. The Cadre member's time at the project site is limited, so prepare and share all materials with the Cadre in advance.
- Help arrange accommodations and local transportation for the Cadre member. Cadre members are reimbursed by the Foundation for evaluation-related expenses; **sponsors are not responsible for the Cadre member's lodging, meals, or transportation costs.** Project sponsors are responsible for covering any costs associated with their own participation in the evaluation.
- Help arrange any needed translation services.
- If virtual meetings will take place, confirm technical details such as phone and internet connections.
- If possible, schedule the visit so that the Cadre member can attend the sponsor club's regular meeting.
- Schedule the site visit feedback meeting with grant committee members and other project stakeholders for the end of the visit to discuss with the Cadre member the evaluation findings and recommendations.

### 3. Follow up

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- The Cadre member will share with the project sponsors a summary of the evaluation findings and outline strengths, challenges, and recommended improvements.
  - If there are questions or concerns about the evaluation findings, the project sponsors should contact the Cadre member directly. Questions about project implementation should be sent to your [regional grants officer](#).
  - After the evaluation is complete, remember that Cadre members can continue to serve as a resource, sharing their expertise and discussing ways to strengthen or improve a project.
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For additional information, please contact the [Cadre of Technical Advisers](#).