



Annual Reunion of Rotary International Past Officers San Diego, 16-18 January 2016

San Diego Rotary International Assembly - 18-24 January 2016

The Reunion Wheel

Sunday morning, January 17, 2016

[Editor's Note: Wherever possible I have included any audiovisual materials available to me for this report, as well as resource materials from the Internet. Many of the photos of the Plenary presiders were taken by Rotarian Jim Bradford, District 5500. Sunday Afternoon's Plenary Session and Monday's Plenary Sessions will follow within the next few days. ~ Ron Goodsite]

Opening Plenary Session



PDG Philippe Lamoise

PDG Philippe Lamoise, 2016 POR Chairman, introduced D5340 Governor Janice Kurth, who welcomed all POR attendees to San Diego. She recounted how she as a new Rotarian had been invited into one of the past POR meetings and was inspired to do more as a Rotarian after she heard presentations by past RI Presidents Frank Devlin and Cliff Dochterman. Janice extended a personal invitation to enjoy the city of San Diego and its wonderful attractions and facilities. She noted that this upcoming week is Restaurant



DG Janice Kurth

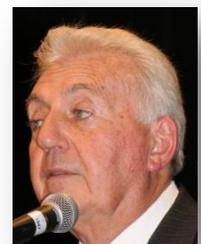
Recognition week in San Diego and that we should take advantage of the culinary benefits they all offer.

Plenary Session I: Polio Update – Pakistan: The Last Holdout



PDG Jim O'Meara introduced PDG Bob Scott, Chairman of the International PolioPlus Committee:

Bob was born and raised in Edinburgh, Scotland, and received a medical degree with distinction in dermatology and chest diseases from the University of Edinburgh in 1957. After his internship and two years of mandatory military service, he spent six years in general practice in North Wales. In 1966, Bob emigrated to Cobourg, Ontario, Canada, where he continued as a



PDG Jim O'Meara

general practitioner until 1994. He then served as medical director of a home for the elderly and other geriatric facilities until 1997. He was a coroner for the Province of Ontario and investigated more than 1,200 cases before retiring in May 2000.

In 2004, Bob served The Rotary Foundation as a Trustee and as Chair 2007-2008. In 2006, he began his term as chair of the International PolioPlus Committee. He also served as co-director of the 2002-2005 polio eradication fundraising campaign. A Paul Harris Fellow, Bob joined Rotary in 1971 and has served Rotary International as Vice President, Director, International Assembly group discussion leader, and District Governor. He is a recipient of the Queen’s Diamond Jubilee Medal, the Sitare-i-Khidmat from Pakistan and the Order of Chad, (Chevalier), the Outstanding Leadership Award from the United Nations Foundation, the Glen Sawyer Award from the Ontario Medical Association, and the 2006 YMCA Peace Medal. He has received the RI Service Above Self Award, The Rotary Foundation Citation for Meritorious Service, the International Service Award for a Polio-Free World, and the Four Avenues of Service Citation. He has been named an outstanding leader in polio eradication by the United Nations Foundation and has received the Glenn Sawyer Service Award from the Ontario Medical Association for professional and community achievement.

Bob is married to Ann, an honorary Rotarian, and both are members of the Arch Klumph Society.

Bob opened his presentation with a photo of caskets containing the bodies of health care workers slain last week in northern Pakistan:



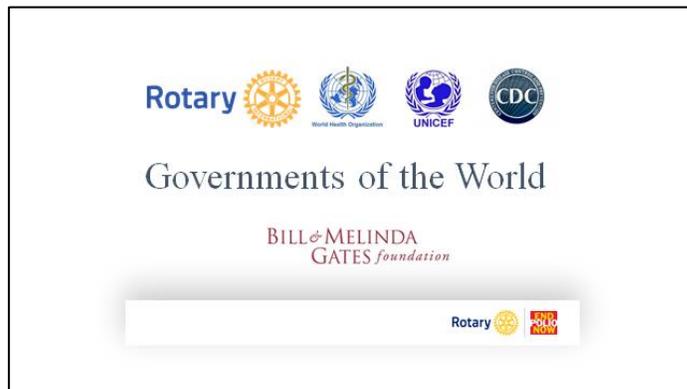
He stated that he had wished to have used this photo to open with instead:



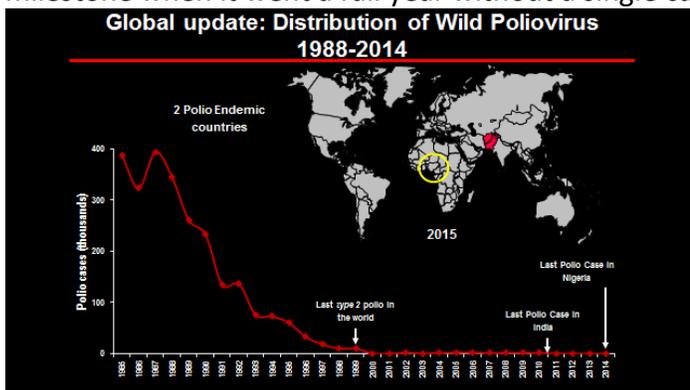
The Bill and Melinda Gates Foundation has generously provided a new challenge to help meet the U.S. \$1.5B funding gap in the strategic campaign to eradicate polio by 2018. Through June 2018, the first \$35

million donated via Rotary to the PolioPlus Fund each year will generate a \$2 matching contribution from the Bill and Melinda Gates Foundation. This is a fantastic opportunity for every participant to see his or her donations quickly expand to inoculate three times as many children.

\$1 donated through Rotary + \$2 contributed by Gates Foundation = \$3 total funding = 5 children inoculated. \$35 million donated through Rotary + \$70 million contributed by Gates Foundation = \$105 million total funding = 175 million children inoculated.



Thanks to UNICEF and partners' global immunization and vaccine efforts, polio has almost—but not quite—disappeared. In 1988 there were 350,000 cases; in 2012, only 223. In 2014, India joined the ranks of the polio-free; a major achievement thanks to lifesaving polio vaccines, and in 2015, Nigeria reached a milestone when it went a full year without a single case of polio.



But the highly-infectious, crippling and often fatal disease, to which children under 5 years of age are particularly vulnerable, remains endemic in Afghanistan and Pakistan, and is known to resurface in countries in conflict, where health systems are disrupted.

Continued support for [vaccinations](#) remains vital.

Country	Wild poliovirus		cVDPV	
	Onset of most recent case	Total WPV1	Onset of most recent case	Total cVDPV*
Guinea	NA	0	02-Oct-15	4
Nigeria	NA	0	18-May-15	1
Madagascar	NA	0	22-Aug-15	10
AFR		0	02-Oct-15	15
Pakistan	21-Nov-15	47	09-Feb-15	2
Afghanistan	19-Nov-15	19	NA	0
EMR	21-Nov-15	66	09-Feb-15	2
Ukraine	NA	0	07-Jul-15	2
EUR		0	07-Jul-15	2
Lao People's Democratic Republic	NA	0	28-Oct-15	5
WPR		0	28-Oct-15	5
Myanmar	NA	0	05-Oct-15	2
SEAR		0	05-Oct-15	2
Global	21-Nov-15	66	28-Oct-15	26

¹Excludes viruses detected from environmental surveillance.
²Onset of paralysis 06 January 2015 – 05 January 2016

*Total cVDPV in Madagascar, Ukraine, Laos, and DPRK in all other countries.
NA: most recent case had onset of paralysis prior to rolling 12 months.
Date in WHO HQ as of 05 January 2016

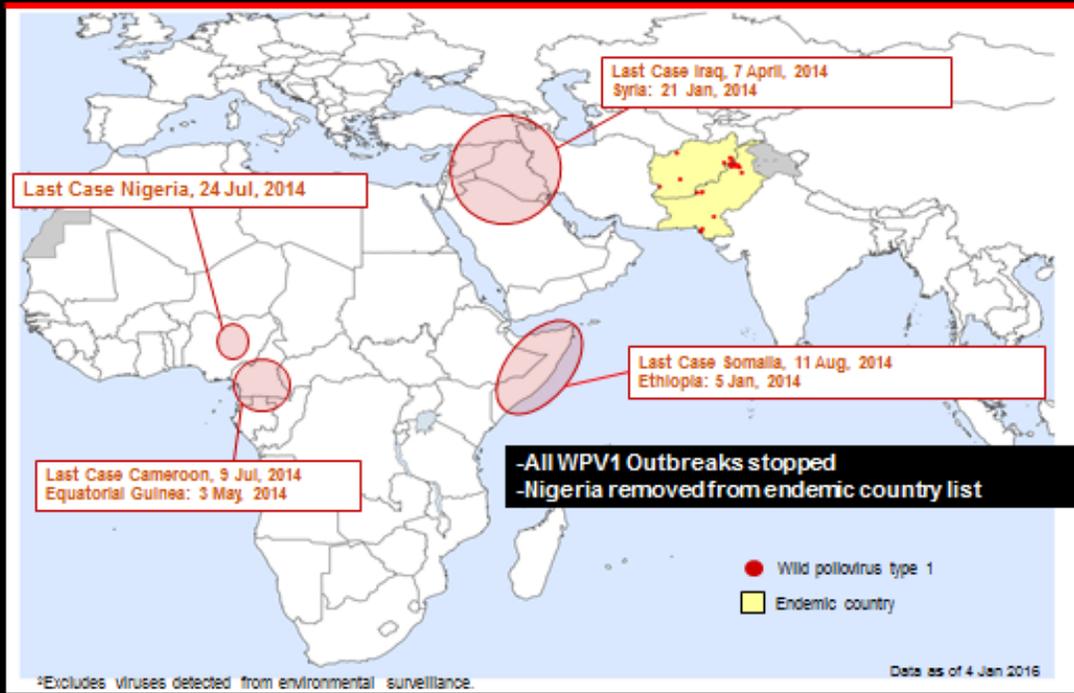
“Two hundred and ten (210) countries, territories and areas are now free of indigenous polio, and 145 of these have been certified polio-free by independent commissions.

In March 2014, the WHO South-East Asia Region was certified polio-free, joining the WHO Regions of the Americas, the Western Pacific, and Europe. August 2015 marked one year since the last case of wild poliovirus in Africa. If this progress can be maintained, the WHO Region of Africa will be declared polio-free in 2017.

Almost six billion people (90% of the world's

population) live in the 145 countries, territories and areas that are now certified polio-free.”

Current Situation: WPV1 in last 6 months



Dr Salk

IPV 1955

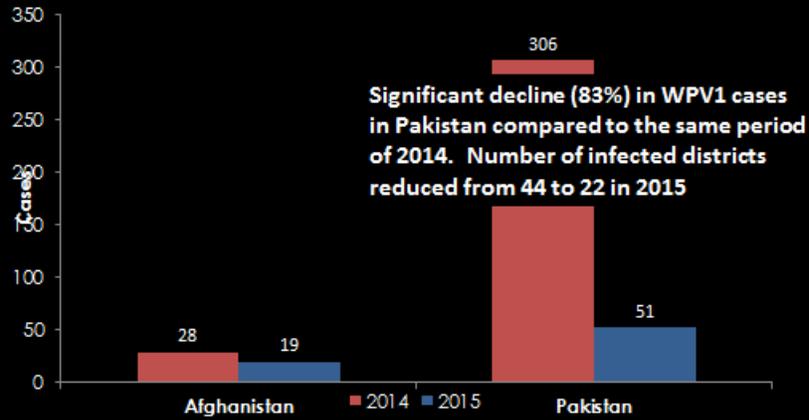


Dr Sabin

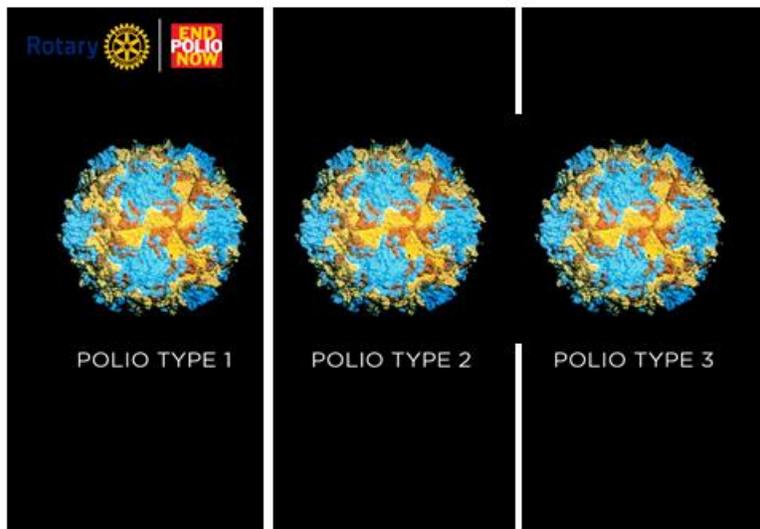
Oral 1960

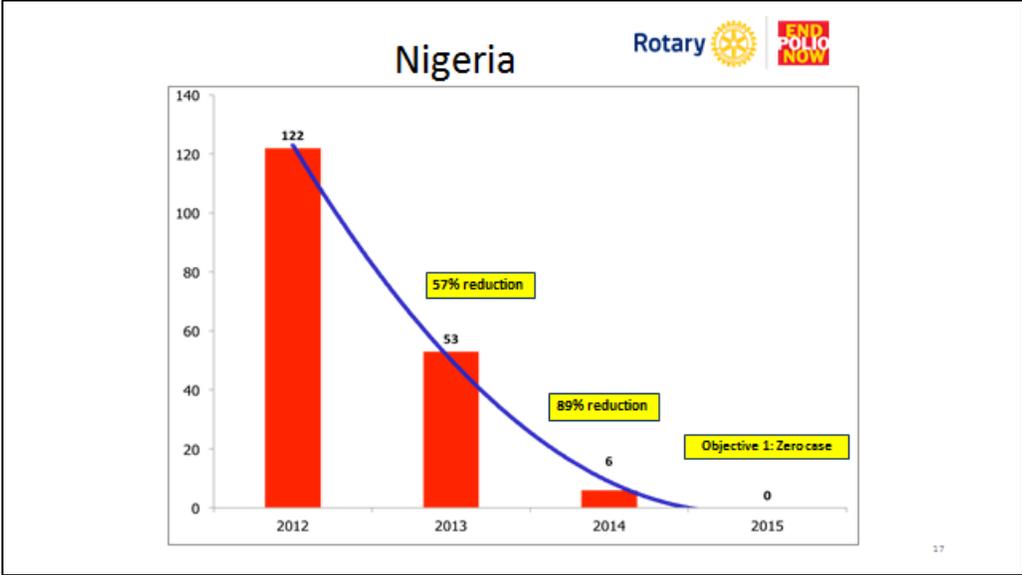


WPV1 Cases, Afghanistan and Pakistan, 2014 & 2015

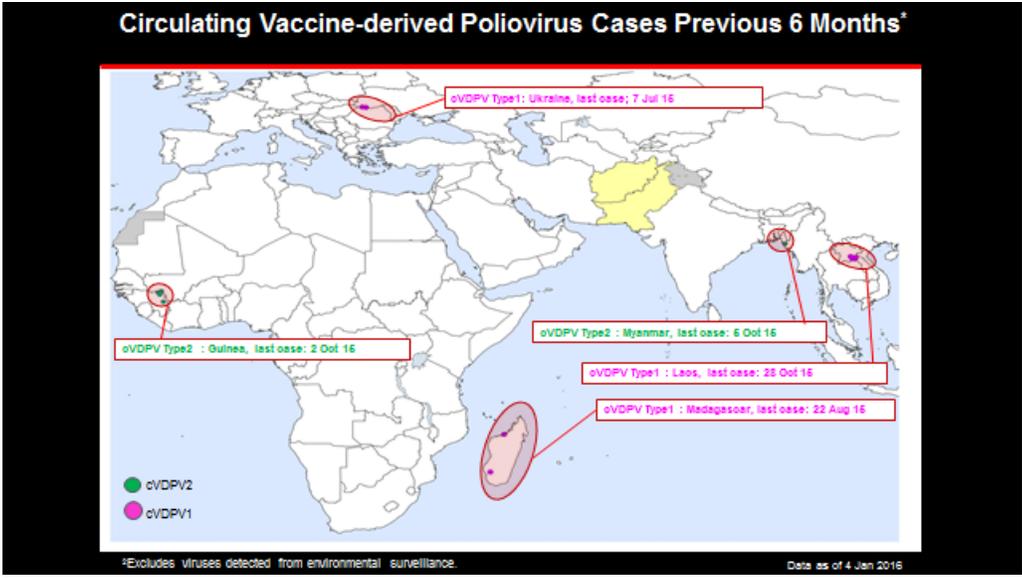
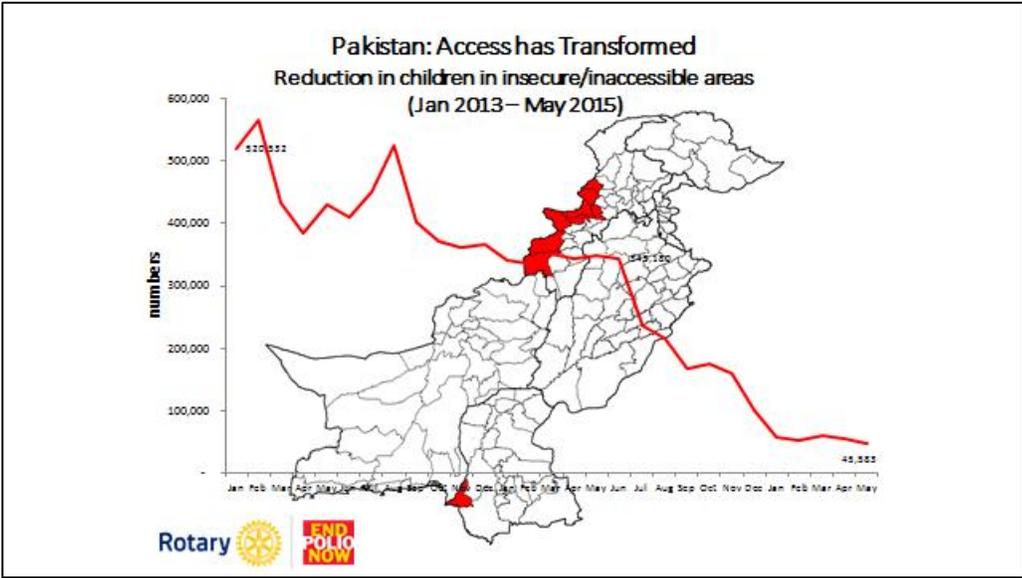


Polio Eradication Progress

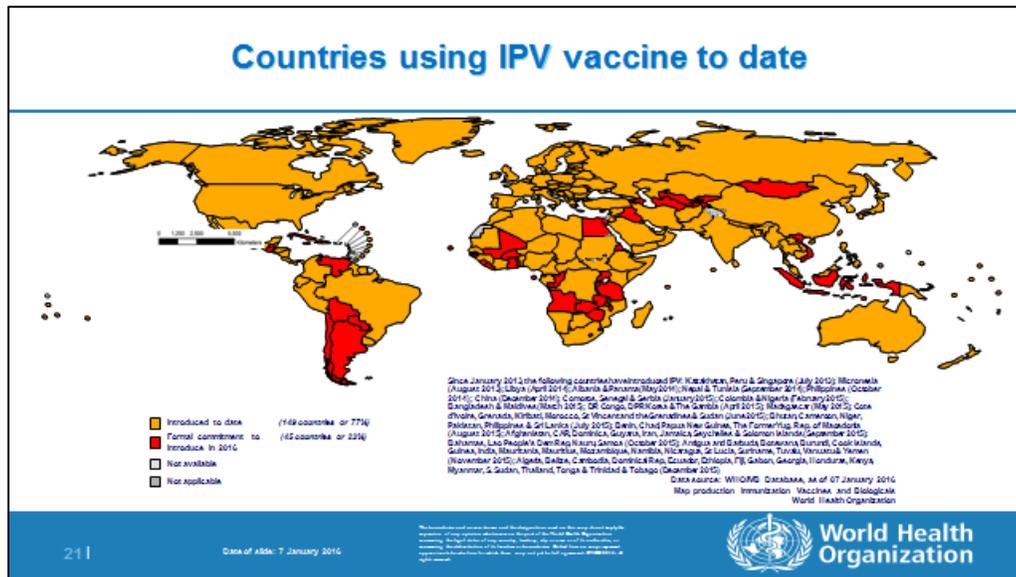




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- Switch from Trivalent to Bivalent
- Globally synchronized OPV2 withdrawal (April 17-May1 2016).
- Continued Introduction of IPV at least 1 dose as first dose



District goal =
20% of DDF per year

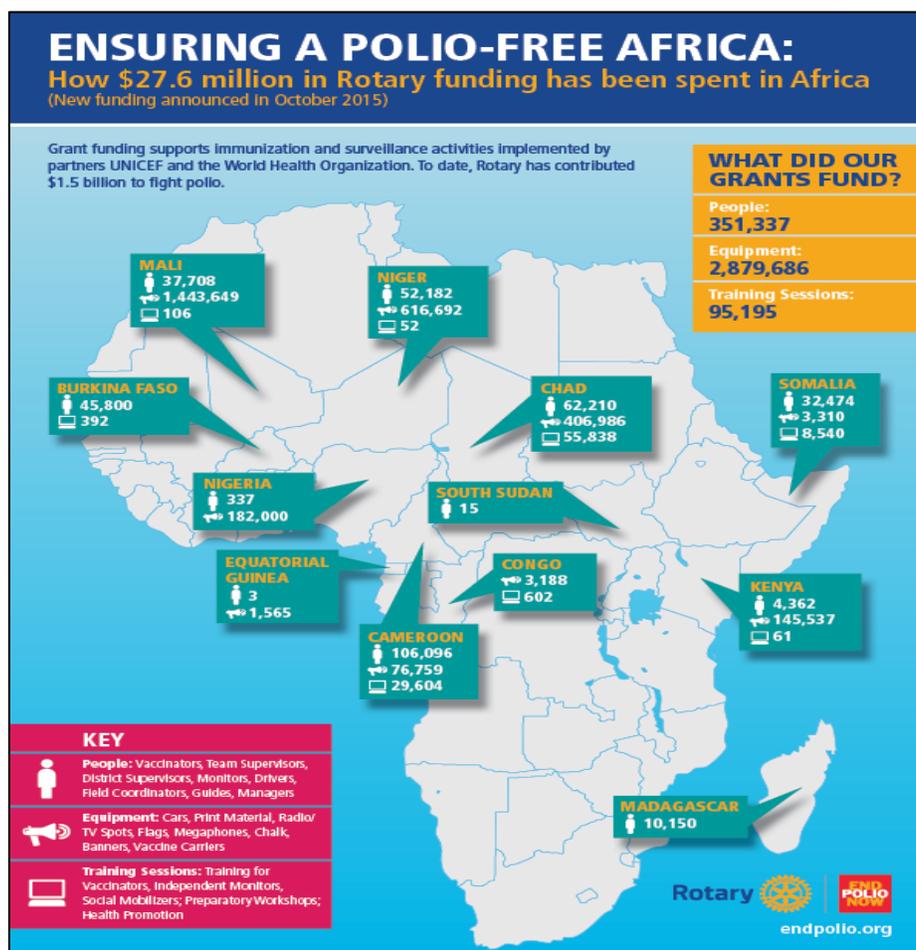
Club goal =
US\$1500 per year

Global goal is
US\$35 million
per year
through
2018

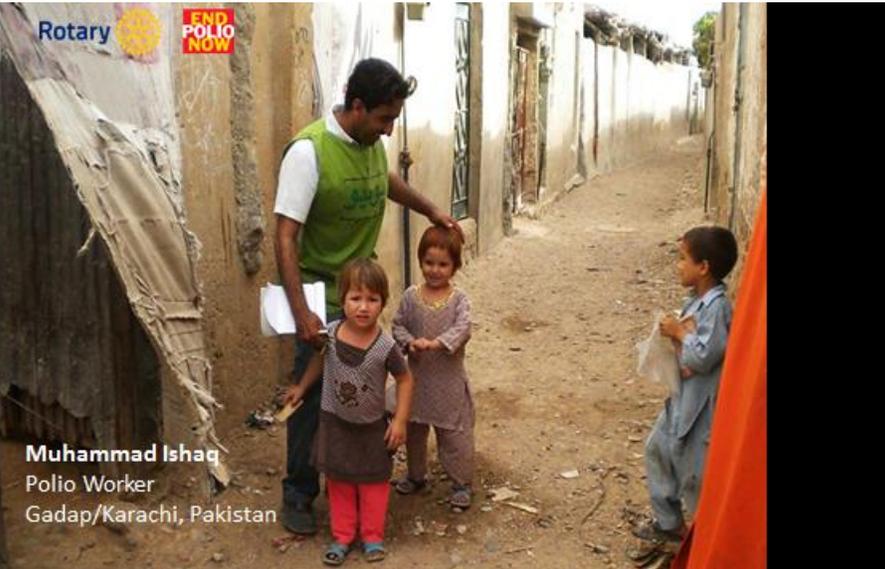
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As of Monday 11 January, 2016, IPPC Grants = 34.8 million USD



Rotary's funds will support efforts to end polio in the three countries where the disease has never been stopped: US\$ 8.1 million in Nigeria; US\$ 1.1 million in Pakistan and US\$ 6.7 million in Afghanistan. Additional funds will support efforts to keep other at-risk countries polio-free. The grants include US\$ 1.6 million, Cameroon: US\$ 2.5 million, Chad; US\$ 3.3 million, Democratic Republic of the Congo; US\$ 1.1 million, Ethiopia; US\$ 250 000, Kenya; US\$ 2.8 million, Niger; and US\$ 7 million, Somalia. In addition, grants totalling US\$ 321 000 will provide technical assistance in Africa.



Muhammad Ishaq
Polio Worker
Gadap/Karachi, Pakistan

Moments later...

Muhammad Ishaq was killed!





Bob Scott administering polio drops in Pakistan.
(Notice the guard with the rifle in the background, protecting Bob)



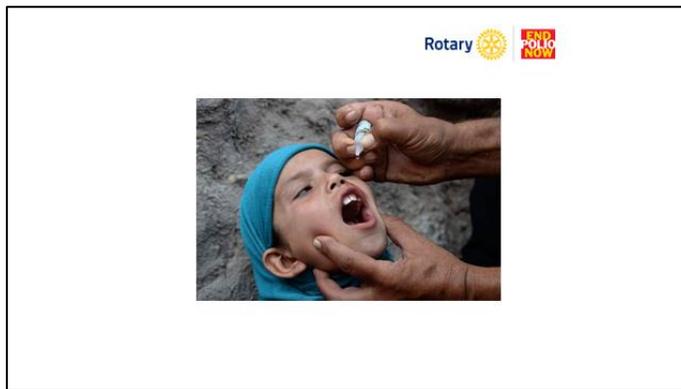
This school was next door to the vaccination center. Although girls were present in this classroom, they were purposely not included in the photo. The students were learning about Wordsworth, the poet.



The girl in this photo was playing a game of “give and take” with the flower bouquet. ***The bearded man with the hat looking on is the principal of the school. He was killed 3 months after this photo was taken.***



The Taliban in Afghanistan are in favor of vaccinating their children and work with UNICEF to accomplish this.



Recently-vaccinated children showing their gentian-violet dyed fifth finger to the photographer.



**Wearing nothing
but a “Mac!!!!”**



During the Question and Answer session following his presentation, Bob stated that:

- To date Rotarians have given USD \$1 Billion to the Polio eradication campaign.
- The ICPV will continue the Ride to End Polio in Tucson, Arizona, which this year raised USD \$4.5 million.
- We are also helping to provide for the needs of those children who have already been affected by the poliovirus.
- Polio workers have helped in the cause to eradicate Ebola from some areas. Nigeria was the first country to utilize their collective expertise and guidance to rid Ebola from its country.

Plenary Session II: Open World



Ambassador John O'Keefe, of Virginia, was introduced by PDG Marty Peters.

Ambassador O'Keefe is a Career Member of the Senior Foreign Service, Class of Minister Counselor. He was nominated on February 9, 2000 to serve as U.S. Ambassador to Kyrgyzstan and was confirmed by the Senate on June 9, attested by the President on June 14, and sworn in on July 27, 2000.



PDG Marty Peters

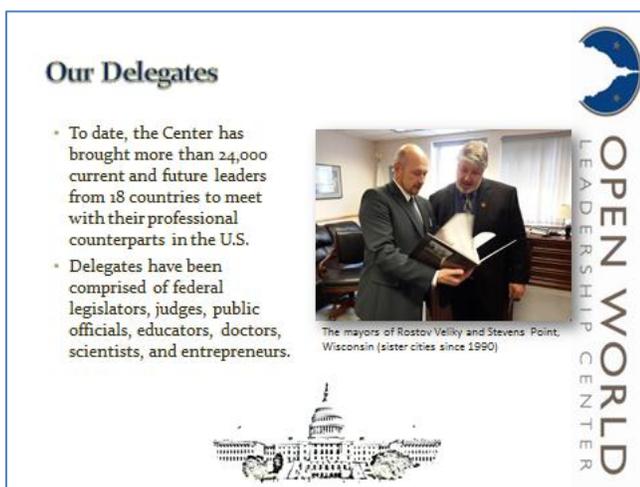
He has served in Russia, the former Yugoslavia, the Philippines, and Norway, and he has had domestic assignments in the Bureau of European Affairs and the Office of the Under Secretary of State for Management. While serving as Administrative Counselor in Belgrade from 1989 to 1992, Mr. O'Keefe was involved in ensuring the safety and security of employees during the conflict that affected the U.S. Embassy, our Consulate in Zagreb and American Centers in Skopje, Sarajevo, Ljubljana, and Podgorica. Following this assignment, Mr. O'Keefe, in his role as Deputy Executive Director for European Affairs, was instrumental in establishing, staffing and providing infrastructure for sixteen embassies in the Newly Independent States of the former Soviet Union and in

Eastern Europe. As Minister Counselor for Administration at the U.S. Embassy in Moscow, Mr. O'Keefe was involved in the reconstruction of the secure chancery building which had been compromised by Soviet intelligence in the 1980s. He then served as the Department of State's Special Representative for the Year 2000.

Mr. O'Keefe has received two superior honor awards, three meritorious honor awards, and the Replogle Award for Management Improvement. He has served as the Treasurer, International School of Belgrade; Vice President of the Board, International School of Manila; and Chairman of the Board, Anglo-American School of Moscow.

Mr. O'Keefe has a B.S. in Business Administration, Loyola College, Baltimore, Maryland, and a Master of Public Administration, Harvard University. His languages are Russian and Serbo-Croatian.

The Open World Leadership Center...



Our Delegates

- To date, the Center has brought more than 24,000 current and future leaders from 18 countries to meet with their professional counterparts in the U.S.
- Delegates have been comprised of federal legislators, judges, public officials, educators, doctors, scientists, and entrepreneurs.

The mayors of Rostov Veliky and Stevens Point, Wisconsin (sister cities since 1990)

OPEN WORLD LEADERSHIP CENTER

...administers the Open World program, one of the most effective U.S. exchange programs for countries of the post-Soviet era. The program has enabled more than 24,000 current and future leaders from Azerbaijan, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Ukraine, Tajikistan, and Turkmenistan to meaningfully engage and interact with Members of Congress, Congressional staff, and thousands of other Americans, many of whom are the delegates' direct professional counterparts.

The Open World program focuses both on assisting the Congress in its oversight responsibilities and on

conducting exchanges that establish lasting professional relationships between the up-and-coming leaders of Open World countries and Americans dedicated to showcasing U.S. values and democratic institutions. The Center's bipartisan nature and independence from the priorities of any presidential administration is an important asset for the program.

Aimed at establishing mutually beneficial relationships between future leaders of other nations, Open World is a value-added program that permits practical and depoliticized options for engagement. Open World is extremely cost-effective and unencumbered by bureaucracy, and serves the Legislative Branch as a program that offers Members of Congress the opportunity to meet with their colleagues from Eurasia. In this capacity, Open World is an important resource for Members of Congress. Open World Leadership Center enhances U.S. foreign policy objectives in building more secure, democratic, and prosperous societies.

Open World offers an extraordinary "bang for the buck" in terms of efficiency, cost-effectiveness, and value. The Center boasts an overhead rate of about 7 percent, every grant contains cost-shared elements, and more than 75 percent of our appropriation is plowed back into the American economy every year. The Center might best be described as both a mini-stimulus plan as well as a true international exchange program.

Our Mission

Serving at the direction of the Congress, the Open World Leadership Center introduces rising leaders of emerging democracies to legislative functions essential to democracy.

With a mission to enhance understanding and capabilities for cooperation between the United States Congress and emerging democracies worldwide, the Center maintains a network of leaders in countries crucial to American national security who have gained significant, firsthand exposure to America's democratic government and free-market system.



MPs from the Kyrgyz Republic in the Utah State Legislature



Mission Statement:

To enhance understanding and capabilities for cooperation between the United States and the countries of Eurasia by developing a network of leaders in the region who have gained significant, firsthand exposure to America's democratic, accountable government and its free-market system.

Open World History

Begun as a pilot program in 1999 and established as a permanent agency in late 2000, the Center conducts the first and only international exchange agency in the U.S. Legislative Branch. Since its 1999 inception, the Center has awarded grants to 61 organizations headquartered in 25 different states and the District of Columbia.

These grantee organizations host delegations themselves or award sub-grants to local host organizations to do so. By the end of 2011, some 800 local host organizations—including universities and community colleges, Rotary clubs and other service organizations, sister-city associations, and international visitor councils and other nonprofits in all 50 states and the District of Columbia—had conducted Open World exchanges for the Center. Some 8,000 American families have hosted participants in more than 2,400-plus communities around the country.

Participating Countries:

1. **Armenia** (2010) Situated between Turkey, Georgia, Azerbaijan, and Iran, this historic Christian kingdom is currently a modern parliamentary democracy with an unresolved border conflict. Open World has hosted 53 delegates from Armenia since 2010 for themes including Rule of Law, Citizen Advocacy, and Local Governance.
2. **Azerbaijan** (2007) This strategically located, oil-rich, predominantly Muslim, South Caucasus nation began participating in Open World in May 2007. There have been 245 delegates hosted for diverse themes such as accountable governance aimed at promoting transparency, trafficking in persons, and agro-business development. Among the first delegates were the president of the Azerbaijan Lawyers Association, the chief political correspondent for a Baku-based newspaper, and a top parliamentary aide. Open World's Azerbaijan programming has focused primarily on accountable governance, aimed at promoting transparency and civil and media rights.
3. **Egypt** (2013) A geographic bridge linking Africa and Asia, this ancient land is currently in the midst of yet another conflict between secularists and Islamists, and liberal and conservative factions. Our first delegations from Egypt were made up of members of the judiciary striving to maintain their independence from executive influence and politics.



Kosovo MPs with Iowa Governor Terry Branstad



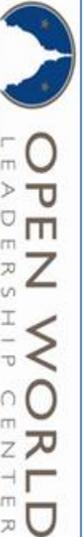
Ukrainian Healthcare professionals with Speaker Pro Tempore of the Florida House of Representatives Matt Hudson

Background

The Open World Leadership Center was opened in 1999.

Created by Russian Academician Dmitry Sergeevich Likhachev and Dr. James H. Billington, Former Librarian of Congress and Founding Chair of the Open World Board of Trustees.

Open World is the first and only international exchange agency in the U.S. Legislative Branch.



4. **Estonia** (2013) This small Baltic country lies on the Gulf of Finland between Russia and Latvia. Open World welcomed its first Estonian delegates in the spring of 2013, when the program hosted three judges and one prosecutor in partnership with the Supreme Court of Estonia.
5. **Georgia** (2007) The small, mountainous nation of Georgia lies between Russia and Turkey and at the crossroads of Europe and Asia. Open World launched its Georgia program in February 2007, hosting a group of legal leaders and local officials. Georgia is the third largest Open World country by number of alumni (535 since 2007) and one of its most active. Open World supports a number of partnerships between Georgia and the United States, including the Georgia to Georgia Foundation. Current exchanges support Georgia's initiatives to reform public administration and education, and to prepare for the introduction of jury trials.
6. **Kazakhstan** (2008) The second-largest Open World country after Russia, Kazakhstan is resource-rich, ethnically diverse, and strategically located between Europe and Asia. Rule of law was the focus of Open World's early 2008 programming for Kazakhstan, in support of efforts to strengthen judicial independence and reduce corruption. Upcoming exchanges for Kazakhstan will target e-governance professionals, federal health officials and practitioners, and women economic and educational leaders.
7. **Kosovo** (2014) The small and young Republic is located in southeastern Europe. Open World expects to host its first group of young emerging leaders from Kosovo in early 2014, with representation from the country's legislative and executive branches and civic leadership. Since 2014, Open World has already hosted 70 delegates from Kosovo for programs on a variety of themes, including agro-business development, minority relations, and NGO management.
8. **Kyrgyzstan** (2007) This mountainous, predominantly Muslim Central Asian nation began taking part in Open World in June 2007. Four members of parliament were among the participants in the first exchange, which focused on implementing human rights legislation. Rule of law issues are a major theme for current visits. Through these exchanges, Open World seeks to assist Kyrgyzstan in introducing jury trials, tackling corruption, and improving access to justice. The Open World Leadership Center's executive director is a former U.S. ambassador to Kyrgyzstan. Kyrgyzstan has sent 409 delegates to the United States since 2007 and is one our best partners in the region.
9. **Lithuania** (2004) The 97 participants who benefited from Open World's Lithuania program included a parliamentary adviser, mayors, NGO leaders, agriculturalists, journalists, business executives, and environmental and youth activists. Participants came from 9 of Lithuania's 10 counties for professional exchanges conducted in 12 U.S. states and the District of Columbia. The main focus areas for these visits were community development, education, entrepreneurship, environmental and rural issues, independent media, NGO development, and youth issues.
10. **Moldova** (2007) Open World launched its program with this small, economically struggling Eastern European nation in March 2007. Although small in size, Moldova has a sizeable number of very active alumni (434) that has grown since it began participating in 2007. Among the early Moldovan participants were newly elected small-town mayors, top anti-human trafficking officials, legal aid providers, and tuberculosis specialists. One emphasis of Open World's current program with Moldova is agribusiness. While the landlocked, largely agrarian country boasts some of Europe's most fertile soil, the agricultural production and marketing system needs modernizing. Accountable governance is another Open World focus, to help government bodies at all levels increase transparency, curb corruption, and foster a culture of public service. Public health constitutes a third main program area for Moldovan exchanges, to support the country's efforts to reduce high HIV and hepatitis infection rates and improve access to primary care.

11. **Mongolia** (2013) Flanked by two major countries, Mongolia has been both a buffer and a conqueror since the days of Genghis Khan. Traditionally known as pastoral nomads, today nearly half of all Mongolians live in the capital city of Ulaanbaatar. About 59 percent of the population is under the age of 30. The majority of the 43 delegates from Mongolia hosted since 2013 have been judges.
12. **Russia** (1999) Open World's original focus country has been sending emerging leaders to the United States since July 1999. Russia's nearly 19,000 participants have come from all of the country's 83 regions (in relative proportion to the populations of Russia's seven large political entities), with heavy representation from national leaders, regional and local governments, the judiciary and legal professions, and the health, education, and social services sector. The Russia program currently operates exchanges on the themes of accountable governance, rule of law, and social issues. Congress in 2003 established a separate Open World program for Russian cultural leaders. Open World visits are designed to promote professional or community partnerships that continue beyond the actual visit.
13. **Serbia** (2012) Located in the heart of the Balkans between Central and Eastern Europe and having experienced a tumultuous history, Serbia is now on the path toward stability, a progressive outlook, and membership in the European Union. Open World's first programs for Serbia covered the rule of law, management of cultural institutions, and the importance of civic associations in a democracy.
14. **Tajikistan** (2007) Open World's first delegates from this rugged, agricultural Central Asian country—four environmental officials and four defense lawyers—arrived in the United States in June 2007. Since then, the program has conducted exchanges for bar association leaders, microfinance experts, water management officials, and senior law enforcement officials, among others. Open World's current programming for Tajikistan emphasizes rule of law, education, public health, and civic participation and elections, and is aimed at supporting efforts to reduce public corruption and widespread poverty.
15. **Turkey** (2013) An ancient civilization at the crossroads of Europe and Asia, the modern Republic of Turkey evolved under the leadership of Ataturk, who was determined to create a secular society in the Muslim world. A formal agreement between the High Council of Judges and Prosecutors of Turkey and the Open World Leadership Center has laid the foundation for rule of law exchanges between our countries.
16. **Turkmenistan** (2008) An important region along the Silk Road in ancient times, today's Turkmenistan is known for its petroleum and natural gas reserves and cotton production. Open World welcomed its first delegation from Turkmenistan in October 2008. Annual exchanges have focused on support for small businesses, civil service reform, cultural promotion, and education.
17. **Ukraine** (2003) Ukraine, Europe's second-largest country and a key nation in the future of the region, has participated in Open World since December 2003. The Ukraine program is Open World's second-biggest and second-oldest continuing exchange. Open World's 850-plus Ukrainian alumni have come from all of the country's 27 regions and include Supreme Court justices, journalists, judges, lawyers, election experts, and NGO representatives. Programming focuses on accountable governance, NGO development, rule of law, and education, and aims to support Ukraine's marked progress toward full democracy.
18. **Uzbekistan** (2003) Open World brought 93 current and future Uzbek leaders to 15 U.S. states for exchanges focused on economic development, health, media, and the rule of law. Participants came from the Constitutional Court, the ministries of finance and public health, the Central Bank of Uzbekistan, Radio Tashkent, and other government agencies and media outlets, as well as nonprofits

and businesses across the country. Among the outcomes of these visits: a journalist for a state-run radio channel returned to focus media attention on the issue of human trafficking; the head of the Agro-Industrial Stock Exchange in Tashkent led a successful effort to introduce online trading as a result of visiting the Kansas City Board of Trade; and a doctor in the populous Ferghana Valley briefed 45 of her colleagues on the advanced neonatal techniques she had seen practiced at a Tampa, Fla. hospital.

With the power of the 2,000 communities throughout America that have participated over the life of the program, the Center enhances professional relationships and understanding between political and civic leaders of participating countries and their counterparts in the United States. It is designed to enable emerging young leaders from the selected countries to:

- observe U.S. government, business, volunteer, and community leaders carrying out their daily responsibilities;
- experience how the separation of powers, checks and balances, freedom of the press, and other key elements of America's democratic system make the government more accountable and transparent;
- develop an understanding of the U.S. free enterprise system;
- learn how U.S. citizens organize and take initiative to address social and civic needs;
- participate in American family and community activities; and
- establish lasting professional and personal ties with their U.S. hosts and counterparts.

Because Open World provides such high-caliber programs, participants return to their countries with a tangible appreciation of America's democracy and market economy. To that end, Open World has refined and focused on key themes central to democracy-building to improve the quality of the U.S. program. The impact of the 10-day U.S. stay is multiplied by continued post-visit communication between participants and their American hosts, their fellow Open World alumni, and alumni of other U.S. Government-sponsored exchange programs.

The Center regularly evaluates program performance to ensure that Open World is meeting its mission of focusing on a geographically and professionally broad cross-section of emerging leaders who might not otherwise have the opportunity to visit the United States:

- Since the program was established with Russia in 1999, the Open World program has now hosted emerging leaders from almost all the countries of the former Soviet bloc. The program added Ukraine in 2003. In 2007, Open World expanded to Azerbaijan, Georgia, Kyrgyzstan, Moldova, and Tajikistan. Open World's Kazakhstan and Turkmenistan programs began in 2008; its Armenia program was launched in 2011. In 2012, the program welcomed its first delegations from Serbia. Open World has also hosted delegations from Belarus, Lithuania, and Uzbekistan.
- Over 80 percent of Russian participants live outside Moscow and St. Petersburg.
- More than 60 percent of Open World delegates have been federal, regional, or local government officials at the time of their visit.
- 1,645 Russian and Ukrainian judges have been hosted in U.S. courts and communities as part of Open World visits focused on the rule of law. Another 145 judges from Azerbaijan, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Tajikistan, Turkmenistan, and Uzbekistan have taken part in Open World rule of law programs.
- Open World has brought 155 members of the Russian Federation Council and State Duma to the United States. Members of the national parliaments of Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Turkmenistan, and Ukraine have also participated in the program. Of the Russian Duma members elected in December 2011, 27 are Open World alumni.

- Over 90 percent of delegates are first-time visitors to the United States.
- Over half of all delegates are women. (Women did not have significant leadership opportunities in the Soviet Union.)

Open World in America

Open World delegates are hosted by a large and dedicated group of American citizens who live in cities, towns, and rural communities throughout the United States:

- Since Open World's inception in 1999, more than 7,100 families have hosted participants in 2,000 communities in all 50 states.
- In 2011, the 204 locally based Open World host organizations included universities and community colleges, library systems, Rotary clubs and other service organizations, sister-city associations, courts, and nonprofits.
- Over 150 U.S. federal and state judges have hosted their counterparts from Open World countries.

The generosity and enthusiasm of our American hosts is a mainstay of the program. In 2010, Americans gave \$1.72 million worth of in-kind contributions to the Open World representing 34% of the total cost of the hosting program. Other partners provided an additional \$580,000 in in-kind contributions.

Visiting delegates, in turn, have enriched American communities by sharing ideas with their professional counterparts, university faculty and students, governors and state legislators, American war veterans, and other American citizens in a variety of forums such as group discussions, Rotary Club breakfasts, and town hall meetings.

- A Ukrainian television reporter established an investigative journalism NGO based on his observations of a student-journalist project at Carrolton College in Atlanta, Georgia, which he visited during his Open World exchange. The organization focuses on investigating and reporting on human rights violations. He is now turning his efforts to involving young, socially active Ukrainians in the political and governing processes through an organization called "SAN" (Self-Governed Alternative Network). The Network plans to support candidates for the fall parliamentary elections.
- The southern Moldovan city of Cahul is benefiting from two projects initiated by an Open World alumnus, hosted in Madison, Wisconsin in 2009, who is both a city councilman and NGO administrator. The Cahul governmental authorities and local NGOs are collaborating on a project called "Cahul – Youth Capital of Moldova 2012" to promote activities for youth. The second project is supported by a grant from the U.S. Embassy and involves the establishment of a park between two housing projects, promoting its use for recreation, and encouraging volunteerism to maintain the park.
- Two Tajik Open World alumni, one hosted in Princeton, West Virginia and the other in St. Louis, were instrumental in the opening of "Window to America" and "American Corners" centers in their respective home cities. Both alumni worked with the local Tajik government to obtain rooms and other support for these learning centers that now bring to the local population information about America and English language training through further support by the U.S. Embassy.

Results such as these solidify the importance of these countries' participation in the Open World program. Furthermore, Open World provides on-going benefits to the U.S. economy through such activities as purchases of equipment in the U.S. by Open World alumni and follow-on exchange visits to the United States initiated by contacts made through Open World. An example of the latter is an education

exchange for children from Nadezhdinskiy, Russia planned for this summer by Open World American hosts associated with People-to-People International in Scottsdale, Arizona. Besides learning English during their stay in Arizona, the group will visit Las Vegas, San Diego, and Los Angeles.

- The Open World program hosted the first delegation of members from the new Parliament of Kyrgyzstan, elected in October 2010. During their stay in Washington, DC, they met with numerous Members of Congress and observed a session of the House of Representatives, presented at a roundtable at Johns Hopkins University School of Advanced International Studies (SAIS) where they provided each of their political party's view of the only fully democratic country in the region. They were also hosted in Pittsburgh and Harrisburg, PA where the delegates observed the legislative process at the city and state levels.
- In May 2011, Rep. Renee Ellmers (NC) served as the congressional host for two Moldovan parliamentarians examining accountable governance in the Raleigh area. The Moldovans had discussions with Rep. Ellmers and several state legislators about their duties and office operations; viewed state legislative proceedings; heard about the role of the state Secretary of State's office; and learned about the preservation of parliamentary documents and the state legislature's online resources. North Carolina and Moldova have a formal "sister state" relationship.
- The U.S. Mission in Ukraine turned to the Open World Program in September 2011 to host Parliamentarian Lesya Orobets and directly funded this hosting program. During her visit, Deputy Orobets met with Congressional Ukrainian Caucus Cochair Rep. Marcy Kaptur (OH) for a peer-to-peer conversation about economic development, current affairs, and representative government. Deputy Orobets chairs an education subcommittee and is fighting for greater transparency in the education system. She is also a pioneer in using social media to communicate with the Ukrainian electorate.

Other Program Highlights

Russia and Tennessee: Senator Lamar Alexander requested that Open World host health care leaders from Kirov, Russia in three locations in Tennessee. This nascent Tennessee-Kirov relationship was spearheaded by former U.S Senate Majority Leader William H. Frist, MD, an original member of Open World's Board of Trustees. Before travelling to Knoxville and Memphis (half to each), the 25 doctors, including the Minister of Health of Kirov Oblast, took part in a panel discussion on health care in the U.S. at the Center for Strategic and International Studies and toured the National Institutes of Health. The Memphis group had an intensive program at several research hospitals and concluded the program with presentations to their counterparts. The Knoxville group visited a university medical center and nursing schools. In Nashville, the two groups reunited for an examination of the Vanderbilt Medical Center led by Dr. Frist, and had exchanges with Congressman Jim Cooper, the Mayor of Nashville and the Tennessee Commissioner of Health.

Kyrgyzstan and Montana: In March, Bozeman, Montana hosted a mayor and several local lawmakers from Kyrgyzstan for an accountable governance exchange. The delegates discussed mayoral duties, the role of the city commission, and citizen engagement with Mayor Jeff Krauss; reviewed infrastructure development with a city planning-department official; and met with an aide to the city manager. The delegates also learned about attracting business to rural areas at the Chamber of Commerce, explored how Montana State University's Local Government Center assists local governments in the state, and took part in the biennial Montana Mayors Forum in Helena.

Ukraine and Virginia: On March 4, 2011, the Arlington (Virginia) Sister City Association held an official signing ceremony with its newest sister city, Ivano-Frankivsk, Ukraine. This partnership was formalized as

a result of Open World, through which several delegations from Ivano-Frankivsk were hosted in Arlington, allowing the two cities to further develop strong ties in governance, social programs, and other areas. Yulia Melnyk, a Washington, D.C.–based correspondent for the Kyiv Post, has praised the partnership between the two cities for including an economic component intended to boost cooperation between Ukrainian and U.S. businesses.

Georgia and Georgia: In Atlanta, private and government lawyers from the Republic of Georgia observed jury selection and part of a criminal trial in federal court (Georgia is just beginning to use jury trials); received an in-depth review of criminal-trial, appellate, and post-conviction proceedings from a principal of the Maloy Jenkins & Parker law firm; and attended a class at Emory University School of Law. A tour and Q&A session at the federal penitentiary was also timely, as prisons in Georgia’s capital city of Tbilisi are implementing new regulations and practices. Rep. Phil Gingery met with the delegates in Marietta.

Armenia and Iowa: During her visit to Iowa as part of the first Open World delegation from Armenia, a newspaper reporter who covers political and government issues, was eager to see the impact of American media on social issues. Having seen how Americans respect their laws and the judicial system, the delegate explained this to her fellow Armenians in the article “The U.S. Constitution is about Freedom of the Individual.” In another article “Where the Law Ends, Tyranny Starts,” she describes how ordinary citizens have access to Iowa leaders and are able to follow transparent decision-making processes. In subsequent articles, the reporter published an interview with a Des Moines Register reporter and other articles on human trafficking, human rights, and domestic violence. Ten days in the United States gave our delegate a chance to create an unbiased glimpse of America and Americans for a broad audience in Armenia.

In November, five Open World delegations from the Russian republic of Buryatia traveled to the United States for programs that were partially funded by the Russian ERA Foundation, whose founder, Senator Vitaly Malkin, represents Buryatia in the Russian parliament. Individual delegations visited **Illinois, Maryland, Michigan, Nebraska, and Ohio**. Further financial support for the delegation to Omaha, NE was provided by the Suzanne and Walter Scott Foundation. University agricultural experts visited soil-testing facilities, discussed international operations and marketing at an agriculture company, examined no-till farming at the University of Nebraska, and discussed federal agricultural programs with an aide to Senator Ben Nelson.

Open World spends its appropriation in two categories: Direct Program Costs and Administration Costs. Direct Program Costs includes: grants to host delegations in the United States; a logistical coordinator; and the direct program portion of salary and benefits of D.C. and Moscow staff. This is the minimum staff level required to manage 1,200 participants in a program year. Administration Costs refer to the expenses related to the operations of the Open World Leadership Center, including but not limited to partial salary/benefits for some staff; services of the Library of Congress, where Open World is physically located; professional services contracts for a grants administrator and writer-editor; and office supplies, materials, and other miscellaneous expenses.

Where We Work



- Open World is active in *Armenia, Azerbaijan, Georgia, Kazakhstan, Kosovo, Kyrgyzstan, Moldova, Russia, Serbia, Tajikistan, Turkmenistan, and Ukraine.*
- Open World has also hosted delegates from *Egypt, Estonia, Lithuania, Uzbekistan and Turkey.*



OPEN WORLD
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The Future of Open World



- In concert with the House Democracy Partnership and Senate Office of Inter-parliamentary Affairs, Open World will soon be preparing to receive delegations from *Afghanistan, Colombia, Haiti, Indonesia, Iraq, Kenya, Lebanon, Liberia, Macedonia, Myanmar, Pakistan, Peru, Timor-Leste, and Tunisia.*



OPEN WORLD
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Open World and Rotary

- 253 individual Rotary Clubs in 47 states have hosted over 3,600 participants from 13 countries since the program's inception.
- Rotary hosted 750 delegates the first year alone.
- This amounts to 15% of all Open World delegates.



Young professionals from Tajikistan in Bedford, Texas



Women Leaders from Russia in Reno, Nevada



Women Entrepreneurs from Russia in Madison, Wisconsin



OPEN WORLD
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Rotary Club Cities Hosting for Open World



Grantee of the Year



L-R: Senator Ted Stevens, Past Rotary International Director Grant Wilkins, Rotary Foundation Trustee Carolyn Jones, Former Librarian of Congress James T. Billington

OPEN WORLD
LEADERSHIP CENTER

Open World Impact on Rotary



- Open World programs strengthen twin club partnerships expanding Rotary's reach to countries that had been inaccessible until 25 years ago.
- The number of chartered clubs in Russia has grown from 20 in 2000 to more than 80 today.



OPEN WORLD
LEADERSHIP CENTER

Rotary's impact on Open World



OPEN WORLD
LEADERSHIP CENTER

- Rotary has nominated over 1,000 individuals for Open World programs.



Russians nominated by Rotary, hosted by Pleasantville, Ossining Rotary Club



Russian Education Ministers hosted by Rotary in Honolulu, Hawaii



Russian women - professionals from Buryatia exchange flags with the Metairie Rotary Club

The Open World Program



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- Open World delegations consists of committed leaders who experience in-depth programming in themes of interest to Congress and of transnational impact, including human-trafficking prevention, government and court transparency, nuclear nonproliferation, healthcare and environmental protection.



Water and Hydropower in Denver, CO with delegates from Tajikistan

2-day Orientation in Washington, DC



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A lecture by Georgetown Professor John Brown, PhD.



Russian Lawyers with Rep. Tom Cole (OK 4th District)



Members of the Serbian parliament with Rep. Danny Davis (IL 7th District)



Delegation from Tajikistan focusing on domestic violence prevention in the office of Senator Martin Heinrich (NM)

Pluralism and Integration in Del Mar, California

- In February 2015, the Del Mar Rotary Club Hosted delegates nominated by its twin club in Grozny, Chechnya (Russia).



Pluralism and Integration in Del Mar, California



At the International Rescue Committee



At the Catholic Charities Diocese of San Diego



Rotary meeting at Hotel Del Coronado.



At a Boys and Girls Club



Del Mar - Grozny

- With financial support from the Del Mar Rotary Club, the Grozny club delivered winter clothes and shoes to poor families before an unusually cold winter.



Rotary International District 2220 Foundation Chair Aslan Guliev.



A young girl also received treatment for a respiratory problem.



Public Health in Alaska

- In May 2015, a delegation of three doctors, an educator, and a journalist from the Yakutsk Rotary was hosted in Alaska by the Rotary of Homer-Kachemak Bay.



- The group visited several medical centers and also learned about Homer's annual Health Fair, sponsored by Homer-Kachemak Bay Rotary, a model used globally for community health fairs.



Public Health in Alaska



Providence Medical Center



At the office of US Sen Lisa Murkowski



Banner exchange with the Anchorage club.



Homer, AK is twinned with Yelizovo, Kamchatka Krai.

“There was discussion of Tuberculosis Prevention programs which could be supported with a large Rotary Global Grant.”

Rule of Law in Oklahoma City

- Rotary helps maintain the ongoing partnership between the University of Oklahoma College of Law and the Lobachevsky State University Faculty of Law in Nizhny Novgorod, Russia.



- 5 Russian lawyers were hosted by the Oklahoma City Rotary and Federal Judge Stephen Friot in October, 2015.

Rule of Law in Oklahoma City



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At the Deer Time Ranch



Luncheon with the Oklahoma City Federal Judiciary



The delegates with Justice Yvonne Kauger, in her dining room



In the courtroom of District Judge Ray Elliot

Chief Judge Vicki Miles-LaGrange says: "This program makes me a better judge"

Challenges: Information War



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"Why Did USA Give \$560,000 Yakutia Rotary Club for Nothing in Return?"



"If begin with historical context, American Rotary clubs, which are financed by the U.S. State Department, appeared in Russia in 1990. The first clubs were opened in the capital of Russia – Moscow and St. Petersburg. Currently around 100 Rotary Clubs operate from Kaliningrad to Vladivostok with funds from the United States' budget."

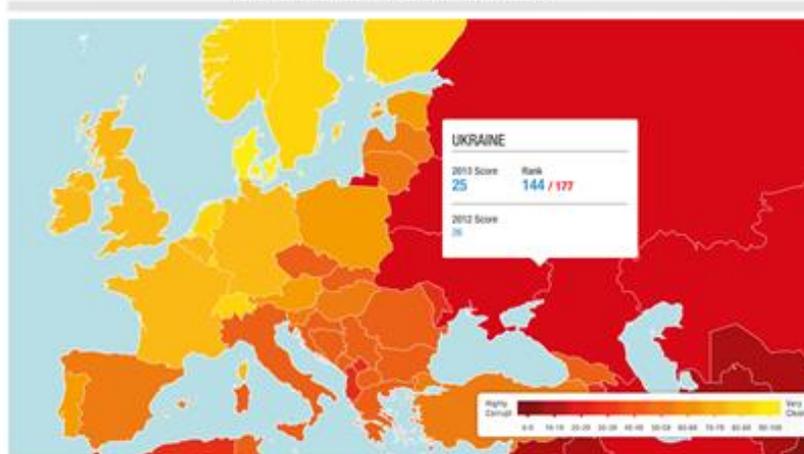
From the website of Sakha Today (Yakutia) <http://sakha.today/society/rotary/>

Challenges: Corruption



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CORRUPTION PERCEPTIONS INDEX 2013



Corruption Issues are being reduced with the help of Open World

Looking Forward to 2016



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Date	Country	Placement City	Subtheme
3-Mar	RUSSIA	McAllen, LA	Women Entrepreneurs (Novosibirsk)
3-Mar	RUSSIA	Elko, NV	Women Entrepreneurs (Kamchatka)
20-Apr	UKRAINE	Wooster, OH	Agriculture - New Technologies (Cherkassy)
20-Apr	UKRAINE	Branchville, NJ	Managing Ag. Entrepreneurs (Tshukavda)
20-Apr	UKRAINE	Alexandria, VA	Specialized Rule of Law
2-Jun	RUSSIA	Winfield, KS	Environment (Novosibirsk)
29-Sep	GEORGIA	Lincoln, NE	Social Inclusion
26-Oct	RUSSIA	Montclair, NJ	U.S.-Russia Partnerships (Cherapovo/Shtokan)
26-Oct	RUSSIA	White Bear Lake, MN	U.S.-Russia Partnerships (Gaznaysk-Brisol)
9-Nov	AZERBAIJAN	Oklahoma City, OK	Bar Association/Civil Rights Advocates

Upcoming Programs:

1. Accountable Governance Delegation from Serbia -- January 25, 2016

Columbus, OH: Members of Parliament

Serbia

Accountable Governance – Role of Legislatures: Programming for the legislator delegations allows the delegates to meet with their American counterparts; attend committee meetings and legislative sessions; and learn how their counterparts interact with relevant executive agencies, advocacy groups, and constituents. Programming for the “mixed” delegations of legislators, legislative staff, and legislative administrators focuses on the operations of a legislature, on how legislatures receive independent information and analysis to support decision-making, and on constituent services.

2. Accountable Governments Delegations from Georgia, Kyrgyzstan and Ukraine -- February 18, 2016

Atlanta, GA: Georgia: Role of Local Legislature and Staff

Phoenix, AZ: Kyrgyzstan: Role of Local Legislature and Staff

Orem, UT: Ukraine: Legislature and Staff Development

Santa Fe, NM: Ukraine: Legislature and Staff Development

Little Rock, AR: Ukraine: Legislature Development and Anti-Corruption

Georgia, Kyrgyzstan, Ukraine

Accountable Governance – Role of Legislatures: Programming for the legislator delegations allows the delegates to meet with their American counterparts; attend committee meetings and legislative sessions;

and learn how their counterparts interact with relevant executive agencies, advocacy groups, and constituents. Programming for the “mixed” delegations of legislators, legislative staff, and legislative administrators focuses on the operations of a legislature, on how legislatures receive independent information and analysis to support decision-making, and on constituent services.

3. Accountable Governance Delegation from Mongolia -- February 24, 2016

Honolulu, HI: Mongolia: Members of Parliament

Mongolia

Accountable Governance – Role of Legislatures: Programming for the legislator delegations allows the delegates to meet with their American counterparts; attend committee meetings and legislative sessions; and learn how their counterparts interact with relevant executive agencies, advocacy groups, and constituents. Programming for the “mixed” delegations of legislators, legislative staff, and legislative administrators focuses on the operations of a legislature, on how legislatures receive independent information and analysis to support decision-making, and on constituent services.

4. Accountable Governance Delegations from Ukraine -- February 24, 2016

Cheyenne, WY: Ukraine: Role of Legislature and Center-Periphery Relations

Lincoln, NE: Ukraine: Legislature Development and Health

Richmond, VA: Ukraine: Legislature Development and Education

Ukraine

Accountable Governance – Role of Legislatures: Programming for the legislator delegations allows the delegates to meet with their American counterparts; attend committee meetings and legislative sessions; and learn how their counterparts interact with relevant executive agencies, advocacy groups, and constituents. Programming for the “mixed” delegations of legislators, legislative staff, and legislative administrators focuses on the operations of a legislature, on how legislatures receive independent information and analysis to support decision-making, and on constituent services.

5. Accountable Governance Delegations from Russia and Tajikistan -- March 3, 2016

Oak Ridge, TN: Russia: Young Professionals and Women Entrepreneurs

Dubuque, IA: Russia: Young Professionals and Women Entrepreneurs

Elko, NV: Russia: Young Professionals and Women Entrepreneurs

Metairie, LA: Russia: Entrepreneurs (Novosibirsk)

Dobbs Ferry, NY: Tajikistan: Young Professionals and Women Entrepreneurs

Accountable Governance: Local programs on accountable governance emphasize the legislative process, administrative capacity-building, transparency, service delivery, financing of government services, media relations, community development, and environmental management.

[Ed. Note: More Upcoming Programs may be found on the Open World Website, openworld@openworld.gov]

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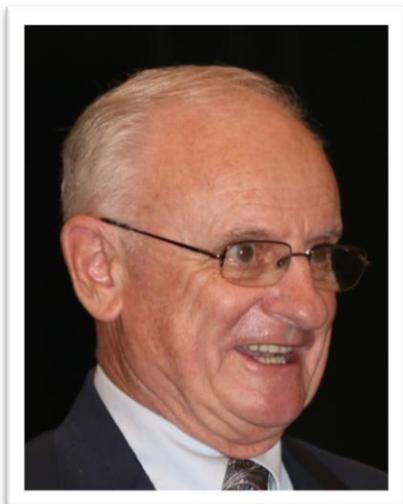
Fax: (202) 252-3464

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Plenary Session III: Evaluating the New Grants Model & the Role of the Cadre



PDG Ron Goodsite introduced Past RI Director Phil Silvers, D5500 Governor in 1999-2000 and RI Director 2008-2010, serving the Rocky Mountains and Plains States.

Professionally, Phil has done program evaluation research for more than forty years.

He founded two Rotary clubs in the Russian Far East, the first minority-majority club in Arizona, and he was instrumental in starting the Rotary Club of Ramallah in the Palestinian West Bank where there are now four thriving Rotary Clubs.

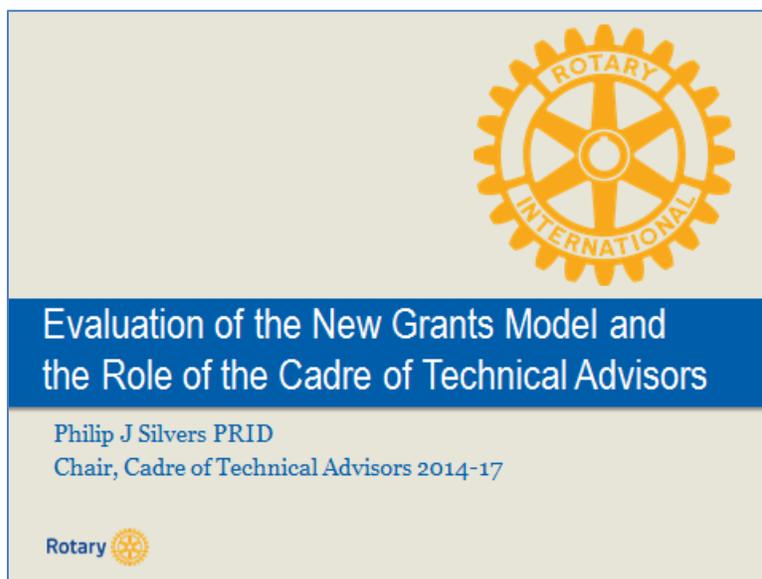
Phil is the author of six Global Grants, has led three Vocational Training Teams and has consulted on or evaluated another twenty-five Global Grants.

He currently coordinates the M & E (the evaluation design) for Rotary Health Days in four African countries and now in India. The design has been endorsed by the Centers for Disease Control (CDC), The Rotary Foundation (TRF) and the Coca Cola Africa Foundation.

Phil also chairs the Cadre of Technical Advisors, a small committee of 500 Rotarians. He will speak to us about the Cadre's role in the worldwide evaluation of the New Grants Model.



PDG Ron Goodsite



The New Grants Model: Opportunities and Challenges

- Larger, more significant and more sustainable grants
- 24% increase from 2014 to 2015 (\$68.7M)
- Growing strengths in Areas of Focus
 - Expertise
 - Support materials
- Sponsors struggling with—
 - Community Assessments
 - Sustainability
 - Monitoring and Evaluation (M&E) Design and Implementation
- Ever-increasing need for Cadre support



#ricon15

2014-15 TRF Grants

- District Grants 487 for \$25.2M
- Global Grants 1,078 for \$68.7M
 - DPT 329 for \$19.8M
 - WAS 302 for \$20.0M
 - ECD 168 for \$8M
 - MCH 78 for \$5.7M
 - P&C 68 for \$4.0

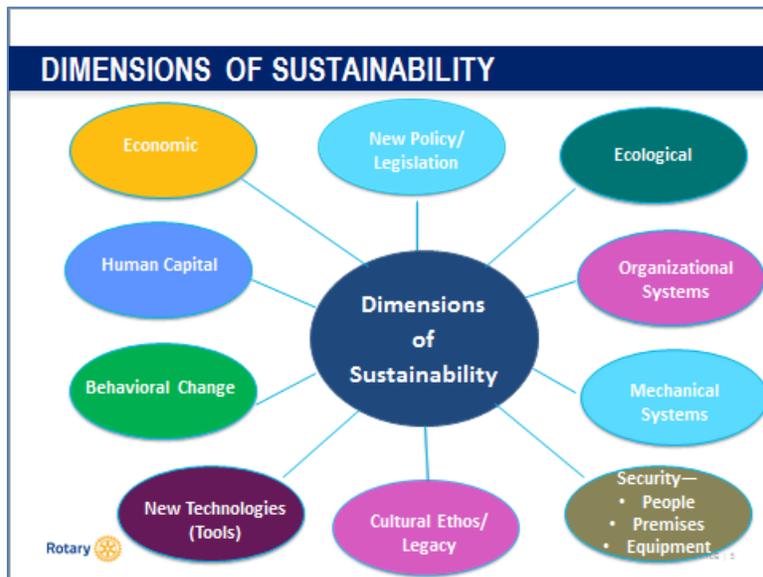


#ricon15

- Disease Prevention and Treatment (**DPT**)
- Providing clean water and sanitation (Water & Sanitation Projects -- **WAS**)
- Growing local economies (Economic & Community Development -- **ECD**)
- Saving mothers and children (Maternal & Child Health --**MCH**)
- Promoting peace and conflict resolution (**P&C**)



In Matching Grants and GSE, we have programmed ourselves to the Externalities and Process Results. Creating sustainable change is the real challenge under the new grants model.



Economic viability is always an issue. If equipment is involved, security and maintenance are required.

Experience in One District



Dr Art Quinn
Former District 5950
TRF Grants Chair



- Annual Giving:
 - \$200-300 per capita
- Under Matching Grants
 - 18-25 MGs/year funded
- New Grants Model, 2013-14
 - Submitted: 11 Global Grants
 - Funded: 4
 - Reason: inadequate sustainability to meet the advanced standards

“It makes me wonder how sustainable our prior years’ MGs really were” #ricon15

Art Quinn’s observations are comparable to the findings from the TRF Project Enhancement Process (PEP) 2012-15 in 17 communities around the world.

Community Assessment—Critical to Sustainability

- Sustainability is now a universal requirement of grant funding—foundations, corporate, government, UN
- Sustainability begins with Needs Assessment, a potential Achilles’ heel of TRF grant applicants
- Old Model: Outside expert looking in on a village
- New Model: Getting to see the world as the beneficiaries see the world.
- Rtn Eugene, successful in 17 years of Matching Grants: “But they don’t know what they don’t know.”



#ricon15

BUT, Phil said to Rotarian Eugene: “You don’t know what You don’t know!!”

Community Assessment: Need to Go Beyond the Obvious

- Better proposals cite MOH, WHO, Unicef statistics— to show needs
- These help, but they are not enough—need to see the world as your intended beneficiaries do
- Yes, there are obvious needs, **but what else is going on?**
 - Examples—Toilets in an Indian tribal village
 - Rotary Wheel School in West Africa
 - Water bore hole in Africa
 - WASH project in Nairobi slum



#ricon15

Quality Assurance in Rotary Foundation Programs



There are several aspects to TRF's Quality Assurance efforts.

Grant Application and Screening, under Victor Barnes and Finance, screens all applications to make sure that they are complete and meet all qualifying criteria.

Stewardship, under Meredith Burlew, assures that sponsor clubs and districts are qualified and—at every step in the process—TRF donor monies are spent for the precise purposes intended by the Trustees, and without misdirection or waste.

Programmatic quality, under James Robinson with support from TRF data systems, uses the science of evaluation research to assess the effectiveness and the efficiency of individual projects and all TRF programs.

The Cadre of Technical Advisors has the unique TRF role of supporting **all three** Quality Assurance functions. Currently, we need to more extensively promote the Cadre's support in the grant application/screening process. It can increase the efficiency of the application process and the effectiveness of the resulting projects.

All of these purposes directly support TRF’s 4-Star Charity Navigator rating—1) good governance and ethical best practices, 2) provides donors with critical information about the organization

Role of the Cadre of Technical Advisors

- Provide Assistance to Clubs and Districts
 - General education about Global Grants
 - Assistance in applying for specific grants
- Conduct Trustee-mandated desk reviews and on-site monitoring visits of Global Grant projects
- Conduct targeted and random audits of clubs and districts
- Evaluate TRF programs
 - Grants Model Evaluation
 - Peace Centers

Rotary  TITLE | 10

Cadre Site Visit Activity

	<u>2013</u>	<u>2014</u>	<u>2015</u>
• Advisors	412	394	550
• Site Visits	86	109	102
• Av Cost	\$1454	\$1295	\$1279

Rotary  TITLE | 11

Grants Model Evaluation—the Process

- Focus: the New Grants Model—not the individual projects
- Overseen by the Trustees' Program Committee; implemented by the Cadre and TRF staff
- ~100 site visits; 86=Sustainability, rest=AOF, VTTs, and Beneficiary evaluation
- Focus groups/Interviews
- Surveys
- At the same time, building an evaluation model for the future



TITLE | 12

STATUS OF EVALUATION

Evaluation Component	Status
Cadre Site visits (100 geographically representative sites—5% of grant activity)	74 Cadre site visits for sustainability check complete 20 area of focus Cadre site visits complete
Cadre Operational Audits (10 districts)	10 Operational audits complete
Focus groups/interviews	Focus groups and interviews completed at 11 Rotary Institutes
Surveys	5 surveys complete
Technology research	3 focus groups conducted at Institutes with user feedback and Programs Committee interviews
Marketplace and data analysis	Interviews being conducted in January 2016 by GfK



TITLE | 13

There are six parts to the evaluation:

- Cadre site visits
- Operational audits
- Focus groups and interviews
- Surveys
- Technology research

KEY THEMES OF THE EVALUATION

- Sustainability
- Areas of Focus
- Specific programmatic concerns – Humanitarian/VTT/Scholarship
- Impact
- Critical Success Factor Validation
- Rotarian satisfaction
- Change management and training



TITLE | 14

In October 2014, the Programs Committee began considering the scope of the grant model evaluation in preparation for it to start in July 2016. These seven themes were identified for investigation as part of the evaluation. They are in no particular order.

Grants Management Evaluation Surveys

- Grants Participants [yearly since pilot] (2000)
- Sponsors of Declined Grants (90)
- Targeted—those who seemed to have walked away (2456)
- Scholarships (188)
- VTT (216)
- Staff (40)



TITLE | 15

Phil's Findings—Purely Anecdotal

- We are still in the Matching Grants mode—we use ‘wallpaper’ verbiage to address Community Assessment, M&E, & Sustainability w/o substance
- Some clubs and districts ‘hitting the wall’ with GGs
 - Plummeting number of grants; build-up of DDF
 - Frustration or anger or refusing to donate to APF
 - RGOs, Cadre can turn things around; message does not filter down, e.g., RRFC in Sao Paulo convention
- Attribution/Credit: Rotary gets short-end of the stick, if any at all.



TITLE | 16

How You Can Help

- **Spread the word:** Cadre can help in grant applications—right from the start when you have an idea; also, the RAGs can help
 - Avoid applicant frustration; save TRF staff time
 - Strengthen the quality and effectiveness of grants
- **Recruit** Cadre members in western Pacific, Central America, and Africa
- **Promote** the Cadre at Institutes and District meetings. You want a good speaker?
- **Dialog** with us today—it can help strengthen

Rotary  our operations

TITLE | 17

Questions, Comments, Advice?

- Thank you for your support!



TITLE | 18

How the Cadre Can Help Improve Global Grant Applications

Cadre members can use and share this advice with other Rotarians when:

- Planning global grants with your own clubs
- Assisting Rotarians in your district in planning sustainable, high-quality global grants when possible
- Discussing successes and lessons-learned with Rotarians while on site visits



TITLE | 19

ADVISING ROTARIANS ON GLOBAL GRANT PLANNING

A Key Responsibility of Rotary Cadre Technical Advisers

Educating Rotarians about Foundation procedures and supporting their initiatives to design, implement, and manage grant projects

In what ways can cadre members support this responsibility?

- Offer trainings on global grant planning
- Assist Rotarians with grant-planning and best-practices for implementation
- Keep in touch with projectsponsors after you review their project to offer assistance and encouragement down the road
- Make presentations at District conferences
- Send articles to the District Governor's news letter



TITLE | 20

Kaiyaba Primary School Borehole Water Project

Community Needs Assessment – use of the right tools

- Interviews / focus groups / community meetings
- Surveys
- Asset Inventory
- Community mapping



TITLE | 21

The International Partners had identified the provision of bore hole to meet the school's water needs. After holding group meetings with School Board of Management, it turned out that the maintenance and running expenses of a bore hole was out of reach for the school. Besides, the school had two rainwater harvesting tanks and for the time being they were serving the school well.

****It is important that we help each other to plan high-quality projects.** The first step in planning high-quality, sustainable project is conducting a community assessment.

Raise your hand if you can advise on how to do the following community assessments:

- Interviews/focus groups/community meetings (who in here can guide a club in conducting this?)
- Surveys?
- Asset Inventory?
- Community mapping?



How the Cadre Can Help Improve Global Grant Applications

Cadre members can use and share this advice with other Rotarians when:

- Planning global grants with your own clubs
- Assisting Rotarians in your district in planning sustainable, high-quality global grants when possible
- Discussing successes and lessons-learned with Rotarians while on site visits

Rotary  TITLE | 22



The Importance of Community Assessments

Rotary  TITLE | 23

In my club we were given land by one of the members and in order to protect it from land grabbers we planted trees and this was aimed at also helping in the environment preservation but community members

used to graze animals and they ended up destroying the mini forest we were trying to put up – locally generated.

- What we did wrong: we did not involve the community in planning the project
- We undertook the project without community participation

Cow project: In RC of Kenya we had a grant that was code named “Cow project” it was aimed at economically empowering widows to be able to fend for their children.

- Widows were identified in the villages and 50% Friesian cows were given to them.
- The club constructed the shelter, saw to the provision of vet services, ensured that the widows are trained on how to care for the cows.

BUT

- The community was not considered as a major player to support the widows: 2 cows were stolen.
- Vet services were not easily available and 2 cows failed to get fertilization and 1 cow died.

What we did wrong:

- We never assessed the availability of a veterinary doctor nearby, so the project failed because of lack of access to vet services
- The Friesian cows are very expensive to maintain and in our assessment we assumed that they only needed shelters and we knew that a cow-in-calf would be manageable given that it was already milking but the project suited the **able** poor, **not** the **very needy** poor
- We never consulted the beneficiary on their ability to manage the cows. There was one where we had to withdraw the cow and we gave her poultry, which she managed very well

Why are Community Assessments Important?

- The community assessment informs the further services required for a successful project.
- You may conceptualize a project but there can be so many other factors that will impact on the project's success.
- Assessment helps one plan how to work with the community

Rotary  TITLE | 24

Add a photo of the story you have to tell if you have a photo (although try not to mention names or any details that might embarrass the sponsoring club).

A story works especially well if it happened to you or your club, and can be a lesson-learned personally about the value of community assessments!

Why are Community Assessments Important?

- Community members know their community better than outsiders know it
- Community assessments help Rotarians meet and establish relationships with community members
- Community assessments get community members involved from the beginning, which sets the stage for their participation throughout the project
- If projects do not come from the community, they are not likely to be sustained by the community

Ask the audience for their ideas: Why are community assessments important?

Do your best to connect each point to your story or to other stories you may have.

Feel free to rearrange the points, or add to them, to align with your story (you can use animation as well so the points appear in the order you speak to them).

Why are Community Assessments Important?

- Community assessments provide evidence of the need for a project. Without that evidence, the project is not considered data-driven.
- Rotarians will have a better chance at raising funds and contributing to the reputation of Rotary as a responsible, data-driven organization by conducting a community assessment.

Why are Community Assessments Important?



Rotary 

TITLE | 27

Lyantonde 3H grant

Community assessments:

- We assessed the gaps in HIV prevention why the prevalence remained so high with a high incidence rate. We met with the district officials to discuss the drivers as well as with the community. There were meetings in the community and a mini baseline survey
- We discussed with the community on what could be done to reduce the risk.

3H grant in Lyantonde: the microfinancing is still going on, even though the project ended in 2010.

End by asking participants how they can respond when Rotarians suggest that their project does not need a community assessment (make sure to limit responses to 1 or 2 depending on how much time you have or to simply encourage participants to reflect on the question if you do not have time left).

My Experience

- 44 years as a survey research and program evaluation professional (in 5 of the AOFs)
- Taught graduate research methods at the ASU School of Social Work for 10 years
- Asst Dir., Arizona Center for Educational Evaluation and Measurement for 2 years
- Global Grants:
 - Worked with 20+ projects in 12 countries on six continents.
 - Authored five GGs—VTTs and “Combos”
 - Did two GME site visits for the Cadre
 - Tapped my network of Cadre members

Rotary 

TITLE | 28

Meeting with PDG Verinder Sur, DRFC D-9212

D-9212: Eritrea, Ethiopia,
Kenya, South Sudan



Rotary 

- In 2013-14, 85 Global Grants authorized
- Typical Scenario: Int'l Rotary sponsor and local NGO partnership
- Then they go looking for a local RC to be the host club
- His challenge: to make sure that the local club—
 - Understands its responsibilities
 - Has meaningful involvement
 - \$100 min buy-in required
 - Professional annual audit required

11/16/14