

# Tech Talk



Newsletter of The Rotary Foundation Cadre of Technical Advisers • May 2011

## 2010-11 Technical Coordinators

### CADRE CHAIR & VICE CHAIR

David Morgan (Wales)  
Michael Webb (England)

### AGRICULTURE & FOOD PRODUCTION

Dr. Cecilia Reyes (Philippines)  
Camilo Calvo (USA)  
Carlos A. Esquerro (Argentina)

### EDUCATION & LITERACY

Sylvia Byers (Australia)  
Madhumita Bishnu (India)  
Dr. John Thorne (Australia)

### FINANCIAL AUDITORS

Abu Mohsin (Pakistan)  
Michael Lirio (Philippines)  
Carlos Peralta (Argentina)

### HEALTH

Dr. Stanley D. Fike (Canada)  
Dr. Josephine Wong (Taiwan)  
Dr. Donald Kaminsky (Honduras)

### LOW-COST SHELTERS

Turgut Gökyigit (Turkey)  
Michael Barrington (USA)  
Rohan Fernando (Sri Lanka)

### SMALL BUSINESS & REVOLVING LOANS

Amégnizi Maurice Edoth (Togo)  
Elio Cerini (Italy)  
Beverly Radue (South Africa)

### WATER, SANITATION & ENVIRONMENT

Kurt Bay (Switzerland)  
Joel Nagel (USA)  
Korhan Atilla (Turkey)

## Farewell Message from the Chair

David Morgan

As we approach the end of another Rotary year, in which the first — and very successful — recruitment meeting was held in Kampala, Uganda, it is gratifying to observe the continuing success of technical adviser stewardship activity, and the resulting financial benefits to The Rotary Foundation. Of course, this is primarily attributable to the expertise of members and the professionalism of staff, but training has also played a part.

Prior to 2008, one-third of our technical coordinators met annually in Evanston. But in 2007, a need for the training of technical advisers — the cadre members who often must make difficult on-site decisions — was identified. Training has since evolved from a one-hour coffee meeting held during annual conventions to today's full-day seminars, in which the ideas and experiences of members are shared and consistency in report writing is developed.

But there are more challenges to overcome, more new techniques and policies to be embraced, and more progress to be made as we all work to produce as seamless a transition as possible to the new grant structure under the Future Vision Plan.

However, I have no doubt that with the team we now have in place, coupled with successful recruitment in the areas of need, the Trustees will be well served in the next few demanding

years when it comes to the stewardship of grant money.

But we must never be afraid of change. Despite the strength of our current team, there will be a continuing need to seek out qualified Rotarians to join the cadre, especially those conversant with modern techniques and practices.

At the end of this Rotary year, both Heather Fosburgh, who has played such a pivotal role in the advancement of our training, and I will be leaving our present roles. We hope this will provide an opportunity for new ideas and procedures to be introduced. Heather has reluctantly decided to leave Rotary in order to take up a public health-related career, which she's long dreamt of doing and can now achieve via the Master of Public Health program at Yale University in Connecticut, USA.

Continuity, of course, will be ensured through Christian Pepera's continued service in his helpful role in Evanston, and the clearly demonstrated technical and interpersonal skills of my successor, cadre Vice Chair Mike Webb. Please give both Heather's successor and Mike the same unqualified support you have given us.

In conclusion, I want to thank you all for your courtesies, support, and friendship, and I wish you continuing success.

Regards,  
David

## In Our Own Words

# Community Rebuild

Ronald Pickford, Rotary Club of Ballarat, Victoria, Australia



A low-cost shelter project incorporated rain water harvesting.

“I am so happy now that I live each day without fear.” These are the translated words of a beneficiary of a low-cost shelter project in the Philippines. She told us that when she lived in flimsy squatter housing, she’d been afraid of not having food and water and had feared for her safety. “I have so many friends all living in a safe, friendly village with food and water,” she said.

My recent assignment to the Philippines proved a challenging venture: Days after I left an area held by rebels, the detonation of an explosive device killed several people. Later, a second assignment took me to Fiji.

It is a privilege to be able to report on the difference a low-cost shelter can make in the lives of people. They are able to move out of cities with squatter housing not fit for families and into new, sustainable communities.

The shelter projects have been undertaken in response to the repeated destruction of homes by cyclones. Newly built, cyclone-resistant housing improves the quality of life for disadvantaged families and provides them an opportunity to break free from the poverty cycle.

I have come to understand how important the low-cost shelter projects are in building strong and resilient communities and providing for people’s basic needs: clean water, sanitation, security, empowerment, dignity, independence, and pride. It was my joy to learn how families, empowered to acquire new life skills, develop small-scale home businesses such as orchid planting and the sewing of garments to be sold in local markets.

I was able to make a purchase at a community-established cooperative

**“I now have a strong belief in what can be achieved in the long term through well-managed projects guided by a clear vision.”**

where families can buy basic food and personal-hygiene items. And I met a family that had participated in family care and training, education support, and income-generating programs and had then been able to move on to an even better life beyond the low-cost shelter community.

I was most interested in the cultural values that denigrate women and children, and in living arrangements in which large, extended families crowd together, which leads to health problems, violence, and greater poverty. To address these problems, well-structured social development programs aim to build cohesive communities where all members share in decision making. This helps to nurture trust and facilitate conflict resolution in a violence-free environment, helping to build a unified community that can free the next generation from poverty.

Having witnessed, audited, and assessed both of these projects, I now have a strong belief in what can be achieved in the long term through well-managed projects guided by a clear vision. There is strong value in funding these grant programs, not only because they provide safe, low-cost shelters but also because the community development activities deliver less-tangible benefits.

Both the technical and social aspects of these two projects were well implemented and worthy of support. The projects effectively addressed several basic needs of impoverished families and demonstrated an efficient use of money and time.

### 2011-12 TRF Cadre Training

Though many cadre members are not back from New Orleans, Louisiana, USA, yet, it is not too early to plan for upcoming cadre trainings.

TENTATIVE  
**Accra, Ghana**  
*Recruitment Focus*  
19 August 2011

SCHEDULED  
**Bangkok, Thailand**  
*Training Focus*  
Before the RI Convention  
6-9 May 2012



The Rotary Foundation Cadre of Technical Advisers

**YEAR IN REVIEW**

The 2010-11 Rotary year has proved to be very exciting and productive for the cadre.

Membership has grown 16 percent since this time last year, to 326 registered advisers in 48 countries. Cadre members have completed 134 assignments, including 113 site visits in 40 countries on six continents. The projects evaluated by the cadre have received a total of US\$10 million in awards from The Rotary Foundation and \$19 million in total project funding.

With the launch of the Future Vision pilot, the cadre began evaluating Rotary Foundation Global Grant applications, for projects that relate to the areas of focus and emphasize sustainability and measurability. So far, the cadre has completed 15 technical reviews and one advance site visit of global grant projects, playing a key role in the funding decisions that will affect the pilot's outcome.

The Future Vision pilot is expected to expand opportunities for cadre members whose skills are currently underutilized. For example, lawyers, mediators, and social workers will be able to evaluate projects within the new peace and conflict prevention/resolution area of focus, and the cadre's many small-business experts will have new opportunities in the economic and community development area.

Though cadre membership has grown, persistent geographic disparities and underrepresentation of certain groups create challenges. For example, 40 percent of cadre assignments in 2010-11 have been in Africa — where only 21 cadre members live. This has meant higher airfare costs and longer travel times, as cadre members from Europe,

North America, and South Asia are called on to complete many of the assignments in Africa.

The need for more African members inspired the recruitment seminar in Kampala, Uganda, in September. It was a great success, drawing more than 50 attendees. Nine of them became registered cadre members after the meeting — nearly doubling the African membership.

**Recruitment needs**

- Portuguese speakers
- French speakers
- Spanish speakers
- Water and sanitation professionals
- Health professionals
- Women
- Residents of South America and Africa

The Stewardship Department continues to address the cadre's recruitment needs, but we can use your help. If you know of any Rotarians who can contribute to the Foundation by serving as cadre members, please encourage them to volunteer. As cadre chair David Morgan says, the next few years will be demanding as we work to transition to the new grant structure under the Future Vision Plan. Adding to our ranks will help position the cadre to undertake future challenges.

We thank you for your commitment to the Foundation and look forward to another successful year.

**2010-11 Cadre Visits**



Marilyn Farber visited an education project in Kenya.



Cecelia Babkirk visited a project providing revolving loans to women in Honduras.



Hector Martin evaluated a water and community development project in Guatemala.



Alfredo Nocero audited a water and health project in Benin.



Kurt Bay evaluated a potential water and sanitation project in Ethiopia.

## Stewardship Staff

**Heather Fosburgh**  
Manager

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Open

Auditing and Monitoring Specialist

**Rajesh Anand**

Auditing and Monitoring Coordinator,

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## Did you know?

- ✓ TRF has funded well over 225 microcredit projects, totaling over US\$5.5 million in TRF awards.
- ✓ All microcredit projects receive a technical review from a cadre member.



Tissa Bandaranayake visited a microcredit project in India where women completed a sewing course.

# Microcredit and Future Vision

Cadre members may be asked to conduct technical reviews, site visits, and audits for global grant projects with microcredit components. To support these efforts, we would like to share TRF's project requirements under the Future Vision pilot, as these differ substantively from current revolving loan requirements for traditional programs like Matching Grants and 3-H grants.

The Trustees decided in October to modify the requirements for microcredit projects funded through the pilot for a variety of reasons, including:

- Existing program requirements, applications, and report forms were difficult to understand and use.
- Some requirements were overly burdensome for sponsor clubs and districts, including a signed agreement with each credit group during the application stage, and reporting by the individual borrower during the reporting stage.

TRF's encouragement of clubs and districts to develop stand-alone revolving loan fund projects without the involvement of an established microfinance institution (MFI) did not support the growth of permanent lending infrastructures.

To address these points, the Trustees approved the following modifications to be tested by Future Vision pilot clubs and districts:

- Allowing reporting by credit group instead of individual borrower
- Encouraging Rotarians to partner with reputable and established MFIs to implement projects while remaining actively involved and overseeing/monitoring the use of grant funds
- Replacing individual credit group agreements with a memorandum of understanding with the partner MFI

- Requiring a multidimensional project design that includes training or another complementary component in addition to loan capital.

Two sets of requirements will be operating simultaneously throughout the Future Vision pilot period: the traditional set for Matching Grant projects, and the revised set for global grants awarded to pilot clubs and districts. Revised [application](#) and [report](#) supplements reflecting the modified requirements are available on the RI website for Rotarians representing pilot clubs and districts. Cadre members asked to conduct technical reviews for microcredit projects in pilot districts will use a new tech review form that also reflects the modifications.

TRF anticipates the following benefits from the new requirements:

- Improved quality of the microcredit projects it funds
- Sustainability, achieved through its support of existing lending infrastructure
- Simplified project management for Rotary sponsors and streamlined administration for TRF

Near the end of the pilot, TRF will collect feedback from Rotarians about the revised requirements and forms so it can make improvements before the worldwide Future Vision launch in 2013-14.

A total of 100 Rotary districts are participating in the three-year Future Vision pilot, during which The Rotary Foundation (TRF) will award global grants related to the areas of focus. In the economic and community development area, TRF can consider new ways to support microcredit projects.

Please send comments or questions about TRF support of microcredit projects during the Future Vision pilot to Candace Embling, Area of Focus Manager, Economic and Community Development.

[candace.embling@rotary.org](mailto:candace.embling@rotary.org).