

CHECKLIST FOR PLANNING AND ORGANISING A ROTARY INTERNATIONAL VISIT OR PROJECT

Know where you are at all times in the planning stage – DK Mair, Rotary Hutt City

ASSESS, IDENTIFY, ANALYZE, DECIDE, PLAN, ACT, MONITOR, EVALUATE & REPORT

Defining the project	Consult your District International Services Committee and Stuart Batty at RNZWCS	Discuss your project idea and location with your District 9940 International Services Committee and Stuart Batty, Executive Director, RNZWCS Ltd He has the contact details for every Rotary club worldwide. Ph./Fax 64 3 3599218, Mb: 027 2695615, stuart.batty@rnzwcs.org
	Select a Rotary club to communicate with to start the process	Email or call this Rotary club. Establish a rapport & build a relationship. Ask them about current & past projects. Ask for detailed reports so you can review
	Host Rotary club	ASK - can they confirm their accounts are audited? Transparency in process must be the first step. Check certificate of qualification?
	Review data sent from Host Rotary club	Do an analysis of all data received to identify & define the critical needs. Remember it is better to pick one focus area to be successful with.
	Approach aid agencies operating in that country	Establish a rapport & build a relationship. Ask them about current & past projects. Ask for detailed reports so you can review & analyse data & statistics. Evaluate partnership options
	Consider when you want the visit/project to start	Please remember that issues arise at changeover, so it is best NOT to push into a visit/project until October when the District Grants etc. have been paid and the new board members are all bedded in.
	Considerations for the visit and/or project	Plan & schedule the entire trip PR and Media in NZ and in the foreign country Identify and contact partners – set up Meetings and visit successful projects Plan meetings with Host Rotary club. Attend their weekly meetings Get buy-in for needs assessment (see below) Review current data and its sources Communicate with hosts and partners Establish budget and project plan - area of focus See and confirm audited accounts – Transparency Determine who will be involved Determine desired performance Conduct a SWOT analysis of each potential project Identify potential team roles and/or implementation team Match Rotary strategic plan to community's needs Confirm budgets, prepare documents & applications to Rotary

Completing a Needs Assessment	Needs Assessment within a Performance Improvement Framework	<p>Identify needs as gaps between current and desired results.</p> <p>Analyze needs and potential solutions.</p> <p>Decide which course of action will best achieve desired results.</p> <p>PLAN • analyze design</p> <p>ACT • develop & implement</p> <p>MONITOR • measure • learn • improve</p> <p>EVALUATE • measure • report • use</p> <p>Improving performance, as we use the term, is the move from achieving current results to accomplishing desired results. Thus, rather than asking people what they “need,” needs assessments more importantly define gaps in results and highlight opportunities to improve performance.</p> <p>A useful needs assessment will accomplish the following:</p> <ul style="list-style-type: none"> • Focus on results first, solutions second. • Define needs as gaps in results. • Align operational, tactical, and strategic performance. • Systematically analyze needs to inform decisions. • Consider a broad array of possible activities. • Compare activities against performance criteria. • Provide information that justifies the decision before it is made.
	How Do You Determine the Scope of Your Needs Assessment?	<p>We can break down decisions into three levels:</p> <ul style="list-style-type: none"> • Strategic (typically involves goals, objectives, and strategic policies defining the relationship between organizations and the society they serve) • Tactical (includes the policies and procedures put in place to both support strategic decisions and guide operational decisions, thereby defining the goals and objectives of an organization or institution) • Operational (includes all sorts of short and long-term decisions that typically involve implementing projects or programs and carrying out tasks to produce results).
	Timelines	<p>Plan & schedule meetings & project visits</p> <p>Work out the time to effect & complete specific parts to your visit/project. Break it down into weekly slots</p>

		<p>and create small specific smart goals that will allow you to focus on the small steps to achieve the bigger goal. Include pre deployment goals.</p> <p>Add contingencies for freight/supplies not arriving on time, team members being sick, natural disasters, flight delays. The list is endless.</p> <p>Allow 1-2 days to problem solve any arising issues</p>
Budgets, Fundraising and PR	Consider budget and scope of visit and/or project funding options	<p>What Club funds can be used towards the project?</p> <p>District Grant applications close 31 May; matched funding, local and international projects.</p> <p>Note: Your club must qualify to receive a District grant by attending the District Assembly Grant workshop in the year your application is submitted.</p> <p>Global Grants can be applied year-round; project budget must be min. of US\$30,000 and partnered by at least one overseas Rotary club or district.</p>
	Fundraise because we do underestimate the cost	<p>Get club members, other District clubs and or business associates to help with this. Run a fundraising event that's fun & get the media involved to promote Rotary positively. Encourage fundraising for medical equipment, educational supplies, food & clothing so that these can be purchased in the country to boost their economy.</p>
	Promote trip with good PR	<p>Include all members, local papers, social media and through Rotary newsletters & magazines</p>
Travel, Insurance, Medical and Accommodation	Passports and Visas	<p>Check passport expiry requirements and what visas will be required for the countries you will be visiting.</p>
	Contact airlines for best rates	<p>Book flights early to ensure cheapest option. Some major airlines offer missionary fares, these have additional baggage & flexible change options</p>
	Rotary Insurance through RNZWCS	<p>All Rotarian volunteers need to take out adequate Travel Insurance once they book their overseas fare. Travel policies generally exclude all cover arising out of work, either paid or as a volunteer. Arranging your insurance through RNZWCS is strongly recommended as the RNZWCS Ltd travel policy has that exclusion removed. Check out http://www.rnzwcs.org/forvolunteers/</p>
	Pre travel medical checks	<p>If you're visiting a developing country take your own medicines & first aid kits. Your GP will help you to consider what vaccinations and medications are required. Many countries require an inoculation "yellow" card to be presented at the border (it is a must, particularly with African countries). Also check http://www.traveldoctor.co.nz/</p>
	Ask host Rotary club re: accommodation	<p>Book safe accommodation based on your budget</p>
	Notify RNZWCS, MFAT & Safetravel	<p>Once you have flights, passport, visas, accommodation & a schedule for your project notify these</p>

		agencies. Register all travelling persons & contact telephone at www.safetravel.govt.nz
Freight and Customs	Contact freight organizations and get quotes for approx. weights	Start the process early to ensure you have an approx. cost of freight for e.g. 50kg, 100kg and 2 tons etc. If you have the money buy the supplies on-ground in the foreign country, it's easier and recommended by MFAT.
	Packaging of donated goods	Approach local business for free packaging. You'll need sturdy boxes, tape, labels or add to budget
	Supplies leaving NZ under Aid category must be Customs registered	Contact Stuart Batty to request the RNZWCS customs code.
	Aid / Donation supporting Documents	All documents concerning gifted foreign aid from NZ have to be authenticated through MFAT. You will need to notify MFAT & RNZWCS that you are transporting aid into another country. The letters confirming donations must be seen by a notary, checked off by Internal Affairs then authenticated by MFAT. This is a 3-part process. You need to ensure you have enough time to do this or your shipment/freight will not be recognized as Aid and there will be duty to pay and some 8 weeks to wait for clearance. Click here for info: http://www.mfat.govt.nz/About-the-Ministry/What-we-do/0-authentication-of-documents.php
	Customs	Customs in a 1/3 world or developing country is a total nightmare. If you have freight to be cleared, ensure that you have an official Rotary rubber stamp and inkpad with you to stamp official documents on receiving/releasing your freight/aid. You will have to prove the supplies are gifted with letters certifying a nil cost. Take all original letters with you as additional proof. Check whether the country you are visiting has a Tax Exempt Certificate. Apply for this early before you leave. If you do not have one then expect to pay taxes for importing supplies. It is imperative, that you have good people on the ground that can assist customs clearance. This takes time and can be a slow process.
Visit	Sort out a daily budget, considering all on-ground expenses	Vehicle, petrol, food, driver, security, laundry, deal with banks or cash, gifts etc.
	Take or Organize emergency phone	Use local sim card, they are cheaper. Add emergency numbers list & contacts for help.
	Rotary Project Team	Advise visiting team members on clothing, equipment needed, weather conditions etc. Go to this website for tips for volunteers: http://www.rnzwcs.org/resources/