

A Submission to the Trustees of The Rotary Foundation by Rtn Peter Hall, President, Quality Education Nepal Inc.

the entity established to manage Rotary Australia World Community Service (RAWCS) Project 43/2009-10 when the sponsoring club RC Woodend (District 9800) chose not to accept that role as a long term obligation.

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1 Teacher training for Rural Nepal – an Urgent Need

Nepal is the poorest country outside of Africa. The long-term pathway out of poverty can only come from the better education of its population, allowing them to find their own way. Today's students – especially those in remote rural areas – are not receiving the quality of education that's needed. The weakest point in the education system is the lack of education and training of its teachers.

In 2011, when QEN began its campaign to address this issue, the majority of primary teachers had only Year 10 schooling before they commenced teaching. Government efforts have since raised this to Year 12 schooling. However, this applies only to Government-paid teachers – the third of teachers in Government schools paid by charities are exempt.

The Government provides some training, but Education Department Officers admit that it fails to motivate the teachers, in sharp contrast to the training sponsored by QEN.

Improving the training of teachers in Nepal, especially those in remote rural schools, should be the focus of a major push by Rotary International, rather than the rejection of a Foundation Global Grant as has recently occurred.

2 History of training sponsored by QEN Inc.

The author joined RC Woodend, D9800 in 2009. He persuaded the club to register RAWCS project 43/2009-10, and in 2011 a project to train 40 teachers of Myagdi District was commenced, aided by a Foundation District Grant. Their training continued over the next two years, funded from sources outside of Rotary.

In 2014 QEN sponsored the establishment of LEARN as a local NGO to deliver the training, there no longer being a service provider in Nepal able to deliver the service required. Two more three-year programs began, bring a further 115 teachers into training. The RI Sydney Convention saw the start of a campaign to raise Global Grant funding for yet another three-year program.

The campaign attracted the support of eight Australian clubs from three districts, leading to GG1525855, training 75 teachers, which commenced in April 2017. That program has been a marked success, despite project management inadequacies on the part of the Host Sponsor club.

In 2018 a new campaign was initiated, to fund further Global Grant projects, as this was seen as the best strategy to extend training to more teachers. Sponsorship commitments were gained from 55 clubs throughout ANZ, Europe and North America – sufficient to fund two projects to a total value of \$250,000, to train a further 160 teachers over three years.

Almost all of the funding attracted by QEN to date has come from sources outside of Rotary. This includes AU\$1.5m. now invested as a capital fund providing secure income for the development of LEARN and funding activities that fall outside the scope of Global Grant projects, such as annual refresher training for those teachers who have completed their three-year basic training.

3 Submission and rejection of Global Grant application 1876442

Application GG1876442, sponsored by RCs Woodstock-Oxford, D7080, Ontario, Canada and Kathmandu Metro, D3292, Nepal was submitted on 26 June. ON 26 July, TRF advised that the project was not eligible for a global grant. The rejection appears as Appendix 1.

Regional Grants Officer Laura Bradley's reasons for rejection were threefold:

- "the application was not planned based on a community assessment" – this despite the fact that the Community Assessment Form had been completed and submitted, along with an Addendum providing additional information. A second Addendum was subsequently prepared for discussion with the DRFC, D3292 (refer Appendices 2, 3 and 4).

The Host Sponsor club remains willing to conduct further community assessment should that be deemed necessary. Rather than encouraging such action, Ms. Bradley simply cancelled the application.

- "Global grants cannot fund activities primarily carried out by an organization other Rotary". This objection had been raised against GG1525855, which was subsequently approved.

The statement is remarkable. It ignores the fact that TRF has very extensive scholarship programs for individuals to attend universities that are not Rotary organizations. Why should Rotary support people to attend universities while is denying poor teachers the opportunity to attend LEARN's training courses?

- "it is concerning that a previous project with LEARN has had difficulty in providing the financial documentation necessary to meet the Foundation's reporting requirements".

This point is addressed in Appendix 5. It refers to the failure of the Host Sponsor of GG1525855 to fulfil project management responsibilities. This led to a progress report due 29 Aug. 2018 not being submitted until 22 April 2019. It is unreasonable to hold that deficiency against a project in which that club has no role whatever.

GG1876442 is funded 100% by Canadian clubs matched by DDF at 85c./\$, both matched \$/\$ by the Government of Canada. GG198766 is ready to follow, funded by 41 clubs from seven countries. In advising rejection, Ms Bradley failed to acknowledge this remarkable level of international support.

4 An alternative model for Global Grant applications

It would appear that at the root of TRF's objection to this project lies an objection to the way it was conceived and developed. In an email to me on Jan 16, Ms. Bradley advised: *"the Foundation has a longstanding policy of communicating about a project with the primary contacts directly. Due to your role with LEARN, you will not be able to act as the primary contact."*

That is a perfectly valid point, and should most certainly apply during the conduct of a project. It should not, however, preclude other parties participating in the development of projects.

TRF Guidelines define Cooperating Organizations and their possible roles. The NGO LEARN clearly fits that description. It does not, however, apply to QEN. I would define QEN as a Facilitating Organization, being a Rotary or Rotary-affiliated organization that facilitates the development of Global Grant applications.

Why should TRF recognize Facilitating Organizations? For a number of very good reasons:

1. They can focus on a need which is widespread in its occurrence but which is amenable to a proliferation of similar projects, committing resources to the development of appropriate solutions, and to developing the in-country capabilities needed to implement those solutions

2. By developing model projects they can achieve efficiencies that would not be attainable if every project is addressed as an independent, new initiative.
3. They can address needs that fall outside the scope of Foundation Global Grant projects in ways that effectively integrate the two.
4. They can be the link between two arms of Rotary that have each been highly effective, but which have the potential to work more effectively together – namely The Rotary Foundation and organizations like Rotary Australia World Community Service.
5. They can develop long term personal relationships which can be critical in international situations but which are less favored by the Rotary practice of replacing office-bearers annually.

What difference would such recognition achieve? Most significantly it would remove unwarranted suggestions of conflict of interest. In an email of 16 Jan, Ms Bradley said: “*As we discussed during the review of GG1525855, your involvement in the global grant for an application aiming to benefit your organization is a conflict of interest.*” What is the benefit to my organization to which she refers? As QEN is not-for-profit, its interests do not differ from those of the Rotary clubs it attracts as sponsors.

To sum up:

The model for Global Grant projects implied by the "Guide to Global Grants" and associated Terms and Conditions, at its simplest, conceives a club in the host country identifying a need; conducting a Community Assessment to confirm the need and the appropriateness of the proposed solution; and collaborating with one of more international sponsors to assemble the needed funding.

The alternative model that we propose is a Facilitating Organization (being a Rotary or Rotary-affiliated organization) identifying a need; working with the host community to confirm the need and identify solutions; and only then recruiting the participation of Rotary clubs as host and international sponsors. From that point on the process, and in particular the responsibilities for project delivery, are exactly the same.

5 Recommendations

1. Recognize the role that Facilitating Organizations can play a significant role in the development of Global Grant projects, and that this can yield to superior outcomes, of greater benefit to humanity at greater cost-effectiveness than individually initiated projects
2. Commission a review of TRF Guidelines to accommodate this recognition
3. Acknowledge the need in Nepal for better trained teachers, especially in its remote rural schools
4. Acknowledge that evidence of the appropriateness of the solution to this need and the solution offered by LEARN with the active support of QEN is provided by:
 - growing demand for LEARN training from the teaching community of Myagdi District
 - high voluntary attendance of teachers at LEARN training courses during their holiday time
 - requests by Municipal Councils that training be delivered in their areas
 - endorsement by the Social Welfare Council including the personal endorsement of its Vice-Chair
 - collaboration of the Department of Education in the planning and organizing of LEARN training courses
 - participation by Departmental staff in the delivery of all courses.

5. Direct TRF staff to review the rejection of GG1876442 in the light of information advanced in this paper, withdrawing all objections expressed to date and facilitating the approval of this and future projects of a similar nature to meet and address the identified need.
6. Direct TRF staff to withdraw demands for documentation of expenditures incurred by LEARN in respect of the delivery of services to GG1525855 to which Rotary is not entitled, and to acknowledge that the evidence of satisfactory service delivery in that project has been adequate
7. Train all TRF staff that they, like all Rotarians, are subject to the Four Way Test (refer Appendix 6)
8. To address an independent but related issue, increase the potential for collaboration across Rotary by making Global Grant project descriptions accessible to all Rotarians, searchable by area of focus, host country, year and status (following the example of RAWCS).

I respectfully submit this paper for consideration by the Trustees of The Rotary Foundation.



Peter Hall
Rotary Club of Kyneton, District 9800
President, Quality Education Nepal Inc.
Rotary Australia World Community Service Project 43/2009-10
10 August 2019

Appendix 1 – TRF response to the submission of GG1876442

From: Laura.Bradley@rotary.org
Sent: July 26, 2019 12:57 PM
To: Laura.Bradley@rotary.org
Cc: abby.mcneer@rotary.org
Subject: Rotary Global Grant GG1876442: Application declined

Dear Rotarians,

Thank you for your application for Global Grant 1876442: Teacher Training, Rakhu, Nepal.

The Rotary Foundation understands that your clubs are committed to supporting this project and congratulates you on this humanitarian commitment. Regrettably, the project is not eligible for a global grant because

- the application was not planned based on a community assessment. Clubs or districts that apply for a global grant to support a humanitarian project or a vocational training team must conduct a community assessment first and include the [results](#) in their grant application.
- Global grants cannot fund activities primarily carried out by an organization other Rotary.
- Additionally, it is concerning that a previous project with LEARN has had difficulty in providing the financial documentation necessary to meet the Foundation's reporting requirements.

This project as presented would be eligible for district grant funding. Please consider this as an option to fund this project if you have sufficient district designated funds available. The sponsors may also wish to consider posting your project on [Rotary Ideas](#), an online platform for seeking contributions, volunteers, materials and partners for Rotary projects. [Learn how](#) to start a project on Rotary Ideas.

If any cash contributions have been submitted for this grant, please inform the contributors they have 90 days to reallocate the contribution to another approved grant, Polio Plus, Peace Centers, or the Annual Fund.

I understand that this is not the information that the clubs involved hoped to receive. As such, please feel welcome to contact us with any questions or concerns. We look forward to working with you on your future Rotary service projects.

Respectfully,

Laura Bradley
Regional Grants Officer
The Rotary Foundation

Appendix 2 – Global Grants Community Assessment for GG1876442

GLOBAL GRANTS COMMUNITY ASSESSMENT RESULTS

Use this form to report community assessment findings to The Rotary Foundation when you apply for a global grant.

Assessing the strengths, weaknesses, needs, and assets of the community you plan to help is an essential first step in designing an effective and sustainable global grant project. See [Community Assessment Tools](#) for full instructions and helpful tips.

This form will help you report the results of your community assessment, and it's required when you apply for any humanitarian or vocational training team grant. Complete a separate form for each beneficiary community (e.g., school, health care system, or village), using information that is both current and specific to each community. Remember, you can't use global grant funds to cover the cost of doing an assessment, but you can use district grant funds.

Beneficiary community or institution

The entire community of Myagdi District, Nepal, in that better education in schools through better trained teachers will ultimately lead the country out of poverty. In the case of Global Grant Project 1876442, the immediate beneficiaries will be the Rakhu community within Rakhuganga Municipality.

Groups in the community that would receive a clear, direct, and immediate benefit from the project

Teachers of 16 schools that serve the Rakhu area, together with members of School Management Committees and Parent/Teacher Associations as they will also receive training.

Beneficiaries' demographic information, if relevant to the project

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Who conducted the assessment? (check all that apply)

- Host sponsor members
- International sponsor members
- A cooperating organization
- University
- Hospital
- Local government
- Other The program has been approved by the Social Welfare Council of Nepal.

Assessment dates

Such assessment is a continuing task of the staff of LEARN, the NGO established to deliver the training.

It is conducted in conjunction with all tiers of Government including:

- The Social Welfare Council giving formal approval to LEARN's three-year work plans (including personal support by the CEO / Vice-Chair of the Council)

- The Department of Education at both Central and District levels, reflected in a Memorandum of Understanding between the organizations, and active participation of the local Department of Education District Office in both the planning and delivery of all training courses.
- Local Rural Municipal Councils which also formally approve all training programs delivered by LEARN (including the personal support of the Chair of the Rakhugunga Council in a meeting on Dec. 1, 2018 with Peter Hall as President of Quality Education Nepal Inc. and Ronda Hall as co-director)
- Principals and teachers of all participating schools

What methods did you use? (check all that apply)

- Survey
- Community meeting
- Interview
- Focus group
- Asset inventory
- Community mapping
- Other Click or tap here to enter text.

Who from the community participated in the assessment?

Many people – see above list.

List the community needs you identified that your project would address.

1. Lack of adequate training of teachers in most rural schools in Nepal
2. Lack of motivation of those teachers that have received government-funded training, as specifically noted by the Myagdi District Education Officer.

List any needs you identified that your project would not address.

- 1 Ongoing refresher training in the years after the completion of the Global Grant funded three-year training program. This training will be funded independently by Quality Education Nepal Inc.

List the community's assets, or strengths.

- 1 Enthusiasm for training and the benefits it brings, as evidenced by 80-90% of teachers giving up their holiday time to attend (time that would otherwise be spent supporting their meagre living standards)
- 2 Local community support for the programs, both formal and informal
- 3 Rotary club support, though this is less specific due to the remoteness of the training area from where Rotary clubs normally operate in Nepal.

Considering the needs and assets you listed, explain how you determined the project's primary goal.

The project, and the entire program of which it forms a part, arose from the dreams and aspirations of Krishna Pun, former Principal of Paudwar Secondary School and now CEO of LEARN, who could not abide the village children missing out on the education that richer Nepalis could achieve for their children by sending them to private schools in the major cities.

How would your project's activities accomplish this goal?

By delivering training in the manner that we have established over the past eight years in Myagdi District, and previously developed by Rural Education and Environment Development (REED), funded by the Australian Himalayan Foundation, the NZ and UK Himalayan Trusts and delivered in the Solu Khumbu and other parts of Eastern Nepal.

What challenges have prevented the community from accomplishing the project's goals?

Lack of education within the community, and the government's inability to fulfil educational goals as a result of funding constraints and lack of motivation within the administrative and teaching communities.

How is the community addressing these challenges now?

By enthusiastically endorsing the training courses that we have so far delivered to 350 teachers of Myagdi District, and pleading for the training to be extended to their respective areas.

Why are the project's activities the best way to meet this community need?

LEARN's track record over the past eight years, wholeheartedly endorsed by the Nepalese government at all levels and by Rotary at all levels from clubs to DG and DGN.

Appendix 3 – Global Grants Community Assessment Addendum for GG1876442

As editing of the Global Grants Community Assessment Results form is restricted, this document is submitted as a supplement to further explain the process in respect of this application.

Community Assessment by Quality Education Nepal and its service provider LEARN is not a separate exercise for each individual project. It is a continuing process that began prior to our first introduction of teacher training in Western Nepal in 2011. This was a project by the Rotary Club of Woodend, District 9800, for 40 teachers of Shikha District, partly funded by a Foundation District Grant.

Since then, Quality Education Nepal and Mr. Krishna Pun as its representative in Nepal have been addressing the training needs not just of each small group of teachers for the next project, but of the 100,000 teachers working in Government schools throughout Nepal.

The starting point was the work over more than a decade of the Australian Himalayan Foundation, the NZ and UK Himalayan Trusts and others in fostering the establishment of the NGO “Rural Education and Environment Development” (REED) to train teachers in the Solu Khumbu and other parts of Eastern Nepal.

QEN engaged REED to deliver its training programs in Western Nepal until REED could no longer provide those services. This led to the establishment of LEARN in 2014 following a thorough search for alternative service providers which yielded no satisfactory result.

LEARN has been working ever since with local communities and Government at all levels to better understand the needs for teacher training and how these can be most effectively met.

The Global Grants Community Assessment Results form has been completed in the format required by the Foundation. This document is offered to provide supplementary information in relation to the ongoing process. It describes a particular example of how LEARN’s service offerings have been adapted to better satisfy community needs.

Introduction of “Awake and Shine” English Readers to LEARN training programs

In June 2017 members of the Rotary Clubs of Benalla (D9790) and Bairnsdale (D9820) became aware of LEARN delivering teacher training in Western Nepal through an article in the magazine Rotary Downunder.

The clubs had been supporting the Awake and Shine school which serves an expatriate Nepalese community in northern India for around a decade. Margot Sherwill, Benalla Rotarian, school principal and highly experienced literacy teacher, saw the opportunity for readers to improve the teaching of English literacy in the school. Over two years she developed a set of 144 readers conforming to the education system of Victoria, Australia but illustrated with vivid photos of village life in Northern India. The readers were designed for progressive use over four years from Prep to Grade 3. The two clubs arranged printing of seven sets of readers in two formats – A3 for classroom use, and smaller for children.

In April 2018 LEARN trainers attended a training course in India, delivered by Margot and her colleague Ula Sheather of the Rotary Club of Bairnsdale, in the use of the readers. They were very impressed with their suitability for use in Nepal and were given two complete sets (2 x 144 titles) for trial adoption. These have since been in use in two schools which Ula Sheather visited Nepal in February 2019 to assess progress.

The result has been the conclusion that the readers are ideal for inclusion in LEARN training programs. As their cost is substantial (US\$800 per set) the budget has been developed assuming that sets will be supplied to the 11 largest of the sixteen schools in the program. The decision was made on the basis that sets will also be provided to the five smaller schools if the budget contingency allows.

Appendix 4 – Second addendum to Community Assessment Addendum for GG1876442

This Addendum has been prepared following a further review of “Community Assessment Tools – A resource for Rotary Projects”. It addresses in particular a statement from Evanston that accompanied the recent distribution of those guidelines: *“If we see a project with multiple schools or villages that has the same activities, training, and equipment being purchased, it looks like the partners did not do a thorough community assessment as is required”*.

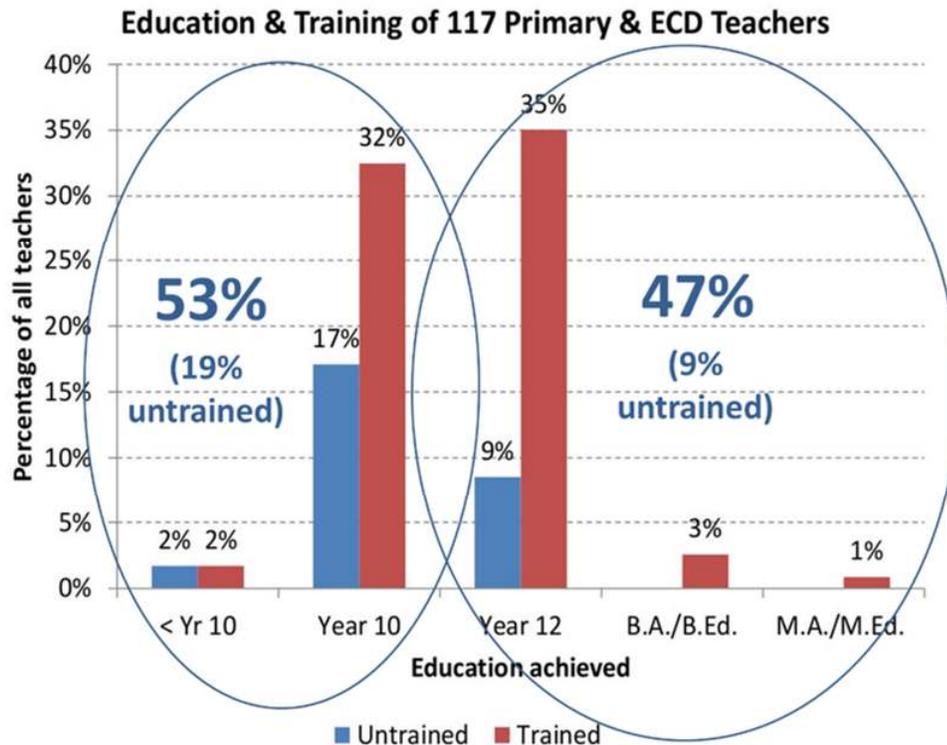
This has caused us to review the objectives of the Community Assessment, which we see as three-fold:

- to confirm that a real need exists within the community, and that the proposed solution is an appropriate way to address that need, accepted by the community as such
- to confirm that the budget and its allocation to activities within the program is appropriate
- to confirm that the specifics of what will be delivered are appropriate.

The Need for Teacher Training

As noted in the first Addendum to the Community Assessment, the need for teacher training in Myagdi District is well established, and should not require a separate exercise for each individual project. It has been continuously demonstrated since the initiation, in 2011, of a project sponsored by the Rotary Clubs of Woodend and Pokhara Annapurna to train 40 teachers of Shikha District, supported by a Foundation Grant from District 9800. It has been confirmed since then by:

- the findings of five Baseline Surveys undertaken in adjoining areas over the past seven years. These have shown the lack of education and training amongst primary teachers in the target area, as evidenced by the following graph:



The situation has improved somewhat since this graph was prepared as a result of the government raising the qualification requirements of government-paid teachers to Year 12 schooling. However, the new requirement does not apply to the considerable number of charity-paid teachers in government schools, nor to those staff who are appointed for other purposes (Office Assistants, Librarians etc.) but who undertake teaching roles. Together these account for 27.6% of the more than 300 teachers who have entered LEARN training to

date.

Reports of previous Baseline Surveys can be found at the website www.nepalaid.org.au / Teacher Training / Training Reports.

- continuing dialog between LEARN and the stakeholders in the programs they deliver. These included not only Teachers, Parents, Students, School administrators, School management committees and Ministry of Education as enumerated in the Community Assessment Guidelines, but also the Social Welfare Council and Rural Municipal Administrations. All of these stakeholder groups are intimately involved in both the planning and delivery of teacher training by LEARN.

Government endorsement

As an NGO operating in Nepal, LEARN is required to have its planned aid activities endorsed by the Social Welfare Council and by the relevant Rural Municipal Council. This is an exhaustive process encompassing budget analysis, and is directed to ensuring that programs do meet real community needs. The Rakhu project has received the endorsement of this process.

Rotary confirmation

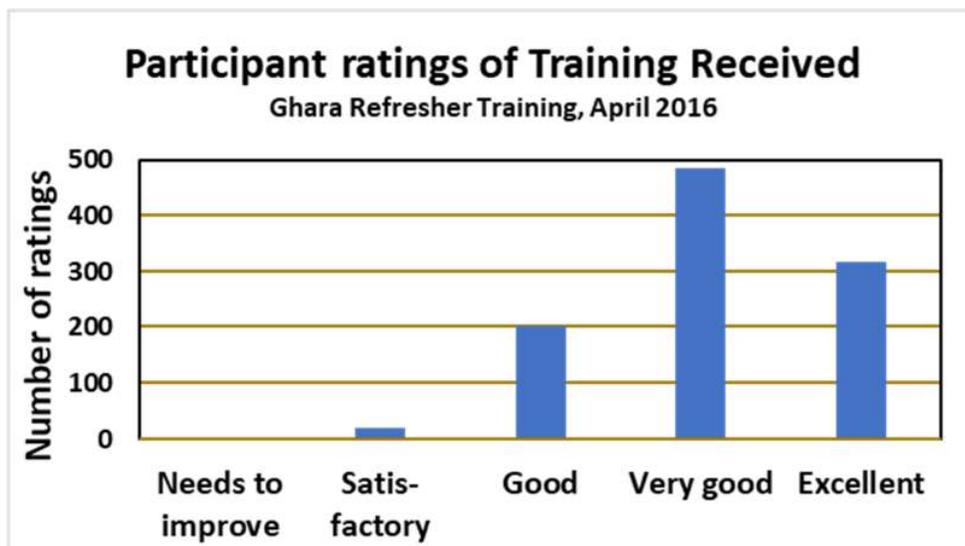
Peter Hall, as the Rotarian instigator of this and previous Global Grant project GG1525855, has participated in many relevant interviews over the past eight years to confirm these findings. These have included:

- In 2012, the then Myagdi District Education Officer, having visited the first training course noted above (involving a 4-hr ascent from the nearest road), summoned Mr Hall's volunteer party to meet him in his office in Beni. He was effusive in his thanks for the sponsorship of the program, and then issued the challenge: "*You are training 40 of my teachers. When can you train the other 1,200?*". QEN has been responding to that challenge ever since.
- Meetings with senior managers of the Department of Education in Kathmandu to discuss the match of LEARN programs with Departmental strategies
- Discussions with teacher trainees graduating from courses over the past eight years, receiving enthusiastic expressions of appreciation
- In April 2019 travelling with then Myagdi District Education Officer Ram Kumar Shrestha, discussing the benefits of LEARN training. Mr Shrestha made a particular point of the much higher motivation it achieves than government-sponsored training
- In April 2019, dining with Nilmani Baral, Vice-Chair of the Social Welfare Council, who has given strong support for the program.
- In November 2019, meeting with Bhab Bahadur Bhandar, Chair of Rakhugnga Municipality in which Rakhu is located, who was eager to have the training delivered to teachers in his area as quickly as possible.

Support for LEARN training as the right solution

The processes described above have given resounding support for LEARN training programs as the right solution to addressing this identified need. This is not to decry the efforts of the Department of Education to improve the training they provide (limited as it is by funding constraints), but is reinforced by the comments of their District Education Officer who noted the much greater motivation achieved by the LEARN training.

Further evidence of the appropriateness of the training is given by the surveys of trainees conducted at the conclusion of each course. These show very high levels of satisfaction:



Is the budget appropriate?

The critical determinant of the costs of training provided by LEARN are:

- the number of participating schools (in that all schools receive teaching materials for subsequent use, in quantities adjusted to the size of school)
- the number of teachers attending the training (attendance allowances of NPR500 = \$5 are paid to trainees in recognition of them giving up their holidays to attend. These are supplemented by a further 500 for those living remotely, necessitating accommodation. Together these account for 25% of the budget).

These have been identified in the planning of the project and included in the application in the form of the uploaded document "Participating schools".

An opportunity has arisen to enhance the LEARN training programs by the supply of sets of English readers (144 titles) to participating schools. The budget impacts of this were addressed in the first Addendum to the Community Assessment.

The specific budgeted activities of the training program are the outcome of ten years of development by the NGO Rural Education and Environment Development (REED) working in the Solu Khumbu area of Eastern Nepal, and by the continuing experience of LEARN. The broad format and the costs of the program are not affected by the tailoring of content that is undertaken to ensure that each course meets the needs of the specific attendees.

Are the specifics of what will be delivered appropriate?

This is an important question. It is why every LEARN training program is preceded by a Baseline Survey. This is a more comprehensive exercise than could be reasonably incorporated in a Community Assessment, involving LEARN trainers attending each and every school participating in the program, interviewing the teachers, documenting their education and previous training, and identifying specific needs and expectations. This is scheduled as the first activity of the project, leading to a comprehensive report.

The subsequent training activities will be tailored to the findings of the Baseline Survey.

Appendix 5 – Provision of Financial Documentation, GG 1525855

“it is concerning that a previous project with LEARN has had difficulty in providing the financial documentation necessary to meet the Foundation’s reporting requirements”

This statement of Ms. Laura Bradley could relate to one or both of two different issues:

1. The failure of the Host Project Manager to make available transaction data of the Project Bank Account
2. The failure of LEARN to deliver receipts detailing the project expenditures.

The two issues are completely different and un-related.

Transaction data of the Project Bank Account

The one progress report to date was prepared by the Project Manager for International Sponsor RC Portland. He was reliant on progress information supplied by the Project Manager for Host Sponsor RC Baglung, who supplied a six-page report with numerous photographs. This complemented a 21-page mid-term report by LEARN and the separate reports that LEARN delivered of each training activity (ten reports to date).

To complete his report the Portland Project Manager was reliant upon receiving financial data including banks statements from the Project Manager Baglung. Despite persistent requests, his delivery of this information was considerably delayed. As a result, the Project Manager, Portland did not complete his draft of the progress report that was due for submission on 29 August 2018 until December of that year. The Rotary Club of Baglung (President and Project Manager) then failed to endorse the report until 22 April 2019 – eight months late.

The Memorandum of Understanding made the two Rotary Clubs jointly responsible for the delay, with QEN and LEARN bearing no responsibility. Despite this, both organizations did their utmost to secure action from RC Baglung. This included two directors of QEN travelling to Baglung (a departure from their planned itinerary) to confront the project manager, to be advised that he had emailed the information the previous day.

Having had this bad experience, QEN took particular care to recruit a more reliable club as Host Sponsor for GG1876442. It is totally unfair that TRF should reject this new project for deficiencies of a club that is not involved.

TRF request for receipts from LEARN detailing the project expenditures.

The Project Manager for RC Portland has indicated that TRF has requested receipts from LEARN detailing the project expenditures. The reasons for LEARN making such a request are not clear. LEARN was engaged as Service Provider under terms set out in the Memorandum of Understanding between LEARN and the two Rotary Clubs. These included fixed-price quotations for the activities enumerated in the Global Grant application at the rates defined in the budget therein. No normal commercial service provider would expect, having given fixed price quotations, to be asked details of its actual expenditures.

Two further questions arise:

- 1) If the documents were supplied, who would analyse and interpret them (given that many are in Nepali)? On its record, Host Sponsor Baglung will not do this.
- 2) What conclusions may possibly be drawn from the analysis?

LEARN’s budget for GG1525855, which was uploaded to the Global Grant application, comprised some 120 line items. LEARN does not have a ready ability to compare actual expenditures with budget at this level of detail.

In my role as Manager of RAWCS Project 43/2009-10 I have concluded that it would not be in the interests of any parties involved for LEARN receipts to be supplied to either the Sponsor clubs or TRF, and have accordingly issued instructions against it. Should TRF adequately answer the above questions I would gladly reverse those instructions.

Appendix 6 – Issues with the TRF responses to GG1525855 and GG1876442

TRF responses to the GG1525855 and GG1876442 applications had much in common, while Ms. Bradley's third point relates to the execution of GG1525855, and specifically to the reporting thereof..

Approval of the GG1525855 application

This was a long, drawn-out process. The application was first locked for authorization in January 2016. It was finally approved on 28th February 2017. This was achieved only after the intervention of retiring Rotary Foundation Trustee Julio Sorjus and Rotary International Director Saowalak Rattanavich, both of whom became involved at the Seoul Convention where QEN had both a booth in the House of Friendship and a Break-out Session. Mr. Sorjus contacted Rotary Foundation staff, and also raised the issue with PRIP Kalyan Bannerjee

Among the issues that caused delay was an objection to the role of LEARN expressed by the statement that “Global grants cannot fund activities primarily carried out by an organization other Rotary”.

The project was subsequently approved with no change to the role of LEARN, but the same objection has been raised again.

TRF response to GG1525855 progress report

The failings of the Host club project manager of GG1525855 have been documented above. The project manager of the International sponsor has done his best to address the situation, but failing to make progress has appealed for help from me, and I have appealed for help from Mr Krishna Pun, CEO of LEARN. Both of us have received numerous promises of attention to outstanding matters from the Host project manager, to no avail.

My efforts to assist have been profoundly hindered by Ms. Bradley advising the International project manager against the sharing of correspondence: *“They strongly told me not to include you to avoid conflict of interest”*.

I have denied that conflict of interest in section 4 of this submission.

I expect to be returning to Nepal in November/December, and have offered to travel to Baglung to secure the banking details that the International project manager so desperately needs. No doubt Ms. Bradley would not approve of this, as she has said that for me to have access to such information would be a conflict of interest.

It is hard to imagine TRF finding a better way of obstructing a satisfactory project outcome than this.

Progress reports supplied

Despite his failure to provide banking details as requested, the project manager for the Host sponsor has been diligent in his progress monitoring and reporting. Yet the project manager for the International sponsor has advised me, referring to Ms. Bradley: *“She also wants to know how the Nepal Rotarians are overseeing the project. I referred her to KB's printed report, but it would appear she wants more information.”*

The project manager for the Host sponsor submitted a report for the Year 2017 May to April 2018 entitled “Global Grant Project 3 Year Teacher Training, Tatopani Resource Centre, Myagdi District, Nepal – Project Progress Status Report” which was prepared entirely by him. As well as describing the program it makes such statements as:

* in reference to the first 10 days teacher training program: *“Rotarian KB Shahi, manager of the RGG project from Rotary Club of Baglung managed to come on the opening day by afternoon and observed the training halls and interacted with the trainer team.”*

* in reference to Phase-II basic 10 days training program: *“Rotarian KB Shahi, Manager of the RGG project and Rotarian Purna Bahadur KC the President from Rotary Club of Baglung attended the opening program of Phase II 10 days training and observed and monitoring the training halls*

and interacted with the trainer team."

His monitoring would also have included review of the numerous progress reports submitted by LEARN. These included the following reports available for download from the QEN website:

- Programme Report, Basic Level Teacher Training Programme, 9th April to 18th April 2017 (22 pages)
- Report of the Refresher Training on Teacher Training for Child Centered Teaching Learning in Schools, 4-9 September, 2017 (19 pages)

Further reports received by the Project Manager will be loaded to the website in the near future.

Does TRF's response pass the Four-way Test?

The simple answer to this question is NO.

Is it the TRUTH?

No: As explained in Section 3 of the submission, Ms. Bradley's second reason for rejection of the application was that "*Global grants cannot fund activities primarily carried out by an organization other Rotary*".

Point 1: This is at odds with the widespread Foundation practice of funding scholarships to Universities. The difference between this and funding teacher attendance at LEARN programs is hard to fathom.

Point 2: LEARN's role in this project is as service provider. If payment of a service provider counts as funding the organization, then virtually every Global Grant project funds activities of organizations other Rotary.

Point 3: The same objection was made of GG1525855, with LEARN acting in the same role, but the project was approved.

Is it FAIR to all concerned?

Most definitely not – especially the rejection of GG1876442 on the basis of project management failures but the Host club of GG1525855, as it has no involvement in GG1876442

Will it build GOODWILL and BETTER FRIENDSHIPS?

No – members of the 13 Rotary clubs that have offered sponsorship of GG1876442, together with those of the further 42 clubs that have offered sponsorship of GG1987661 which has been prepared to follow, will be dismayed that their offers of funding have not been allowed to achieve their intended purpose of helping the needy people of Nepal

They have full access to the reasons, as this document has been posted to the QEN website.

Think also of the large numbers of teachers in the Myagdi District of Nepal who have expectations of Rotary-funded training.

Two Rotarians – Kym Stock, Project Manager of GG1525855 on behalf of the Rotary Club of Portland and I – have both foreshadowed that we will leave Rotary after more than ten years of service if the situation is not resolved to our satisfaction. We may not be alone.

Will it be BENEFICIAL to all concerned?

No – Most importantly of all, the teachers of Myagdi District will be denied the training they so richly deserve.

Appendix 7 – A Teacher Training Projects Comparison

QEN/LEARN projects, of which GG1876442 is typical

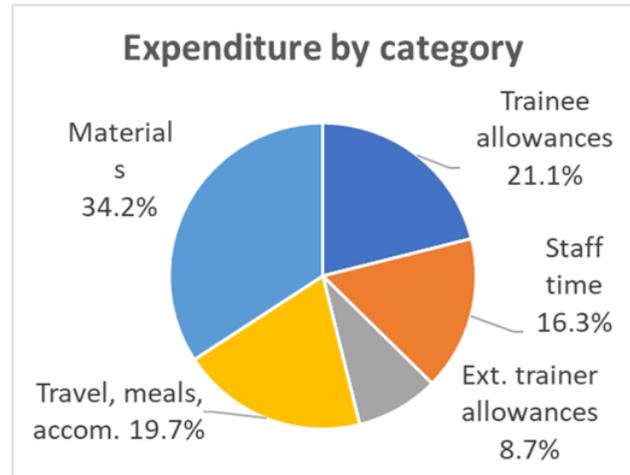
QEN-initiated Global Grant projects entail the engagement of LEARN as a local not-for-profit NGO in Nepal to deliver training to teachers of remote schools in Myagdi District, Western Nepal.

Each project gives each of 80 or so teachers around 50 days training over three years, progressing from basic pedagogy through to subject-oriented content. Training is delivered by masters-qualified Nepalese teachers who have the language, culture and curriculum knowledge to communicate effectively with the trainees, most of whom come from subsistence-farming backgrounds. Department of Education (DoE) staff collaborate in the delivery of all training programs.

Schools are identified in clusters comprising all or part of a Resource Center of the DoE. Teachers of primary classes of all community (government) schools in the cluster are invited to attend, irrespective of their salary source which may be government or private.

Courses generally run for six to ten days. Training is mainly offered in school holiday times to avoid disruption to classes. Modest attendance allowances are paid to cover expenses incurred (e.g. travel) and to recognize the commitment of holiday time.

Total expenditure equates to US\$25 per trainee day. Excluding materials which are passed to schools for subsequent use, the cost is just US\$19 per trainee day.



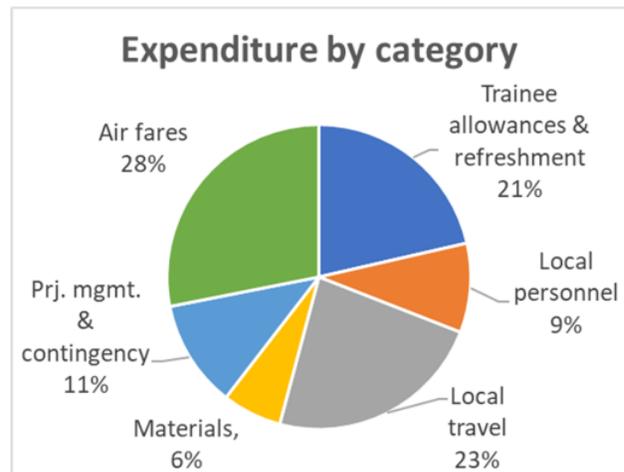
All expenditure is incurred in the host country, contributing to the local economy.

GG1643056 - D9800 Cambodian Remote Village Teacher Training

A Vocational Training Team of five experienced teachers travelled from Australia to Cambodia where five English speaking Cambodian specialist early-learning teachers acted as translators and assisted in training delivery.

Two four-day workshops were conducted, each day comprising 1/2 day preparation by tutors and 1/2 day workshop with teachers. Thus each trainee received two days training per workshop. They were trained in five groups of twenty, 100 per workshop.

Total expenditure equated to US\$142 per trainee day (7.5 times that of LEARN programs).. 28% of the expenditure (air fares) was incurred outside the host country.



Given the short training time per trainee, and the lack of knowledge by the Australian trainers of the local curriculum, the training could only address basic pedagogy.