

ROSEMOOR HOME FOR THE AGED

PRELIMINARY GLOBAL GRANT PROJECT PROPOSAL

WATER, SANITATION AND HYGIENE

REVISION 2

ROSEMOOR HOME FOR THE AGED

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AREA OF FOCUS – WATER, SANITATION AND HYGIENE

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INTRODUCTION

Area of Focus

This project has as its Area of Focus – Water, Sanitation and Hygiene within the (Rotary) Rosemoor Home for the Aged, George, Western Cape Province, South Africa.

The Home has been and is underserved with respect to an adequate supply of hot water for cleaning, sanitation and hygiene purposes. The project objective is to increase the available hot water for the various uses within the Home. This will improve staff working conditions and efficiency by not having to carry or move hot water over long distances and the lives of the Residents to be able to benefit from having it available as required. This is further detailed in this report and the Presentation appended.

Background

Rosemoor Home for the Aged (RHfA) was incorporated over 50 years ago as a centre for older citizens who are not able to afford retirement accommodation and care. It is a project that had been supported by RC George for many of those years and includes the Rotary name.

The RHfA has been extended continuously over the last 25+ years to accommodate more people, but no investment has been made to modernize the infrastructure to optimise water and energy consumption to modern standards. In addition, Government no longer sees its role to support such facilities and has therefore not spent capital on it for many years. This has resulted in a degradation of the Home in many ways and, in particular, hot water availability that affects so many aspects.

RHfA is a registered NON-PROFIT ORGANIZATION (NPO) receiving very little support from the George Municipality and Government funding is being reduced. Located in George, Western Cape, South Africa, it serves about 98 old and infirm residents (many of whom are incontinent), 24 of whom are in Frail Care, with 65 Care Givers and all support staff providing 24/7/365 care. It is the ONLY facility of this kind in the region and caters for the poorest of the poor of all races. Rotary Club of George has supported RHfA for many years, hence the inclusion of the Rotary name. The majority of patients are immobile and incontinent, which requires special beds, as well daily changes of linen. This requires sluicing and high temperature laundry machines to control possible spread of infections.

The expansion of the facility and hence numbers of residents, increased power costs of over 650% and inflation of over 300% from 2008 to date, have taken their toll on the amount of available hot water from a centralised geyser room for personal hygiene (baths & showers), sanitation (cleaning), kitchen use (cleaning, washing dishes, etc.) and laundry (of which there is about 150kg per day – soiled linen, clothes, bedding, etc.).

The residents have to queue from perhaps 04:30 to late morning to be able to bath or shower and may decide to miss breakfast or ablutions. The bathrooms and toilets have damaged tiles and/or some of the items themselves that require frequent deep cleaning and disinfection using unavailable hot water. In addition, with a number of Residents having dementia or Alzheimer's disease, having to wear adult diapers that sometimes leak, gives rise to urine or faeces on the floors that needs to be cleaned. The floors themselves also have broken or damaged tiles that expose the underlying concrete. Cleaning is an ongoing job that is hindered by the lack of hot water.



The laundry equipment is old, inefficient and undersized. It consumes large amounts of power, water and detergents and takes a long time per load making it difficult to meet the daily loads.

Fundamentally, the Home does not meet what would be considered modern standards and is an anachronism, with which RC George is assisting to improve, amongst others in the Community.

Considerable work has been done by RC George in defining improvements to:

- increase the availability and amount of hot water that can be used for personal and facility, hygiene and sanitation;
- supply the laundry and kitchen;
- upgrade the laundry equipment for both efficiency and capacity.

We propose the following improvements:

- Installation of decentralised heat pumps, short, lagged pipe runs – R509 100 (~\$28 189)
 - Installing adequately sized washing machines and tumble driers – R673 000 (~\$37 265)
- Rain water harvesting and distribution to aid a reduction of Municipal water consumption – R423 400 (~\$23 444).

We estimate that the improved systems will not only provide adequate hot water but also savings of about R20 000 per month (about US\$1 130) per month or more that can be used for care of the residents.

RC George has undertaken to assist Rosemoor Home for the Aged to improve the life of those living there and of the staff that care for them. Part of this is a major need to be able to reduce monthly costs of electricity for provision of hot water and laundry use of water that are consuming a substantial proportion of the available funds. This has resulted in limiting Rosemoor's ability to carry out required maintenance and reducing funds available to replace old and inefficient items and generally improve the quality of life of the residents.

In 2013 to 2015, considerable work was done by RC George in defining improvements to:

- reduce electricity consumption;
- reduce municipal water usage by capturing rainwater and using this for the laundry
- replace and install old, under-rated, inefficient washing machines and driers.

For a number of reasons related to increasingly poor governance at Rosemoor in the latter part of that time, RC George withdrew in late 2015 and the envisaged project was shelved.

In August 2021, Rosemoor approached RC George to again assist with a "wish list" of needs, if possible. They had replaced management, restructured the operation and obtained good audits for now five successive years. The RC George Community Committee assessed the situation and recommended to the Board that this represented an opportunity for helping them, subject to available funds and Members to be involved. Some of their "wish list" at the time has been fulfilled to date but requires continuation. The main project, as outlined here is still to commence, subject to funding via a Global Grant.

More recently, RC George has appointed two Club Members to the Rosemoor Board, as permitted by their Constitution, and remaining governance and operational issues will now be actively pursued and completed.

In the meantime, Rosemoor management and staff continue to provide a good level of care for the residents, despite limited government support. They are helped by families of residents, members of the George community and businesses where possible.

The work done to 2015 for the electricity and water improvements has been reviewed by the Rosemoor Engineering Team sub-committee and found to still be entirely valid. This will be used to develop an application for a Global Grant to be able to implement it.

The current billing for electricity is about R37 000+ per month and for water about R7 000+, with both of these having significant increases in line with the Municipal increases in July 2024. ESKOM (electricity) increases in early 2024, with a 25%+ increase expected in April 2025 will further impact Rosemoor.

Rosemoor management and residents have been trying to reduce usage of these utilities, to their own detriment, and have succeeded to some degree.

[NOTE: Italicised, bold text below is from the Global Grant format.]

PROJECT DESCRIPTION

The Rotary Area of Focus chosen is that of Water, Sanitation and Hygiene and the project will consist of the following:

- Improve the availability of hot water by replacing what was a centralized, coal-fired boiler that was replaced some years ago with a centralised, very under-capacity, electric geyser, with modern heat pump systems in proximity to the main points of use. This will result in hot water for use by:
 - Residents' bathrooms. The geysers here will be upgraded to a level such that adequate hot water is available, unlike at present where residents have to delay their ablutions for hours due to a lack of hot water. This will improve their sanitation and hygiene, as well as their well-being.
 - The laundry, which is a major consumer;
 - Kitchen use;
 - Reducing pipe runs between source and user, thereby reducing heat losses and waste of water by running hot water until the cold water has been replaced.
 - Installation of thermal insulation on piping;
 - Reducing power consumption by approximately 67%;
 - Electrical connections.
- Laundry system:
 - Remove existing domestic machines (under-rated for needs);
 - Install two, industrial-grade, efficient washing machines to save both water and power;
 - Install industrial-grade, efficient tumble driers;
 - Connect rain water supply to laundry.
- Rainwater system:

- Replacement of existing and installation of new gutters;
- Installation of rainwater storage tanks;
- Installation of rainwater pumps, filters and pipework to the laundry;
- Installation of pH adjustment system;
- Electrical connections.

The main scope of the project is illustrated in the attached drawings (Appendix 1):

Drawing No 0210/01A Upgrading of Hot Water System: General Layout

Drawing No 0120/02A Rainwater Collection Tanks: Layout and Details

Google Earth Satellite Image

It should be noted that a significant amount of work was done for the 2015 project, including engineering design and drawings, equipment specifications, bills of quantities and the issuance of enquiries for tender and the adjudication thereof, ready for preparation of a Global Grant Application.

The engineering work remains valid. Enquiries will need to be issued again, but this will be done **post-Grant Application** due to the timeframe this is likely to take and the tender validity periods. Instead, a budget estimate has been prepared using good engineering practice and techniques. This will be used for:

- Project motivation to RC George Members;
- Budget quantification for fund raising and motivation to other Rotary Clubs (International and Local) and to District.
- Use of the above budgeting to apply for a Global Grant.

PROJECT RESOURCES

Comment on people required to implement the work and/or who have indicated their willingness to be involved and active. Who will be responsible for what tasks / sections?

RC George

The Rosemoor Engineering Team consists of the following Rotarian Members of the Club:

- Charles Rowe (Civil & Hydraulics Engineer) (Club President 2024-2025)
- Wayne Hodgson (Electrical Engineer)
- Mike Tacke (Process Engineer)
- Dave Hill (Process Engineer)
- Christopher Pargiter (Water Purification Systems)
- Jon-Dylan Peterson (Quantity Surveyor)
- Andrew Jeffery (Accounting Officer) (Club Treasurer 2024-2025)

All of the above are very experienced personnel in their respective disciplines, with the first three having been involved in the original 2015 project. All the engineering personnel have Project Management experience, as well.

IPP/PAG Dianne Kershaw has been significantly involved in the Rosemoor project since its inception, focusing on the wellbeing and care of the residents. Her role in this project is coordination with RHfA, other clubs, both locally and internationally, in seeking funding. For example, with inviting of the Canadian and Austrian RCs to visit the Rosemoor complex in Q4 2024.

As 2023/2024 President of George RC, she has been involved in the revival of this project and will continue to drive it as the Rotary committee member on the Rosemoor board.

If other local / national or international clubs are willing to be involved, list these or state if this is to be a need for the project to progress and to what extent this will be sought

District

The support and funding (based on RC George contribution) from District 9350 has been sought and they have pledged funds toward the project. This will be a similar process for other Clubs in different Districts and international partners.

Other RC Clubs

International Club(s) Team Members will be included in the report once available.

Internationally, Mike Tacke has undertaken recent holidays in Germany and Europe and has spoken with and presented this project to Clubs in those areas, as and when he can, to seek possible partners, support and funding. This has proved unsuccessful due to them being occupied with providing assistance to local communities affected by severe storms and the war / “special military operation” in Ukraine.

With the assistance of PDG Carl-Heinz Duisberg, D9350, RC George was introduced to the Inter-Country Committee (ICC) of Austria. RC George has made presentations to the ICC Austria. The Chairman, Elisabeth Walther, visited RHfA on 13 October 2024 with a couple of RC George members.

As a result of a Rotary Friendship Exchange (RFE) between South African District D9350 and Canadian District D7815, lead by PDG Elva Heyge, their Members visited Rosemoor HfA in November 2024 and feel they could support RC George for this project.

A meeting of Rtn Chris Pargiter, RC George, with PP Conrad Heede, RC Grapevine, Texas at the RI Convention in Singapore has resulted in them requesting to be the International Sponsor.

RC George is engaging with local, South African Clubs to gauge support within the country.

Other Organisations

Are other local Service Clubs, NGOs or other organisations / businesses, etc. likely to be involved and to what extent.

RHfA is partially supported by the Western Cape Department of Social Services.

RC George will seek assistance from other local organisations who, to date, have been supportive of RHfA and of RC George projects, such as:

- Breede-Gouritz Catchment Management Agency (B-GCMA)
- Department of Agriculture (DoA)

In addition, the local George Municipality and Department of Social Services will be contacted and requested to become involved.

RHfA have implemented a Project Committee to deal with other much needed projects within the facility. RC George is part of this in order to co-ordinate with any projects that may have an impact on this project or one of theirs. A key one that is in progress, as at the time of this report, is replacement of the facility roof. Due to the nature of this project, there will definitely be interaction between them that will require appropriate planning.

MEASURING SUCCESS

How will you measure your project's impact? Find tips and information on how to measure results in the Global Grant Monitoring and Evaluation Plan Supplement. You need to include at least one standardized measure from the drop-down menu as part of your application.

Measure	Collection method	Frequency	Beneficiaries
Number of people with access to improved sanitation facilities	Direct observation	Every three months	50-99

Name of Individual or Organization

Manager, Rosemoor Home for the Aged

Briefly explain why this person or organization is qualified for this task.

The Manager is a Senior Nurse and a wholly qualified Manager for the work required in operating the facility. She has a competent team of personnel to assist her. She will implement the necessary processes, in conjunction with the Rotary Team, to monitor and maintain the installed systems.

PARTICIPANTS

COOPERATING ORGANIZATIONS *(optional)*

Name	Website	Location
Rosemoor Home for the Aged		Rosemoor George South Africa

<i>Name</i>	<i>Website</i>	<i>Location</i>
Breede-Gouritz Catchment Management Agency		George George South Africa

Do any committee members have a potential conflict of interest related to a cooperating organization?

☐ Yes
 ☒ No

List all relationships that district officers and other members of the sponsor clubs or districts (other than the members of the grant committee) have with any award recipients, cooperating organizations, project vendors, or other individuals or organizations that would benefit from the grant.

The Project Team believe it is beneficial and not a conflict of interest, but it is declared that IPP/PDAG Dianne Kershaw is a Board Member of Rosemoor Home for the Aged. This is in accordance with their Constitution that has a Rotary Club Member as part of the Board. This is to maintain an overview of the functioning of that Board and the operations of Rosemoor in terms of good governance and the principles of Rotary.

Why did you choose to partner with this organization and what will its role be?

Rosemoor Home for the Aged is the intended beneficiary of the Project.

PARTNERS (optional)

List any other partners that will participate in this project.

Contributing financial partners are thanked sincerely and are listed in the funding section of the report.

ROTARY PARTICIPANTS

Describe the roles and responsibilities that the host and international sponsors will have in this project. Please be specific. Which sponsor will receive and manage the grant funds?

The Host Sponsor, Rotary Club of George, will receive the pledged funds and manage these in accordance with the budget funding and good project management and accounting practice. The Host Club will:

- a. To prepare the necessary Global Grant Application.
- b. Project Manager to prepare and issue a detailed Project Responsibilities document, in accordance with accepted project management principles.
- c. To review and finalise the project design.
- d. To review and finalise the capital cost estimate and, hence, the Global Grant budget.

- e. Issue "Request for Quotations" to at least three entities, in respect of the Work Packages specified in the design.
- f. Adjudicate the Tenders received, together with the "International Sponsor Club".
- g. To liaise with "The International Sponsor Club" and other Sponsor Clubs via regular meetings – schedule to be agreed – and via written communications.
- h. To prepare the MoU between Rotary Club of George, "International Sponsor Club" and Rosemoor Home for the Aged.
- i. To assist with any Permissions/ Permits required for the work to commence.
- j. Project management and liaison with Rosemoor HfA Management.
- k. Arrange for equipment training and operation, as needed. Test and provide certification that this has been successful.
- l. Project Treasurer to arrange for storage and maintenance of financial records.
- m. Project Treasurer to make payments to suppliers based on payment schedules and/or submission of invoices approved by the Project Manager or designated Team Member.
- n. Project Manager to arrange for ongoing monitoring of the project outcomes and reporting to Local and International Sponsors for a period of three (3) years after completion.
- o. To complete and submit all required Rotary reports in a timely manner.
- p. To publicise this project to the local public, our club and district.

The International Sponsor, Grapevine Rotary Club, will:

- a. To liaise with RCG on an ongoing basis and at an agreed schedule.
- b. To provide input, as necessary to the project design, as applicable.
- c. To assist with development of the Global Grant Application, as required.
- d. To assist with project fund raising with International Partner Clubs & Districts
- e. To complete and and all required Rotary reports in a timely manner.
- f. To publicise this project to our club, our district and worldwide through MG.org & RWAF.

Describe how the partnership between the host and international sponsors was formed. What agreement have the sponsors made toward ensuring that the project will be implemented successfully? How will they manage any challenges that arise throughout the project?

PROJECT COST ESTIMATE & FUNDING

Outline cost basis for the project ("guesstimate", high-level costing only with detail to be determined, budget quotes, firm quotes, etc.)

Cost Basis

The cost estimate is based on a combination of preliminary quotes and cost estimation using good engineering practice. It consists of the following:

- Preliminary quotes for the heat pumps;



- Preliminary quotes for the washing machines;
- Preliminary quotes for the tumble drier;
- Estimates for the pumping system based on recent, similar installations;
- Estimates for piping costs;
- Estimates for electrical work;
- Estimates for installation costs;
- Estimates for training costs;
- Budget accuracy;
- Escalation to project mid-point
- Project contingency

In addition, an estimate of maintenance budget will be need to be provided and will be made part of the MoU with Rosemoor for annual budget allocation from the savings obtained to ensure funding availability for preventative maintenance, not just failure maintenance.

Project Phasing and Planning

Comment on project phasing, if any is needed.

A detailed project plan will be prepared for the Global Grant and following updating of the quotes and delivery times. In addition, project timing will be integrated with any projects being undertaken by RHfA themselves to avoid interference or to benefit.

Quotes (or other)

Comment on quotes obtained.

Budget quotes have been obtained for the main project equipment. Updates will be obtained once we have gained an international partner or partners.

Project Cost

The budget estimate is R1 872 000 (~\$103 660) as at December 2024. The Rotary International Rand / US \$ exchange rate of R18.06/\$ for 1st December 2024 has been applied.

The summary estimate, inclusive of VAT & contingencies for each section, is as follows:

ROSEMOOR HOME FOR THE AGED UPGRADE BUDGET ESTIMATE

ITEM		ESTIMATE	SOURCE
Water and Energy Project: Provision of Heat Pumps		R430,601	CR
Rain Water Harvesting and Heat Pumps for Laundry		R569,244	CR
Laundry Equipment - washing machines		R238,798	MT
Laundry Equipment - tumble drier		R84,325	MT
Laundry equipment installation		R35,000	Guesstimate
Sub-Total @ 3 Sept 2022		R1,357,967	
Estimate base date	03/09/2022		CR
Estimate current date	25/01/2024		
Escalation period from base	510		days
Escalation	12%		p.a.
Escalated value to current date		R1,605,479	
Contingency (10%)		R160,548	
Sub-Total @ current date		R1,766,027	
Escalation to project mid-point (12% p.a.)		R105,962	
TOTAL		R1,871,989	
PROJECT BUDGET ESTIMATE		R1,872,000	
Current Exchange rate	06/12/2024	18.06	19.01
PROJECT BUDGET (US\$ / €)		\$103,660	€ 98,480

December 2024 RI Rand/US\$ exchange rate used. Rand/Euro based on RI rates (R18.06/\$ & €0.95/\$) for comparison.

Escalation calculated at 12% per annum with 6 month mid-point. Frozen at Jan 2024 following checks on equipment prices at that time. Recent checks also show marginal change as at December 2024, hence freeze held.

The following caveats are relevant:

- The Rand/\$ exchange rate will be a concern, as we know that this fluctuates considerably and will affect the ultimately available funds.
- Rotary International have adopted a policy of using the exchange rate to the US\$ as of the 1st of each month, rather than on the day of payment of any Grant authorised.
- The laundry equipment power consumption needs to be reviewed against the intended operation using hot water from the heat pump systems, as the quoted units are “stand-alone and include a fixed charge against the power supplied..
- Rosemoor electrical supply will need to be reviewed against the laundry unit requirements and that used by the remainder of Rosemoor.

Funding Raising

Outline the funding requirements and intended approach for fund raising, as this will be required.

As at 2 September 2025, the following is listed in the Draft Global Grant Application online, with a number of other sources to be confirmed.

Step 9: Funding

Tell us about the funding you've secured for your project. We'll use the information you enter here to calculate your maximum possible funding match from the World Fund. ?

#	Source	Details	Amount (USD)	Support*	Total	
1	Cash from Club	George [Rotary Club]	11,200.00	560.00	11,760.00	
2	District Designated Fund ...	9350	2,500.00	0.00	2,500.00	
3	Cash from Club	Grapevine [Rotary Club]	15,000.00	750.00	15,750.00	
4	District Designated Fund ...	5790	15,860.00	0.00	15,860.00	
5	Cash from Club	Wolfville-Mud Creek [Rotary Club]	7,000.00	350.00	7,350.00	

[+ Add funding source](#)

*Whenever cash is contributed to the Foundation to help fund a global grant project, an additional 5 percent is applied to help cover the cost of processing these funds. Clubs and districts can receive Paul Harris Fellow recognition points for the additional expense.

How much World Fund money would you like to use on this project? ?

You may request up to 14,688.00 USD from the World Fund.

14688

Funding summary ?

PLEASE NOTE
This grant has a funding total not equal to the budget total amount.

DDF contributions: 18,360.00

Cash contributions: 33,200.00

World Fund: 14,688.00

Total funding: 66,248.00

Total budget: 106,545.00

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Rotary Club of George has currently allocated R200 000. Club Members continue to be canvassed for assistance in this respect to utilise possible overseas contacts.

In addition, RC George will continue to try to raise funds to increase its own contribution to over R300 000 during 2025.

RC George is seeking support and budget funding amounts from International Clubs in order to be able to progress a Global Grant request

RC Wolfville-Mud Creek, Nova Scotia, Newfoundland & Labrador, D7815 - Funding pledge.
RC St. John's East, Newfoundland and Labrador, D7815 - project support and funding?

PROJECT PLAN

What is the project plan in terms of resourcing, costs and duration?

This will be developed in detail once we have been able to ascertain funding and the Global Grant availability and timing.

It should be noted that:

- Lead time from date of order and payment of deposit for the laundry equipment is 14-18 weeks from the one proposal submitted. These are the long lead items and we will work within these times for the balance of the items, where possible, these include:
- Heat pumps are locally available and delivery can be within two to three weeks from order.
- Tanks are readily available.
- Pumps are readily available.
- Civils work are estimated to be under two months to complete, once appointed.
- Electrical work will be planned within the project duration.

SUSTAINABILITY

Sustainable projects provide long-term solutions to community problems — solutions that community members themselves can support after grant funding ends. Your answers to the questions below will help us understand the components of your project that will make it sustainable.

Project planning

Describe the community needs that your project will address.

The Home has been and is underserved with respect to an adequate supply of hot water for cleaning, sanitation and hygiene purposes. The project objective is to increase the available hot water for the various uses within the Home. This will improve staff working conditions and efficiency by not having to carry or move hot water over long distances and the lives of the Residents to be able to benefit from having it available for personal hygiene and sanitation, as required.

How did your project team identify these needs?

By conducting a Needs Analysis, as covered in the Community Needs Assessment Report.

How were members of the benefiting community involved in finding solutions?

Rosemoor management were involved together with the Chairman & Vice-Chairman of the Residents Association. Their combined knowledge of the difficulties experienced by the Staff and Residents with the existing equipment and facilities and suggestions made were incorporated into the project scope.

How were community members involved in planning the project?

Rosemoor management and the Residents Association have been involved with the project all along and are kept informed on progress. Once we submit the project for approval, we will commence detailed planning together with them to ensure that any project impact during construction and/or commissioning is minimized or eliminated.

Project implementation

Summarize each step of your project's implementation.

Do not include sensitive personal data, such as government ID numbers, religion, race, health information, etc. If you include personal data, you are responsible for informing those whose personal data is included that you are providing it to Rotary and that it will be processed in accordance with Rotary's [Privacy Policy](#).

#	Activity	Duration
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[Add Activity](#)

Will you work in coordination with any related initiatives in the community?

☒ Yes ☐ No

RC George is represented on the Rosemoor Project Team, which is an initiative of the Rosemoor HfA Board that raises funds for the Home, implements other smaller projects and assists, as needed. Good co-operation exists between RCG and this Team to ensure that overlaps or possible timing or other issues are avoided. This Team meets regularly and reports to the Rosemoor HfA Board.

Please describe the training, community outreach, or educational programs this project will include

Staff training for operations will be carried out on the equipment and systems installed. This will be done by the equipment suppliers. The training cost and schedule will form part of the tender. This is particularly relevant for the laundry equipment and heat pumps. The water harvesting system training will be carried out by RCG Team members, many of whom are familiar with this type of equipment. Training material will be compiled from supplier information.

The training will include any simple maintenance requirements, together with requirements for scheduled and/or breakdown maintenance. The latter will require supplier personnel. Community outreach and other education programmes are not foreseen at present.

How were these needs identified?

They are an important part of ensuring correct operation and maintenance of the equipment, thus contributing to sustainability.

What incentives (for example, monetary compensation, awards, certification, or publicity), will you use, if any, to encourage community members to participate in the project?

Not currently applicable nor envisaged.

List any community members or community groups that will oversee the continuation of the project after grant-funded activities conclude.

This will be Rosemoor HfA management together with the Rosemoor Board. The latter comprises volunteers from the community that are elected at the Rosemoor HfA Annual General Meeting in accordance with their Constitution. RC George is represented on the Board and the appointed Member will be responsible for reporting back to the Club. The RCG Project Team will then be able to report back to project sponsors.

Budget

Will you purchase budget items from local vendors?

☒ Yes
 ☐ No

Detailed Scopes of Work (SoW) were issued to local vendors of the types of equipment required and for construction and installation needs, within George or in South Africa to provide budget quotations that were used to compile the project budget.

The budget is an important item that we are in the process of reviewing and updating. The Scopes of Work remain satisfactory. Recent checks have shown that some of the equipment prices are not that dissimilar to the original values. Installation costs have escalated, but these are within the escalation values used.

We have used the escalated value for now, as we do not want to issue formal Requests for Quotation until we obtain adequate funding pledges and have the Global Grant Report well underway with the necessary District and other reviews, because this could lead to use of lengthy, quote validity periods. We believe that this is unfair on our local suppliers and, given the volatility of the South African Rand, unrealistic to ask. Before populating the Global Grant Budget section, we will have properly reviewed the budget.

Did you use competitive bidding to select vendors?

☐ Yes ☒ No

Competitive bidding against the defined Scopes of Work will be implemented.

At present we have used an escalated budget value from the above process, as we do not want to issue formal Requests for Quotation until we obtain adequate funding pledges and have the Global Grant Report well underway with the necessary District and other reviews. These could lead to use of lengthy, quote validity periods. We believe that this is unfair on our local suppliers and, given the volatility of the South African Rand, unrealistic to ask.

Do any committee members have a potential conflict of interest related to a vendor?

☐ Yes ☒ No

Please provide an operations and maintenance plan for the equipment or materials you anticipate purchasing for this project. This plan should include who will operate and maintain the equipment and how they will be trained.

The equipment will be operated by the staff of Rosemoor HfA and simple maintenance carried out by them, as per supplier training.

Maintenance will be carried out in accordance with supplier warranty conditions for the warranty period, at a minimum. This will be reviewed during the project period and revised post-warranty, if necessary.

Describe how community members will maintain the equipment after grant-funded activities conclude. Will replacement parts be available?

Rosemoor HfA Maintenance staff will be responsible for continuing to maintain the equipment and systems post-project. As RC George is represented on the Rosemoor Board, the Club will also be able to continue to monitor this critical aspect of sustainability. Assessment of tenders will include spare parts availability for the equipment offered and to be purchased. It will be preferable that there is at least ten years post-project availability. We will ensure that spare parts are available for the equipment purchased for at least ten years post-project.

If the grant will be used to purchase any equipment, will the equipment be culturally appropriate and conform to the community's technology standards?

☐ Yes ☒ No

None of the equipment is unusual for the Rosemoor Staff. Laundry equipment is in regular use, the heat pumps are essentially geysers and the rainwater system will operate itself. It will be a case of routine checks for the heat pumps and rainwater systems. Personnel will be trained on the specific equipment and operating instructions and manuals will be provided.



The community is urban-based and familiar with current technology.

After the project is completed, who will own the items purchased by grant funds? No items may be owned by a district, club, or member.

All the equipment will be owned by Rosemoor HfA and will be appropriately handed over.

Funding

Have you found a local funding source to sustain project outcomes for the long term?

☒ Yes ☐ No

Rosemoor HfA will be the main source of funds to continue the project, in terms of the MoU. The RC George team will continue to seek a local sponsor or sponsors to assist Rosemoor HfA to sustain the project in the long term.

Will any part of the project generate income for ongoing project funding? If yes, please explain.

No.

TRAINING

Training requirements and provision for this by suppliers will be included in the Scopes of Work for equipment and, hence, costing. (This was done for the earlier budgeting phase used here.)

Rosemoor Staff will be trained on equipment for which they will be responsible for operating and any simple maintenance / troubleshooting needed for routine operation.

A detailed training programme will follow, as part of the project, once information is received from successful tenderers / suppliers.

PROJECT AUTHORISATION

The 4-Way Test has been applied to the thinking and information in this document and the Community Services Committee believes it meets all the criteria.

The project has been authorised by the RC George Club; fund raising has taken place and funds allocated.

Rotary International District 9350 - South Africa West, Angola & Namibia



