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May 15, 1983

Dr. Marcus Ingle
Development Project Management Center
Office of International Cooperation
and Development
U.S. Department of Agriculture
Room 1304, Auditor's Building
Washington, D.C. 20250

Dear Marcus:

I am enclosing copies of the reports which I recently sent to Glen Fennell. The "Report on March, 1983 Consultancy and PROCALFER 1983 Microcomputer Training Plan" is a slightly elaborated version of the draft report that you took with you to Portugal. The "Preliminary Investigation of the Feasibility of Implementing PROCALFER Credit Line C through UCANORTE" is a new report covering the work that Noel and I did in Porto. I am also enclosing copies of the process notes that I took while in Portugal and some of the written materials that Noel, Maria, Ana and/or I produced in Portugal. These materials may not be very useful to you, but I prefer to err on the side of over informing you! Unfortunately, some of the process notes are hand written because my computer was broken down for quite a period of time.

I just finished the last of my Microcomputers in Local Government workshops for this year. With that off of my mind, I want to spend the next four weeks doing some writing. I have ideas about both the local government work and the Portugal work. I'll get a proposal to you as soon as I can.

What are we going to do for the social learning/development management workshop scheduled for next year's ASPA conference? We should get started on that soon.

Regards,

Ed

Ed Connerley

P.S. The written materials from Noel, Maria, Ana Edite and/or myself are included in part because I think that they represent incremental steps toward "manualization" of our work in Portugal. We need to do a lot more of this.

May 14, 1983

Dr. Glen Pernel
USAID Lisbon
APO New York, N.Y. 09678

Dear Glen:

You will find enclosed the reports from Noel Berge and I concerning our March consulting work in Portugal. I must apologize for the delay in getting these final versions to you. The lingering cold that I brought back from Portugal with me, the press of other work here and delays in exchanging versions of this report with Noel have contributed to my tardiness. I hope that you have been able to proceed with planning for the microcomputer systems based on the draft report that I sent with Marcus Ingle.

There are two reports and a floppy diskette enclosed. The reports are self explanatory. The diskette is included so that you may print your own copies of the reports should you so desire. You may, for instance, want to print a copy on the letter quality printer which has, I hope, been delivered by now. The reports on the diskette are ready for printing except for formatting commands, which may have to be inserted by your staff since European paper sizes are different than those with which I am working. Please make and distribute copies as you see fit. I have sent a copy to Marcus.

If you have questions about these reports or other aspects of my work with PROCALFER, feel free to contact me at any time. I look forward to working with you in June.

Sincerely Yours,

Ed Connerley

REPORT ON MARCH, 1983 CONSULTANCY AND
PROCALFER 1983 MICROCOMPUTER TRAINING
PLAN

SUBMITTED TO
DR. GLEN FERNELL
CHIEF OF PARTY
PORTUGAL AGRICULTURAL PRODUCTION PROJECT
OFFICE OF INTERNATIONAL COOPERATION
AND DEVELOPMENT
UNITED STATES DEPARTMENT OF AGRICULTURE

SUBMITTED BY
NOEL BERGE AND ED CONNERLEY
MAY 14, 1983

11

Report on March, 1983 Consultancy and PROCALFER 1983 Microcomputer Training Plan

I. INTRODUCTION AND BACKGROUND OF CONSULTANCY

This is a joint report on the consultancies of Noel Berge and Ed Connerley. Connerley was in Portugal March 1 to April 1. Berge was in Portugal March 15 to March 30. A joint report is being submitted because the scopes of work of the two consultants are closely related and the consultants worked together for much of the time. The objectives of Connerley's consultancy were to help the PIMS team and Coordinating Group to further develop plans for PROCALFER regional cost estimation and budgeting work, to produce a phased plan for the introduction and use of microcomputers by PROCALFER and to participate in the training of PROCALFER staff in the use of microcomputers. Berge's objectives were to conduct introductory microcomputer training in several subject areas for PROCALFER staff and to prepare a plan for use of the microcomputers. During the consultancy Eng. Almeida Alves requested that the consultants respond to a request from UCANORTE (Cooperative Union of the North) for assistance in diagnosing their possible need for a microcomputer in the administration of PROCALFER credit line "C." A separate report has been prepared on the work performed in response to this request.

II. ORGANIZATION OF THIS REPORT

The report is divided into five major sections --- Introduction and Background, Organization of this Report, Activities During Consultancy, Findings and Recommendations.

III. ACTIVITIES DURING CONSULTANCY

1. Cost Estimation and Budgeting

During the early phases of Connerley's work, considerable time was spent in helping the PIMS team to improve their approach to the regional cost estimation and budgeting process. There were two primary aspects to this work. The first was the attempt to standardize the cost estimation and budgeting process used in all regions. Increased standardization was achieved by agreeing on standard definitions for the project indicators that are used in the cost estimation process and by adopting standard assumptions where assumptions are necessary and cost sensitive. Connerley worked closely with Edite Azenha of the PIMS team and participated in two meetings of the PIMS team with Planning Cabinet representatives Elvira Hugon and Antonio Miguel in which the standards were established. The second aspect of the budgeting work was the presentation of "PROCALFER VisiCalc Cost Estimation and Budgeting Procedures: VisiCalc Templates and User's Manual," which had been developed by Connerley in the United States under contract to DPMC. The intended use of this system in the regional cost estimation and budgeting process was explained and team members were given an opportunity to practice using the system. The team has agreed to send written feedback about needed improvements to Connerley in the United States. Only minor, largely cosmetic, changes will be made before it is used in the regions in May. Numerous improvements in the manual will be made, but not before

the system is used in the regions.

2. Regional Project Monitoring System

In parallel with the above budgeting work, Connerley was involved in the design of PROCALFER's regional project monitoring system. It was decided that emphasis should be placed on monitoring regional project indicators with secondary attention to project expenditures during this first year of the monitoring activity. In essence, this decision represents a "bet" by the PIMS team that the costs which have been estimated for regional project activities are close enough to actual costs that the regions will not be able to divert significant PROCALFER funds to non-PROCALFER activities if they are held responsible for the PROCALFER activities as reflected in the regional plan and budget. Monitoring of project activities will be accomplished by requiring reports on project activities twice a year, in phase with the twice a year cropping system of Portuguese agriculture, and following up the reports by visits to the regions during which the accuracy of reported activities will be verified by visits to the sites of reported activities. Financial monitoring will be based only on "total" expenditures, since more detailed monitoring would create an adverse reaction in the regions and is likely to prove unfeasible at this time. It is hoped that an expanded financial monitoring system will be feasible in coming years and that current monitoring efforts, financial and others, will contribute to, rather than detract from, the perceived legitimacy of such efforts in the regions.

3. Microcomputer System Installation

PROCALFER's first microcomputer systems were delivered in mid-february, 1983. At that time two Apple Europlus computers with part of their intended peripheral equipment were delivered. Three microcomputers and several peripherals and enhancements had been ordered. Some of this equipment has still not been delivered. An excessive amount of the consultant's time has been devoted to trying to get the ordered equipment delivered and installed. In addition, some relatively minor, but continuing, problems have been experienced with the equipment delivered, which has required further involvement of the consultants in seeing that the dealer properly repairs the equipment. Additional time was spent in establishing a software library, procedures for use of the computers and other "start-up" activities.

4. Applications Development

The consultants and members of the PIMS team worked on a one-to-one basis with potential users of the microcomputers to identify and define additional applications. These sessions served primarily to match user needs with the capabilities of appropriate pieces of software. Pedro Damiao worked with VisiCalc and DB Master. Victor Oliveira worked with DB Master. Mario de Carvalho worked with SPS and the "Stat Pak" module of DB Master. Each of them has a well defined potential application for the microcomputers.

5. Coordination with other American Consultants

Since the management applications of the microcomputers will of necessity enter into areas for which other consultants have primary responsibility, we decided to get input from those consultants concerning their views of the most useful applications of the computers. We interviewed Bill Dahnke about the potential uses of the microcomputers in processing research field data, demonstration field data and soil test data. We also interviewed Jim Lauth concerning the use of the microcomputers in the limestone distribution tracking and subsidy calculation process. We also supported the work of the Policy team by loaning them equipment and advising them on the use of the equipment.

6. Microcomputer Training

Six and one-half days of formal microcomputer training were provided. Noel Berge took primary responsibility for planning and coordinating the training and conducted the sessions on Word Processing, DB Master and Statistics. Ed Connerley presented the sessions dealing with VisiCalc. The "Introduction to Microcomputers" and "Executive Briefing" sessions were presented by both consultants. Portuguese counterparts, were involved in all training sessions as co-trainers. The training was presented as follows:

<u>Time</u>	<u>Subject</u>	<u>Participants</u>
03/16/83, p.m.	Executive Briefing	Coordinating Group (3)
03/18/83, all day	Word Processing	Clerical Staff (7)
03/21/83, all day	Introduction to Microcomputers	Clerical Staff (7)
		Regional M. S. (2)
		Other Regional (3)
		PIMS Team (3)
		C.G. Staff (3)
		Planning Cabinet (3)
03/22/83,	VisiCalc	Regional M.S. (2)
		Other Regional (3)
		PIMS Team (3)

		C.G. Staff (3)
		Clerical Staff (1)
		Planning Cabinet (3)
03/22/83, p.m.	DB Master	Same as a.m.
03/23/83 all day	Statistics	C.G. Staff (2)
		Other Regional (3)
03/24/83, a.m.	VisiCalc	Same as 03/22/83, a.m.
03/24/83, p.m.	DB Master	Same as 03/22/83, a.m.
03/25/83, a.m.	VisiCalc	Same as 03/22/83, a.m.
03/25/83, p.m.	DB Master	Same as 03/22/83, a.m.

IV. FINDINGS

The major findings of this consultancy are:

1. Regional participation in the training sessions was not as thorough as anticipated. Just two regional Management Specialists (those from Trás Os Montes and Beira Litoral) participated in the full five days of training that had been prepared for them. Some regions sent representatives from their data processing sections rather than sending their Management Specialists (Beira Interior, Entre Douro e Minho and Algarve).

2. Priorities for applications development and use of the microcomputers were established by the PROCALFER Coordinating Group to be as follows:

a. Statistical analysis of research field data, demonstration field data and soil test data;

b. Regional budgeting and monitoring;

c. An information base using the monthly regional reports as input;

d. Also supported, but not specifically ranked, were the limestone distribution monitoring and subsidy calculation work and the credit applications analysis.

3. Training sessions were made more difficult by the variety of interests and skill levels represented by the participants.

4. Several Portuguese, including members of the Coordinating Group, expressed concern about the lack of Portuguese punctuation marks in the printed output of the microcomputer systems.

5. Several key issues concerning the management and use of the microcomputer systems are not yet resolved. Decisions should be made regarding responsibility for the hardware and software; permitted, preferred and prohibited uses of the machines; establishment of user support systems and so forth. Responsibility for these systems is not yet clearly decided between the American and Portuguese sides of the project. The Americans feel that the Portuguese should make these decisions. The Portuguese are unwilling to make these decisions until ownership of the systems has been formally transferred to them. The transfer process is not likely to start until the purchase has been completed (several items have still not been delivered) and is likely to take several months to complete once started. Both Eng. Almeida Alves and Dr. Glen Fennell are aware of the problem and would like to resolve it, but no concrete solution has yet been proposed.

6. At the central (national) level, the PROCALFER project includes several activities which could benefit from application of the microcomputers. The persons responsible for several of these tasks are aware of the potential benefit of the computers and are motivated to use them. The Coordinating Group, although sometimes displaying a "wait and see" attitude, sees the microcomputers as a useful tool and potentially valuable addition to the project.

V. RECCOMENDATIONS

The PROCALFER microcomputer systems were purchased as a step toward the installation and use of a modern management information system at all levels of the project. In order to achieve that goal, we reccomend the strategies and actions listed below. No priority is suggested by the order in which they appear.

1. In the next several months microcomputer training in PROCALFER should be given in the form of applications development workshops, rather than formal training sessions. Applications development workshops are preferrable for several regions. First, they are consistent with the "learning by doing" emphasis of the PIMS effort. Secondly, such workshops would produce a "product," a defined and implemented application of the microcomputers, that would directly contribute to the objectives of the PROCALFER project. And, finally, a training strategy based on applications development would enhance central control over the eventual uses of the microcomputers at the regional level, if purchase of computers for regional use was conditioned on implementation of the applications developed in these workshops.

2. In the next four to six months, applications development should procede at the national and regional levels of the project. National level applications will be somewhat easier to develope since microcomputer systems are available full-time at this level, interested users have been identified and the Coordinating Group has

indicated its support for these applications. Regional applications may be more difficult to develop initially, but they remain fundamental to eventual project success.

3. It should be made abundantly clear to the regions that microcomputers will be purchased for regional use only in regions that have demonstrated the ability and desire to apply them to PROCALFER objectives.

4. The general sequence of microcomputer training in PROCALFER should be seen as involving the following steps:

a. Introduction---similar to the session that was recently conducted.

b. Applications Development---conducted with a relatively small group (1-6 persons) of potential users with homogeneous interests and skill levels. This group aims to apply the microcomputer to the work of members of the group.

c. Applications Implementation---conducted with a larger group of persons who are homogeneous with respect to interests, but may vary in skill level. This group aims to spread knowledge of the applications developed above to all interested parties (those with similar work) within PROCALFER.

d. More Powerful Programs---where and when necessary programs using the CP/M operating system will be introduced.

5. Early action should be taken to establish policies and procedures regarding the use of and care for the microcomputer systems. This may involve early resolution of the "ownership" of these systems or some provisional, temporary resolution of this issue. In any case, policies and procedures with regard to system use, support for users, and security of software and manuals are very much needed.

6. Since a number of easily identifiable apparently useful applications of the microcomputers do exist in PROCALFER, it is recommended that a consultant be hired to work with those PROCALFER staff directly involved in the further development of these applications. More specifically, it is recommended that the consultant work with Mario de Carvalho, Victor Oliveira and Pedro Damiao in developing their respective applications. This should be done as soon as possible since these individuals are highly motivated to use the microcomputers in their work. This work is likely to require one month of consulting time.

7. In light of the high priority placed by the Coordinating Group on the computerization and expansion of the work done by Mario de Carvalho, it is recommended that he be sent to the United States for advanced training after working with the consultant recommended above. His work/training in Portugal would center on how to perform the tasks that he is currently doing more efficiently and effectively by using the microcomputers. His training in the United States would be connected with the Coordinating Group's desire to expand the function

that he performs---specifically, to "integrate" the analysis of research field data, demonstration field data and soil test data and to have the computers prepare recommendations for limestone and fertilizer use based on the results of the soil tests and the farmers planting intentions.

8. As soon as it is feasible an applications development workshop aimed at developing regional PROCALFER applications should be conducted. This would involve a consultant working with 2 or 3 representatives from 2 or more regions for approximately one month. If all participants were agreeable, this workshop might focus on developing a computer-based monitoring system for the project. This workshop would be conducted in one or more regional headquarters using computers on loan from the central level.

9. The capacity to print documents in Portuguese, using the entire Portuguese character set, should be aquired as soon as possible. This capacity may already exist with other Apple users in Portugal. If it does not, it wouldn't be an exceedingly difficult task to create it. This could be done through a contract with a consultant.

PRELIMINARY INVESTIGATION OF THE
FEASIBILITY OF IMPLEMENTING PROCALFER
CREDIT LINE C THROUGH UCANORTE

SUBMITTED TO
DR. GLEN FERNELL
CHIEF OF PARTY
PORTUGAL AGRICULTURAL PRODUCTION PROJECT
OFFICE OF INTERNATIONAL COOPERATION
AND DEVELOPMENT
UNITED STATES DEPARTMENT OF AGRICULTURE

SUBMITTED BY
NOEL BERGE AND ED CONNERLEY
MAY 14, 1983

Preliminary Investigation of the Feasibility of Implementing PROCALFER Credit Line C through UCANORTE

I. INTRODUCTION

This is a report on the trip to Porto (UCANORTE headquarters) made by consultants Noel Berge and Ed Connerley March 27-29, 1983. The purpose of the trip was to do a preliminary investigation of the feasibility of implementing PROCALFER Credit Line C using UCANORTE and its member cooperatives as intermediary institutions in the delivery of credit to farmers. A separate, but related, report on these activities has been prepared by Jose Luis Pinheiro of AID and distributed to the interested parties. This report and that of Pinheiro complement each other, and may usefully be read together.

II. BACKGROUND

Sometime in February, 1983 a visit was made to UCANORTE by Mr. Donald Finberg and Jose Luis Pinheiro of the U.S. Agency for International Development, Eng. Almeida Alves of the PROCALFER Coordinating Group and a representative of IFADAP (name unknown). This visit had as at least part of its purpose the investigation of the reasons why Credit Line C has not, for all practical purposes, been implemented despite having been provided for in law since November, 1981. During discussions with representatives of UCANORTE it was suggested that Line C had not been implemented in large part because UCANORTE and its member cooperatives lack the experience and capacity to implement a line of credit likely to generate tens of thousands of additional administrative transactions per year, as is the case with Line C. Since the lack of capacity was thought to be particularly acute at the level of the cooperatives, it was felt that the primary administrative burdens should be undertaken by UCANORTE and that acquiring a microcomputer might enable UCANORTE to deal with the anticipated volume of transactions. Further study of the problem and tentatively proposed solution were obviously needed; so it was decided that the microcomputer consultants to PROCALFER, Connerley and Berge, would be asked to do a preliminary investigation during their March consultancy.

Eng. Almeida Alves requested that such an investigation be made shortly after Connerley's arrival on March 1; although he emphasized that this should not involve the sacrifice of previously scheduled work. Eng. Almeida Alves asked that Connerley contact Mr. David Assuncao of UCANORTE to arrange a brief visit and to establish the objectives of such a visit. There followed a series of conversations between Connerley, Assuncao and Jose Luis Pinheiro in which the terms and objectives of the visit were decided.

12

III. TERMS AND OBJECTIVES

The team included Connerley and Berge for their knowledge of management systems and their microcomputer expertise, Pinheiro to provide continuity with the prior discussions and Dra. Edite Azenha to provide liaison with the PROCALFER management effort.

Due to the press of other work for Connerley and Berge, it was initially decided that the visit would be made on just one day, March 28th. This was later extended to two days, March 28th and 29th, after Berge agreed to extend his stay in Portugal for one day. It was recognized by all parties that only a very preliminary study could be undertaken in the time available.

The objectives of the visit were established as follows:

1. Further define the problem(s) with the implementation of Line C;
2. Assess the utility of further study of the problem; and
3. Do a preliminary assessment of the previously proposed solution involving the aquisition of a microcomputer by UCANORTE.

The consulting team worked with the following representatives of UCANORTE:

- MR. Antonio Carvalho, Vice-President
- Mr. David Assuncao, Consultant
- Mr. Orlando Morgado, Financial Director
- Eng. Jose Maia, Agronomist

IV. ACTIVITIES

On the morning of March 28th all involved met at the headquarters of UCANORTE. The consulting team sought to familiarize itself with UCANORTE's experience in administering credit programs, particularly medium term production credit with large numbers of administrative transactions. We also sought the impressions of the UCANORTE personnel with regard to the likely number of requests for credit should Line C be implemented as contemplated. At this time we requested that Mr. Morgado prepare a detailed presentation of UCANORTE's present methods of administering the limestone subsidy program and his impressions of the changes necessary if credit were introduced. Mr. Morgado agreed to make that presentation on the following morning.

On the afternoon of March 29th we visited the cooperatives in Gondomar, Paredes, Penafiel and Felgueiras. These cooperatives were chosen because of their proximity and because they represented a wide range in limestone sales in the previous year. There was no-one to receive us at Gondomar; so it had to be dropped from our "sample." At

13

each of the cooperatives we met for 45 minutes to one hour with at least one Director of the cooperative and 3-5 local farmers who have used limestone. We were interested in their experience with limestone, their potential interest in credit for limestone purchases and their impressions of the best organization(s) to administer a potential credit program. The consulting team was accompanied on these visits by Mr. Carvalho and Mr. Maia.

On the morning of March 29th we again met at UCANORTE headquarters and heard Mr. Morgado's presentation. We also saw the facilities where UCANORTE would locate a microcomputer and met one staff person who would be involved with using the computer.

On the afternoon of March 29th we were given a tour of UCANORTE's new warehouse facility at Entrepasto. Following this we returned to Lisbon by train.

V. FINDINGS

A. Problem Definition

1. Credit Line C is totally unused. Farmers, without exception, were unaware of its existence.
2. Neither UCANORTE nor its member cooperatives feel confident that they could administer Line C if it were fully implemented unless they were assisted to do so.
3. Neither UCANORTE nor the cooperatives have experience with high-volume, multi-year credit programs.
4. Farmers and Directors of cooperatives consistently expressed support for implementation through UCANORTE should a full-scale implementation effort be made. Mutual credit cooperatives, an alternative which had been discussed, are practically non-existent in this Region.

B. Feasibility of "Microcomputer" Solution

1. The information processing task involved in the administration of Credit Line C is clearly within the capabilities of microcomputer systems.
2. Preliminary analysis (questimate!) indicates that the volume of transactions is likely to be sufficiently high as to require the use of hard, rather than floppy, disks for mass storage. The potential for a large number of administrative transactions also suggests that it will be desirable to use either a microcomputer capable of supporting multiple terminals or two or more microcomputers connected with each other through a hard disk (Corvus or equivalent).

3. Any attempt to solve the problems of implementation of Credit Line C using microcomputers at UCANORTE should include a large component for system development, applications development and training of personnel in microcomputer operations (UCANORTE) as well as credit system administration (UCANORTE and cooperatives).

C. Utility of Further Study

1. The first objective of further study should be to determine whether or not implementation of Line C as it presently exists is, or ought to be, a high priority for PROCALFER. There is little knowledge of the probable impact of implementation of Line C on limestone consumption. The present law may make credit available for the purchase of fertilizer as well as limestone; which, given that fertilizer costs are substantially higher than limestone costs and that returns to fertilizer use are achieved in the first year, is not desirable.

Assuming that implementation of Line C is a high priority, then the following questions would be the subject of further study:

2. Should Line C be implemented using UCANORTE and its member cooperatives as the intermediary/administrative institutions? The answer to this question is probably "Yes," but the question should be touched upon in further study.

3. Do UCANORTE and its member cooperatives have the minimum administrative structure and processes necessary? If not, what organizational improvements would be necessary? Are these improvements feasible? At what cost?

4. If Line C were fully implemented, what would be the volume of transactions (Applications for credit, approvals, disbursements, payment due notices, payment receipts, etc.)? Which parts of this should UCANORTE perform and which parts should be the responsibility of the cooperatives?

5. If a microcomputer(s) were part of the proposed solution, what system would be best suited to the task? A microcomputer is most probably a part of the solution, but considerable attention will have to be given to defining the best system.

VI. RECOMMENDATIONS

1. PROCALFER farmer credit policies (Line C) should be reviewed at the highest levels of the project to determine needed changes and the desirability of a concerted effort to implement them. If a decision is made to implement Line C, then that decision should be clearly articulated to all parties involved and visibly supported at the highest levels.

15

2. Assuming that Line C is to be implemented, a team of an agricultural credit expert and a management systems expert with knowledge of microcomputers should be engaged to undertake a detailed study of the problem and prepare a detailed plan for implementation of Line C. We estimate this to take about one month of the consultants' time (A total of two person months).

3. Any solution to the problems in the implementation of Credit Line C should be seen as an organizational change effort with specific and detailed attention to clear articulation of goals and objectives, setting of performance expectations, creation of administrative capacity, action-training for participants and integration/coordination with related PROCALFER/MACP activities.

VII. SUMMARY REMARKS

The effective extension of the benefits of Credit Line C to the farmers of Region I will require concerted effort from several levels and institutions of the PROCALFER project. Re-examination and re-articulation of the policies of Line C are a pre-requisite to successful implementation. Implementation will have to be supported from the top with resources; including equipment, training, technical assistance and continuing guidance. The implementation of Line C is not in any sense an "impossible" task, but given the lack of experience of those involved and the complete failure to implement this line of credit to date, it would be wise to be thorough, modest and incremental in future attempts to implement. Any plan for implementation should allow relatively extended periods for training and system development. Credit might have to be made available in carefully designed phases in order to deal with the potentially overwhelming demand for credit. Demand could overwhelm either administrative capacity or financial resources, or both.

ppn-03/02/87

I arrived 03/02/87 from Washington, D.C. That afternoon I met with the team at the Rato office. They had just finished packing to move back to the Deiras office. This was done with much reluctance, since they didn't relish driving to Deiras every day and were not looking forward to being in the same location as the Coordinating Group.

The team seems to have greatly slowed down its pace. They have decided to work from 9:30 to 5:00 or 5:30 only. On the other hand, they may in fact be better organized. They had prepared a briefing for me, which was not really detailed enough, but was a step in the right direction.

Pernell has been very supportive of the PIMS team in recent months. The team remarked on this and Pernell seems to show his regard for the team. He provided office space since September and secretarial support since the beginning. He has tentative plans to purchase 4 to 5 microcomputers for the Policy work. He has agreed to lend them one of the "PIMS" computers for their work which starts the same day as our training session. However, he is willing to rent computers for us if he can get ahold of them.

The team seems to be on an emotional "even keel." They may not be too energetic, but they do not seem to be "down." Pernell seems to have gotten over his frustration with Carlos Goncalves. He spoke well of Carlos' work today.

I talked with Victor Oliveira and Mario de Carvalho today about their interests in using the micros and participating in the training sessions. Both seemed enthusiastic and said that they would be available for the entire time that Noel will be here. There is a lot to be done to set up the micros. I will have to oversee the delivery of the rest of the equipment and software, purchase supplies, make several copies of the software, set up a disk library, etc. Anna Varela will work with me on this.

Today seemed to be productive for me. I spent a good deal of the day working with Ana Varela. We were doing a number of things relating to setting up the computers. Two computers have been delivered as have two Epson MX-100 printers and 4 disk drives. Much of the firmware is still missing, including the Z-80 cards, the Language cards, the modem interfaces and modems, the graphics tablet, the Diablo 630 printer and some smaller items. I have a meeting scheduled for Monday with Ricardo Carvalho to try to expedite this. Ana and I made several backup copies of software today. We also started a "training manual" for her. This is composed of copies of the relevant software manuals. Ana did most of the software copying today and seemed to enjoy it and catch on quickly. I mentioned the possibility of her attending the Carl Gotsch/Stanford training this summer. She would like to go, but really doesn't think that she will be able to go. She doesn't want to be away from her family that long. It seems that her family will always be a limit on her participation in the PIMS team. She will (This is just my personal impression.) be good at what she does, but will limit herself in what she takes on and will not exercise much leadership in the team.

Sao seems to have some problems within the team. The "Planning Cabinet" members (Elvira, Miguel and to a lesser extent Edite) think that Sao wants leadership, although she has denied it. Sao must be threatened by being the only non-Planning Cabinet member. I don't know how Ana feels about this. Renato has informally left the team. I haven't even seen him in the three days that I have been here. Today Sao and Edite went to Lisbon for lunch. Edite returned after 3:00 PM and Sao did not return. It has been more or less openly decided that Elvira and Miguel will only work with the team on specific identified tasks, normally in the regions.

Other than making these observations in the process notes, I do not intend to do anything about the group and interpersonal dynamics in the team. I am taking my "Budget Specialist" title seriously. I will concentrate on budgets and micros and let the team take responsibility for its own maintenance. Edite says that this is what the team expects of me. I will ask the rest of them what they are expecting as soon as an opportunity presents itself.

Rumour has it that Carlos will make some "big announcement" tomorrow. Nobody knows what it is all about, but seems to be negative for Carlos. Recent rumour also had it that he had another job offer coming in --- one that he was excited about.

ppn-03/04/83

Today's work was again concerned with logistics of installing the computer system, although I also started to think more about the upcoming training sessions and to plan all of the work of this month. I called Marcus and tried to call Noel several times. I never did get through to Noel.

The team seems very eager to learn to use the micros, which is a positive sign for the eventual success of the micro installation. On the other hand, using the micros seems to be all that they want to do. I am somewhat concerned and asked for and conducted a brief planning session today in an effort to get them to focus on some of the other work that we have to do. The session was supposed to focus on the work that I am to do while here, but it was my intent that they should see the implications for their own work. I won't know until next week whether they are indeed aware of and willing to undertake the other work. I laid out the following work areas for myself:

budgeting (with Edite)

1. Complete VisiCalc templates and learn to apply system;
2. Standardize budgeting process and assumptions;
3. Improve templates and manual in accordance with standardized process.
4. Develop plans for pilot experience in one or two zonas agrarias.

Computers (with Ana)

1. Complete purchase process
2. Make backup copies of software.
3. Develop library procedures for disks and manuals.
4. Start VisiCalc training on an informal basis with team.
5. Start DB Master training on an informal basis with Victor Oliveira;
6. Produce a phased plan for introduction of micros;

Monitoring (with Sao, Edite and Ana)

1. Decide on content of monitoring systems (material and financial?)
2. Design process
3. Suggested characteristics include:
 - a. "bilateral" - must include useful feedback to regions
 - b. include key information from present monthly regional reports
 - c. computer use is a key unknown variable at this point
 - d. may try to design a "pilot" monitoring system for one or two zonas agrarias

I will produce a final report integrating all of the above work. The team approved the above work plan, but there wasn't a lot of discussion. It was lunch time and some of them had appointments for lunch.

What happened at lunch was very interesting. Sao and Edite had lunch

ppn-03/09/83

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Carlos was approved yesterday by the Secretary of State to be the head of the PIMS team and to continue as a member of the C.G. It looks to me as if he was forced into it and had no other real choice. I can't imagine why he would have taken the demotion in status. It would obviously have been better for his career to stay as Extension's rep. I also doubt that this will be good for the SGIP effort. There is a problem with "ownership" of the video equipment and the microcomputers. They have not been formally turned over to the Portuguese. The Portuguese (Almeida Alves and Carlos) have expressed concern that some of the equipment might disappear if someone is not made "responsible" for it, but they argue, correctly I suppose, that nobody can be responsible as long as it is not clear who owns it. Another sign of the lack of trust and cooperation between the Americans and Portuguese? Black says that he will ask A.A. what his preferences are.

I have asked Sao, Edite and Ana to give me a briefing, region by region, of the current situation of the project. This is because of some rather alarming things that I have heard in passing. For example, the Secretary of State will do away with all regional coordinators. In Viseu Cardoso Domingues will leave and all of the Agrarian Zone Chiefs will be replaced. Also a statement that the SGIP team is seen as demanding too much from the regions when we are there. Too many people tied up for too long a time. We have to reduce our "profile" and our demands on regional resources. Good news! There have been some very good yield responses from demonstration fields in Aveiro. The C.G. apparently has plans to publicize this.

Neither Odette nor Pennell were at work today; so I couldn't try to find out what happened yesterday about the micros. I did talk with Jim Black, but he hadn't heard about it.

I continue to have to follow-up on the micro purchase and installation. Copying programs and manuals takes a lot of time. Also purchasing supplies---paper, boxes for the disks, surge protectors, etc. I worked this afternoon with Ana drafting an announcement of the upcoming training event to be distributed to all Oeiras staff and Elvira and Miguel. I also worked with Edite. She is starting the document about regional monitoring activities.

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Edite, Sao and I had a meeting this morning with Elvira and Miguel at the Planning Cabinet. There were a couple of items on the agenda. One was to work out how Elvira and Miguel will participate in the SGIF work in the regions. Another agenda item was to begin the process of standardizing the cost and budgeting process. A third item was an explanation by Elvira and Miguel of the work plan which they have developed for themselves as members of the Planning Cabinet, but which has overlap with and implications for the SGIF work. Elvira and Miguel will only work with the team when we are actually in the regions, but they will be fulltime during that time. They said that they have marked out those weeks on their calendars and will be with the team. It was decided that Edite will draft a list of items connected with the costing and budgeting process that should be standardized along with suggested standards. This will be distributed and then discussed at a meeting on March 17th. Elvira will get some written suggestions to us soon about some new forms that they want to use and some new forms that DCP recently started requiring. These will also be discussed at the March 17th meeting.

When we arrived in Beiras after lunch Maria and Ana were very upset because Odette Carvalho had accused them of monopolizing the computers and had been quite rude to them. Odette said that she would see that Dr. Pennell took care of the matter. We may have to start posting a sign-up sheet. Competition for the computer may be a good sign, but it should be handled fairly and openly. Odette has actually had a great deal of time on the machine.

INTRODUÇÃO A UTILIZAÇÃO DOS MICROCOMPUTADORES

O software dos microcomputadores APPLE II, recentemente instalados, compreende um conjunto de programas utilitários com aplicação em diversos domínios.

Tendo em vista uma boa utilização e aplicação destes programas apresentamos uma lista dos mesmos e uma descrição sumária das suas capacidades:

- APPLE WRITER II - Sistema de tratamento de texto que permite a introdução e armazenamento do original em memória de modo a facilitar eventuais correcções e/ou alterações, assim como a saída de uma ou mais cópias com o formato pretendido.
- VISICALC - Sistema de gestão e planificação orientado para a saída de dados em forma de quadros com possibilidades de calculo algébrico, auxiliado por um conjunto de funções matemáticas. Permite ainda a execução de funções condicionais (IF ... THEN ...).
- D.B. MASTER - Sistema de criação, actualização e utilização de ficheiros de dados com acesso aos registos quer sequencialmente quer por meio de chaves.
- VISIFILE
GOODSPELL
VISITREND/VISIPILOT
APPLE PROJECT MANAGER
STEPWISE MULTIPLE REGRESSION
- } Programas a desenvolver noutra acção de formação.

Reliazar-se-ã de 18 a 25 deste mês sessões de formação em microcomputadores, cujo programa é o que se segue:

- Dia 18 - Formação em Processamento de Palavras utilizando o programa utilitário APPLE WRITER II.
- Dia 21 - Introdução ao uso e manutenção dos Micros.
- Dia 22 - Manhã - Formação em Visicalc
Tarde - Formação em D.B. Master
- Dia 23 - ● Prática em Processamento de Palavras
● Sessão de trabalho com os Especialistas de Gestão para discussão do processo de acompanhamento e ciclo orçamental.
● Introdução aos programas utilitários que possibilitam a análise estatística de dados.
- Dia 24 - Manhã - Formação em Visicalc.
Tarde - Formação em D.B. Master.
- Dia 25 - Manhã - Formação em Visicalc
Tarde - Formação em D.B. Master.

(PART TRANSLATION FROM PROCALFER
ENGLISH; PART SYNTHESIS
OF OTHER MATERIALS)

Processamento de Palavras

Março de 1983

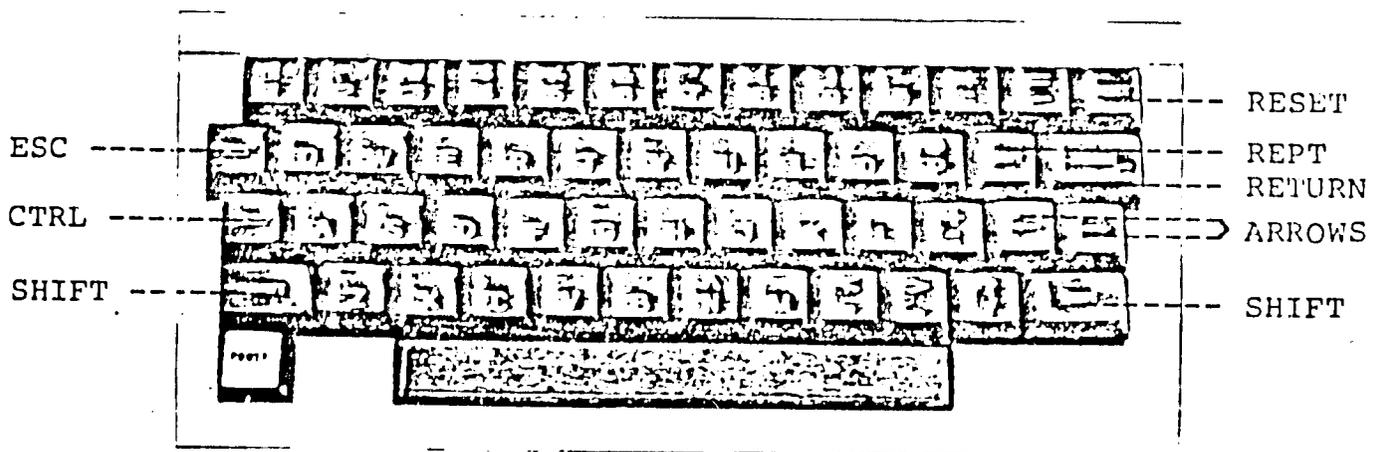
COMPONENTES DO SISTEMA

O Sistema é constituído por um computador APPLE II EUROPLUS, um monitor e um ou dois disk drives. Os disk drives são numerados de 1 e 2 e o sistema utiliza sempre o número 1, excepto quando está comandado para o número 2.

Os botões "ON/OFF" estão localizados na parte de trás do APPLE II no canto inferior esquerdo. No canto inferior direito da parte de trás do monitor, na ranhura "video in", devemos ligar o cabo (cinzento) das 80 colunas. Para ligar e desligar o monitor devemos utilizar o botão "ON/OFF", situado na face do mesmo no seu canto inferior direito. Ao lado deste encontramos o botão de contraste, utilizado para regular a qualidade da imagem no ecran.

Teclado

O teclado assemelha-se ao de uma máquina de escrever, à excepção de algumas teclas que se identificam na figura.



Faz também parte do sistema um teclado adicional, o teclado numérico, que facilita a entrada de números ou a realização de operações numéricas.

Impressora

EPSON -- MX-100 III - Imprime 100 CPS (Caracteres por segundo).

Programa Utilizado

O programa utilizado é o APPLE WRITER II, que deve ser inserido no disk drive antes do sistema ser ligado. (Para esclarecimento de dúvidas, em relação às funções, deve ser consultado o manual respectivo).

Diskette de Trabalho

Todos os documentos criados são gravados numa diskette de trabalho que deve ser o "armazém" permanente para documentos.

PREPARAR O SISTEMA PARA FUNCIONAMENTO

1. Colocar a diskette contendo o programa - APPLE WRITER II - no disk drive 1, tendo em atenção que a etiqueta deve ficar para cima.
2. Colocar o botão "ON/OFF" na posição ON.
3. Quando o programa tiver passado para a memória do computador, devemos substituir a diskette contendo o programa pela diskette de trabalho.

ELABORAR UM DOCUMENTO

1. Ao criar um documento, devemos começar sempre com o écran limpo (CTRL-N).
2. Uma vez o écran limpo, podemos começar a dactilografar o documento e utilizar as diferentes funções que o programa nos oferece. A linha de orientação, constante no topo do écran, indica ao operador qual a sua posição relativamente ao documento que está a dactilografar.

GUARDAR UM DOCUMENTO

1. Carregar nas teclas CTRL e S simultaneamente.
2. Seguidamente, dactilografar o nome que identificará o documento, e que:
 - Não deve conter mais de 30 caracteres;
 - Não deve começar por um número mas sim por uma letra;
 - Não pode conter vírgulas.
3. Por último, carregar na tecla RETURN. Neste momento, acende-se a luz vermelha IN USE do disk drive que está a ser utilizado, e que nos dá a indicação de que o documento está a ser guardado na diskette de trabalho. (Enquanto esta luz estiver acesa, nenhuma tecla deve ser carregada, pois pode destruir o conteúdo do documento). Quando a luz se apagar temos a indicação de que o documento está totalmente guardado.

CHAMAR UM DOCUMENTO, GUARDADO NUMA DISKETTE, À MEMÓRIA DO COMPUTADOR

1. Carregar na tecla CTRL e L simultaneamente.
2. Dactilografar o nome sob o qual está guardado o documento.
3. Carregar na tecla RETURN. Neste momento, a luz vermelha IN USE do disk drive que está a ser utilizado acende-se, dando-nos a indicação de que o documento está a passar para a memória do computador. Quando a luz se apagar temos a indicação de que o texto passou na totalidade para a memória do computador (sem ficar desgravado da diskette).

IMPRIMIR UM DOCUMENTO

1. Ligar a impressora e certificar-se de que a mesma tem papel.
2. Carregar na tecla CTRL e P simultaneamente.
3. Dactilografar ?, e carregar na tecla RETURN. Obter-se-a, seguidamente, a lista relativa aos comandos de impressão, que podem ser por nos alterados, consoante o formato que quisermos dar ao documento.
4. Uma vez escolhidos os formatos, fazemos entrar a opção NP (carregando nas teclas N e P), se se tratar de uma nova impressão, ou a opção CP (carregando nas teclas C e P), se se tratar de continuar a imprimir um documento.

PRINCIPAIS FUNÇÕES DO APPLE WRITER II
LISTA RESUMO

O MENU

(Comandos mais frequentemente utilizados. Os [] significa que é necessário a utilização da tecla CTRL)

- [L] LOAD A FILE - Trazer à memória do computador um documento (Ficheiro) guardado na diskette.
- [S] SAVE A FILE - Guardar um documento (Ficheiro) na diskette.
- [N] ERASE MEMORY - Apagar tudo o que estiver na memória do computador.
- [O] ACCEPT DOS COMMANDS - Aceita comandos DOS - Disk Operating System. Comandos directamente relacionados sistema de operação das diskettes.
- [P] PRINT PROGRAM COMMANDS - Comandos relativos à impressão dum documento. Estes comandos podem ser alterados consoante o formato a dar ao documento.
- [Q] ADDITIONAL FUNCTIONS MENU - Funções adicionais ao Menu.

NOTA: Para regressar ao Menu carregar nas teclas

ESC ESC ?

MAIÚSCULAS: Carregar na tecla ESC uma vez e depois na tecla desejada.

PARA APAGAR QUALQUER CHARACTER ENTRADO, utiliza-se o ARROW (←) da esquerda. Para inserir o mesmo character apagado, sem ter de o redactilografar, utiliza-se o ARROW (→) da direita.

MOVER O CURSOR DENTRO DO TEXTO: Carregar 2 vezes na tecla ESC. O CURSOR conterá o sinal "©", indicativo de que se pode mover, utilizando uma das seguintes teclas:

<u>Carregar</u>	<u>Movimento do CURSOR</u>
I	1 linha acima
J	1 character à esquerda
K	1 character à direita
M	1 linha abaixo
E	12 linhas acima
S	24 caracteres à esquerda ou até ao próximo espaço
D	24 caracteres à direita ou até ao próximo espaço
X	12 linhas abaixo.

27

A tecla CTRL (Control) é sempre utilizada com outra tecla (letra), cuja inicial, geralmente, prefixa a função a utilizar. Para anular qualquer comando CTRL, sem ter feito nenhuma entrada, carrega-se no RETURN ou noyamente no comando escolhido.

CTRL-B(beginning) - Este comando leva o CURSOR para o princípio do texto.

CTRL-E(end) - O CURSOR irá para o fim do texto.

CTRL-K - Este comando modifica o "E" da DATA LINE em "U", indicando que a partir daquele momento tudo o que dactilografarmos aparecerá em maiúsculas.

CTRL-C Automatic Case Change - Modifica, automaticamente, de minúsculas para maiúsculas, palavras, linhas ou parágrafos já entrados. Colocamos o CURSOR próximo do que queremos modificar e carrega-se no CTRL-C, utilizando, seguidamente, as teclas "J", "K", "S" ou "D", afim de mover o CURSOR através do texto.

CTRL-Z - Este comando faz a divisão das palavras na margem direita automaticamente. O "Z" aparece na DATA LINE dando-nos essa indicação.

CTRL-S

- [S] Filename,D* - Guarda o conteúdo completo de documentos, que esteja na memória, na diskette que se encontra no drive*.
- [S] ? - Dá-nos o catálogo dos documentos já guardados na diskette.
- [S] = - Guarda o conteúdo completo de textos que estejam na memória, na diskette, sob o nome que se apresente na DATA LINE.
- [S] Filename,D2/Marker/ - Guarda segmentos de texto na diskette, desde a posição do CURSOR, até e incluindo a marca.
- [S] Filename,D2+ - Adiciona texto, que esteja na memória, ao fim de um texto já guardado na diskette.

NOTA: Todos estes comandos devem ser seguidos dum RETURN.

CTRL-L

- [L] Filename,D* - Trás à memória o conteúdo completo dum texto guardado sob determinado nome, na diskette situada no drive*.
- [L] ?,D* - Dá-nos o catálogo dos textos guardados na diskette, que se encontra no drive*.
- [L] = - Trás à memória o texto guardado na diskette, sob o nome que se encontra na DATA LINE.
- [L] Filename,D* /marker1/marker2/ - Trás à memória segmentos de texto guardado na diskette, começados pela marca 1 e acabados na marca 2, inclusivê.
- [L] Filename,D* /marker/ - Trás à memória texto guardado na diskette, começado pela marca.
- [L] Filename,D* //marker/ - Trás à memória texto guardado na diskette, desde o seu início até acabar com a marca.
- [L] Filename,D* /marker1/marker2/A - Trás à memória todos os casos de segmentos de texto, guardados na diskette, incluindo as marcas.
- [L] Filename,D* /marker1/marker2/N - Trás à memória o primeiro caso de segmentos de texto, excluindo as marcas.

- [L] /marker1/ - Copia segmentos de texto, que se encontram na memória, para a posição actual do CURSOR.
- [L] Marker2/ - Trás ao écran um texto sem o guardar na memória.
- [L] Filename,D_a - Trás ao écran um texto sem o guardar na memória.

NOTA: Todos os comandos LOAD devem ser seguidos dum RETURN e serão inseridos a partir da posição actual do CURSOR sem apagar o texto já existente na memória.

CTRL-T Tab(Set/Clear/Purge) - Tabulador

Movemos o CURSOR até que a DATA LINE nos indique, na posição o número desejado e depois carregamos no CTRL-T, seguido de S (S=Set - Fixar). Para apagar esta posição: CTRL-T, seguido de C (C=Clear - Apagar só aquela posição). CTRL-T, seguido de P (P=Apagar todas as posições já definidas).

CTRL-I - Leva o CURSOR, automaticamente, até à próxima posição de tabulador, e assim de posição em posição.

CTRL-W - Este comando serve para apagar palavras. Coloca-se o CURSOR na primeira letra da palavra que queremos apagar. Acciona-se o CTRL-W e a palavra e o espaço precedente a este desaparecem da memória.

CTRL-X - Este comando apaga parágrafos completos ou até encontrar um RETURN. Coloca-se o CURSOR à direita da última palavra do parágrafo e acciona-se o CTRL-X e o parágrafo ou todos os caracteres até ao RETURN desaparecem.

CTRL-R(eplace) - Substituir uma palavra ou palavras sem ter de as apagar. Quando a DATA LINE aparece um "R", indicativo de que estamos na presença deste comando. Coloca-se o CURSOR em frente da palavra ou palavras que desejamos substituir e fazemos a entrada. A substituição é feita.

CTRL-F(ind) - Procura, no texto em memória, palavras ou frases a partir da posição do CURSOR na direcção da ARROW (← ou →) da DATA LINE.

[F]/text to find/ - Procura no texto em memória a palavra ou palavras que desejamos substituir até à sua primeira ocorrência. Para continuar a procura carregar no R.

[F]/text to find/
replacement/ - Procura no texto em memória a palavra ou palavras que desejamos substituir, até à sua primeira ocorrência. Seguidamente, carrega-se no "Y" e a substituição é feita. Para continuar, carregar no RETURN.

[F]/text to find/
replacement/A - Procura e substitui todas as ocorrências das palavras ou palavras que desejamos substituir.

[F]/text to
delete// - Procura no texto em memória até à primeira ocorrência da palavra ou palavras a apagar. Seguidamente, carrega-se no "Y" e a palavra ou palavras são apagadas. Para continuar carrega-se no RETURN.

[F]= - Repete a última instrução relativa a este comando.

- CTRL-G (lossary) - Define os termos dum glossário utilizando o CTRL-G, seguido dum "?" e duma letra ou número que irá preceder a palavra ou palavras a definir.
- [G]? Character Text - Define os termos do glossário que podem ser inseridos no texto utilizando CTRL-G (letra ou número) que precede o termo.
- [G] Character - Insere, na posição actual do CURSOR, os termos definidos, utilizando o CTRL-G (palavra ou números) que precedem.
- [G]* - Apaga todos os termos do glossário que estejam na memória.

CTRL-Y - Permite-nos ver, ao mesmo tempo, 12 linhas do mesmo texto no écran, podendo, uma delas, aceitar entradas ou modificações.

CTRL-V - Funciona não como comando, mas sim como uma entrada no texto, cujo propósito é controlar, por exemplo, caracteres da impressão (notas do fim da folha, etc.).

CTRL-F (rint) -

[P] ? P (rint/Program Commands-Display) - Este comando dá-nos a lista dos comandos de impressão, que podem ser por nós alterados, consoante o formato a dar ao documento.

[P] NP (New Print) - Imprime o texto que esteja na memória.

[P] CP (Continue Print) - Continua a imprimir o mesmo texto depois de uma paragem na impressão, para introdução de alterações.

SISTEMA DE ACOMPANHAMENTO PARA O PROJECTO

1. OBJECTIVOS DO ACOMPANHAMENTO

O acompanhamento é uma função fundamental no sistema integrado de planeamento e gestão, e cujos objectivos são:

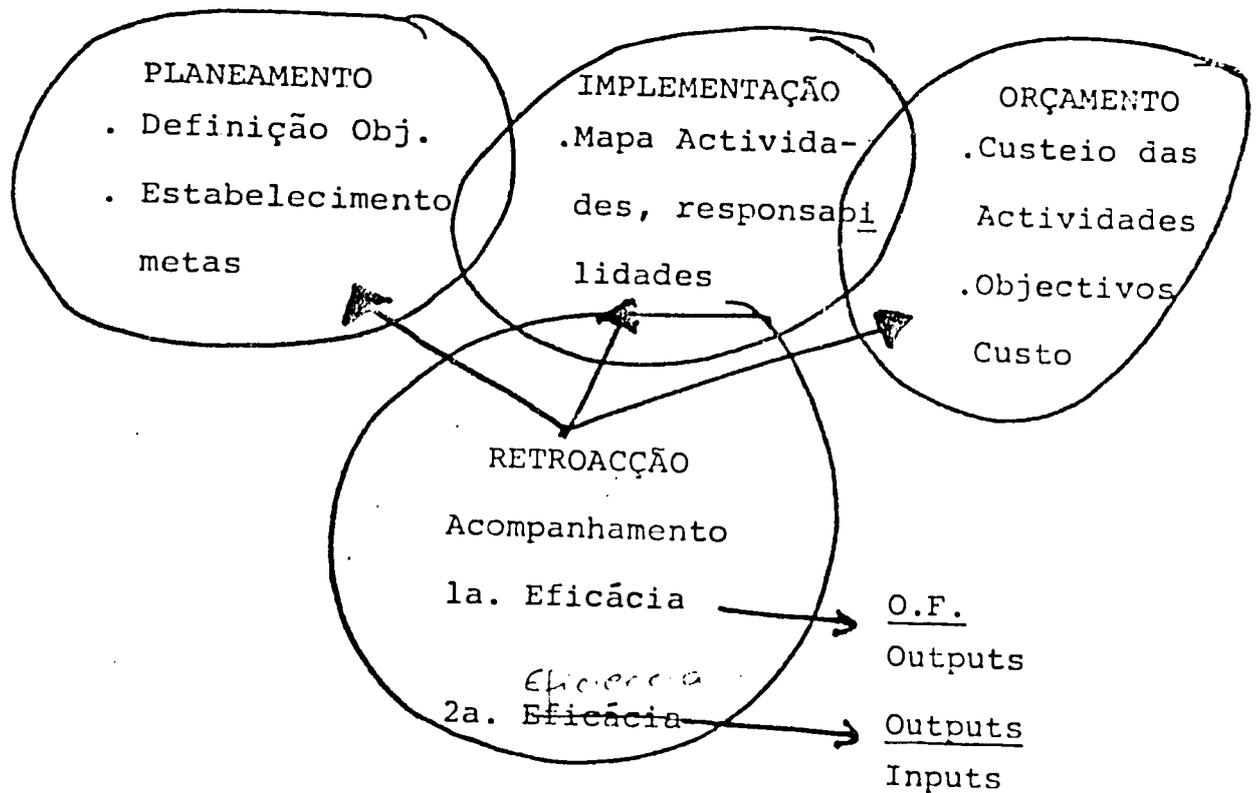
- . Aumentar a eficiência do planeamento
- . Instalar um sistema contínuo de recolha de informação sobre a execução das actividades-chaves do projecto de forma a poder influenciar o funcionamento do projecto.
- . Dar respostas a questões tais como:
 - são os planos realistas?
 - são os recursos disponíveis suficientes para cumprir o plano inicial?
 - face ao nível de realização atingida é necessário fazer ajustes?
 - Com base nos resultados atingidos foram as despesas razoáveis?

As respostas a tais perguntas revelam-se de extrema importância dado o estágio inicial de desenvolvimento do processo pois permitirão, eventualmente, permitir acções correctivas.

A informação recolhida durante o acompanhamento permite estabelecer vários indicadores, nomeadamente de eficácia e eficiência, que devem justificar a tomada de decisões não só na fase de planeamento como na implementação e ^{sua} ~~na~~ correspondentes orçamentais.

Pretende-se pois, ^{através do acompanhamento} relatar a alguém o que se atingiu no projecto e como foi atingido.

O sistema de acompanhamento visa ^{pois,} estabelecer uma ponte, entre as várias fases, através dum processo de retroacção, conforme graficamente se pode observar.



2. Componentes do sistema de acompanhamento

2.1 Material → a incluir

2.2 Financeira

A tentativa de introduzir esta componente na actual estrutura orçamental das regiões, comporta vários riscos. Neste sentido, é importante explicitar quais os resultados específicos, que nesta 1a. fase (1983) queremos atingir e que são:

- ⊙ Criar sensibilidade e alguma capacidade técnica a nível regional e central, para a instalação desta componente.
- ⊙ Objectivar a responsabilidade financeira em relação à utilização dos fundos do PROCALFER.

Nesta fase a "gestão financeira" tem um caracter muito restrito pois deverá/limitar-se a garantir a aplicação das verbas no âmbito do PROCALFER (responsabilidade financeira).

Numa fase posterior a informação financeira recolhida, nomeadamente, através dos valores dos indicadores de eficiencia deverá constituir uma base para justificar as estratégias a adaptar.

A introdução desta componente tem como pressuposto básico o apoio explicito do G.Coordenador, Coordenadores Regionais e Direcção de Serviços Administrativos.

PLANO PARA A COMPONENTE FINANCEIRA

Esta componente deverá estar interligada com o acompanhamento material de forma a permitir uma visão integrada da implementação do Projecto.

Focando a atenção na informação que nós precisamos e, que esta deverá estar disponível no momento exacto é importante definirmos:

- . O que precisamos saber
- . Como encontrar a informação
- . Quando devemos ter essa informação
- . Quem é responsável por essa informação.

FREQUÊNCIA DO ACOMPANHAMENTO

Este deverá ocorrer ³duas vezes no ano respectivamente no fim do 1º e 2º semestres ^{3º e 4º trimestre}. As razões fundamentais para que optemos pelo acompanhamento ~~semestral~~/trimestral são:

. O ano agrícola esta claramente dividido em 2 épocas - Primavera/Verão e Outono/Inverno.

. Os objectivos referidos no ponto 1.2 em que visamos instalar o sistema.

• Alinazo na libertação das áreas do F. D. B. A. (Referir o acompanhamento coincidente com as idas da Equipa às Regiões).

PROCESSOS A USAR

- Deverã tentar institucionalizar um processo bilateral de troca de informação entre organismos Centrais (G.C., Equipa SGIP, G. Planeamento) e Regiões de forma a criar uma nova dinâmica.

De forma a concretizar este processo as regiões deveriam elaborar os seus relatórios por escrito (Anexo 1) (material e financeiro) que enviariam para a Equipa Central até ao dia x. Entre o dia x e y estes deveriam ser analisados pelo G.C. e Equipa Central ~~em que~~ seriam identificadas algumas áreas prioritárias.

Quando das deslocações às regiões a Equipa elaboraira um relatório com sugestões concretas que o G.C. enviaria às Regiões.

QUADROS A PREENCHER

Comentários.

ANEXO 1 — ACOMPANHAMENTO MATERIAL

2 — " FINANCEIRO — J

51

DATA BASE MANAGEMENT PRESENTATION
BY NOEL

An Introduction to Data Base Management

and

the Concept of a Management Information System

OBJECTIVES:

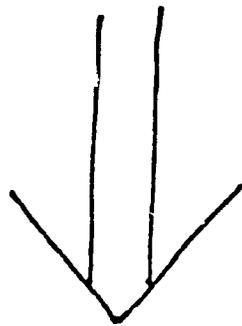
1. Understand the difference of relationships bet
file, data base, information, MIS, and decisic
2. Understand levels of information need and the
an organization.
3. How to determine your own D.B. needs.
4. How to set-up a D.B. form design.
5. The basics of a MIS for yourself.

BASIC DECISION PROCESS:

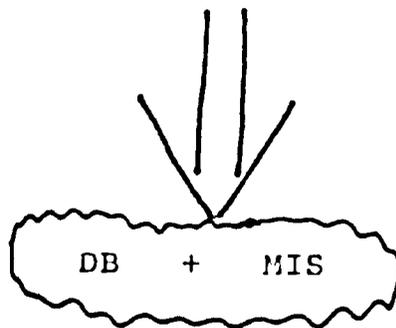
I What is the problem or the objective?

II What are the alternatives?

III Which alternative is the best?



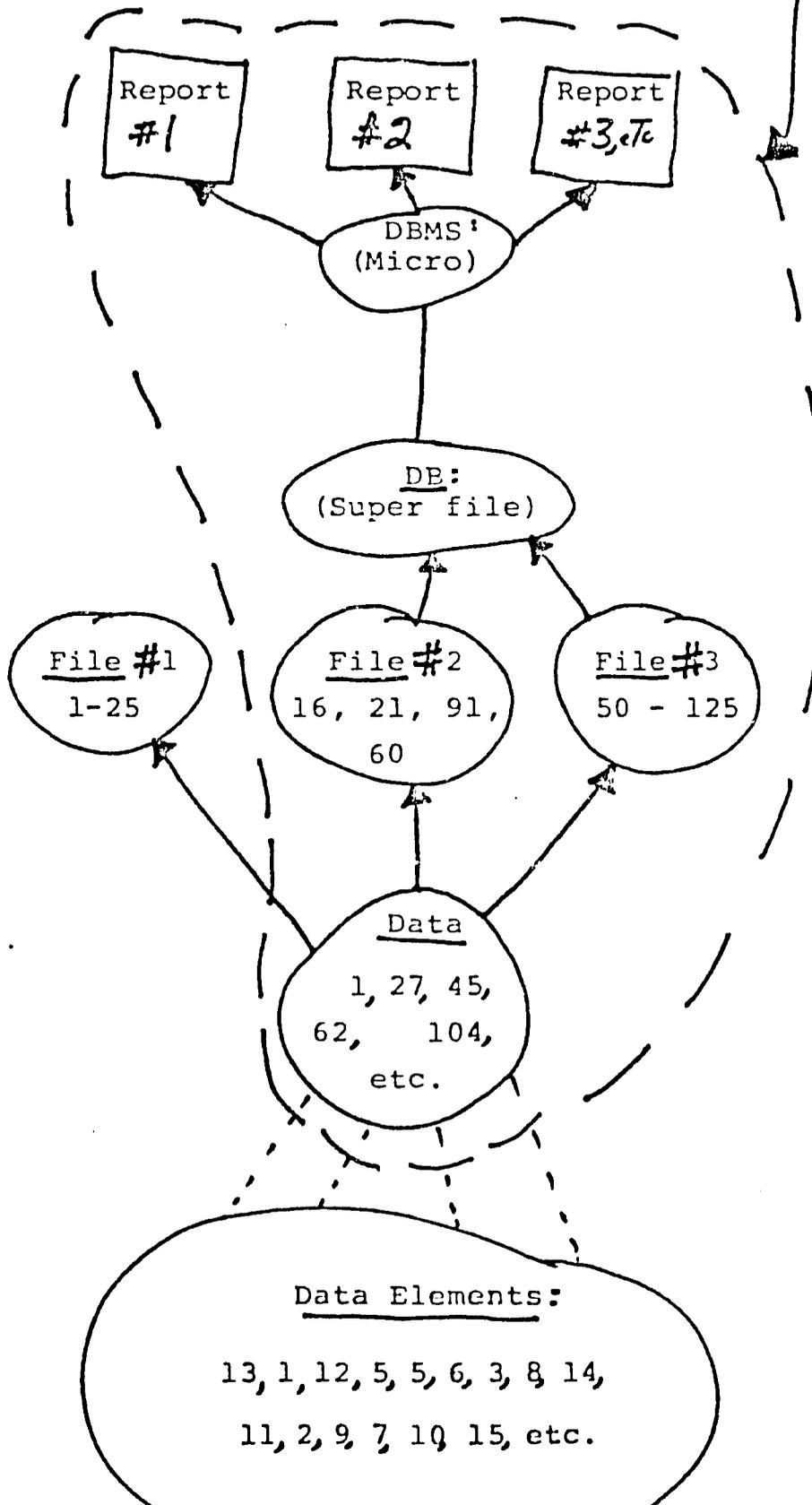
Requires the gathering,
analysis and choice of
action for resolution/
achievement



SOME DEFINITIONS

- 1) DATA - A representation of fact or fiction suitable for communication, etc. by human/non human.
- 2) FILE - Collection of related data elements in records.
- 3) DATA BASE - A super file that consolidates and integrates files.
- 4) DBMS - Generalized systems that creates, maintains and processes DB's for some organizational entity.
- ★ 5) MIS - Any system that provides data processed into information to support management decision making.

WHAT IS MIS?!



This
Process
(data collection to Reports with the necessary information for decision-making)
IS
A
MIS...

EXAMPLES OF DB & NEED FOR "COMPUTING"

DB LOCATION	MANUAL/ CALCULATOR	MICRO- COMPUTER
Internal	<ul style="list-style-type: none"> ● Simple prediction Models ● Break-even Analysis 	<ul style="list-style-type: none"> ● Project Scheduling ● Inventory ● Financial Analysis ● Soil/crop experimental Design
External	<ul style="list-style-type: none"> ● Marginal Analysis ● Incremental Analysis 	<ul style="list-style-type: none"> ● Long-term Planning ● Climate impact on crops ● Economic Feasibility

DIFFERENCES IN INFORMATION NEEDS AT THE THREE LEVELS
OF INFORMATION

Nature of Info	Level: Operational	Management	Strategic * Planning
• Question asked	• What is? (description)	• What was, is & will be?	• What will be? • What if
• Time Frame	• Current (What is happening today? This week?)	• Past & Current	• Future (1-5 years)
• Info environment	• Mostly Internal/Current • Resources • Utilization	• Some internal • Some external • Past and current performance • Prediction future Information	• Highly dependent on external information

INFORMATION NEEDS

TYPE OF INFO	LEVEL: OPERATIONS	MANAGEMENT	STRATEGIC
<ul style="list-style-type: none"> ● Accounting 	<ul style="list-style-type: none"> ● A/R ● Expenses ● Allocations 	<ul style="list-style-type: none"> ● Budget Rpts ● Rpts on discrepancies & Exceptions 	<ul style="list-style-type: none"> ● Budget Projections
<ul style="list-style-type: none"> ● Project 	<ul style="list-style-type: none"> ● Activity STATUS ● Resource Needs/USED ● Scheduling 	<ul style="list-style-type: none"> ● MBE 	<ul style="list-style-type: none"> ● Impact Evaluation ● Replication Analysis
<ul style="list-style-type: none"> ● Personnel 	<ul style="list-style-type: none"> ● Salaries ● Longivity ● Address ● Location 	<ul style="list-style-type: none"> ● Union negotiation ● Job STATUS ● Training Needs 	<ul style="list-style-type: none"> ● Manpower Projection ● Resource Allocation
<ul style="list-style-type: none"> ● R & D* (an example) 	<ul style="list-style-type: none"> ● Crops Planted ● Inputs used ● Maintenance schedule 	<ul style="list-style-type: none"> ● MBE 	<ul style="list-style-type: none"> ● STATISTICAL analysis of Results ● Redesign

* Project equivalent

FORM I

DETERMINING YOUR DB NEEDS AND MIS

1. What are you trying to do? (Your objective)
2. What are its major components?
3. What information do you need to know what is happening?
4. What data elements make-up this information?
5. Where is the data and how is it collected?
6. Who collects it?
7. Is it valid and reliable?
8. Are there any problems in getting the data? What?
9. How can the problem be overcome? Who can do it?

DESIGNING A DB

1. Make a list of the data elements.
2. Determine the easiest sequence of collecting or entering the data.
3. For each data element:
 - a) name it?
 - b) determine its length (Max)
 - c) determine the type of input (\$, s, letters, etc.)
 - d) can it be coded?
4. Create a form lay-out for summarizing this data.

Lisbon,
March 23, 1983

Dr. Glen Purnell, Team Leader
USDA/OICD/L
PROCALFER
Oeiras

Glen,

Three of the Regional Management Specialists are missing from the microcomputer workshop, because they are attending other PROCALFER training sessions. Armindo Rios (Entre Douro e Minho) and Julieta Paradinha (Algarve) are attending the "Policy" class. João Costa (Beira Interior) is either in the "Training" course or the "Credit" course. This is the second time that João Costa has missed a "Management" activity because it conflicted with a "Training" activity.

It is essential that the Management Specialists attend these sessions if we want to have successful, vertically integrated use of microcomputers in PROCALFER. Consider the following:

- (1) These people have been designated as full-time PROCALFER Management Specialists.
- (2) In addition to training, we expected to develop additional regional applications in these sessions. It makes no sense for us to attempt to develop regional applications with the two Management Specialists who are present.
- (3) Our strategy for extension of the microcomputer system/information system to the regional level depends upon first demonstrating their utility at the regional level through well-developed applications.
- (4) A central level, one-tier microcomputer system would be very limited since in many potential applications it would depend on input from the regions.

The problem of conflicting training opportunities for PROCALFER participants will probably get worse as training activities increase. I hope that we can do something about it before it gets worse. Central coordination of training invitations and scheduling, as well as well-defined criteria for participants in each course, are among the measures that might improve this situation.

Regards,
Ed Connerley

ppn-03/02/83

I arrived 03/02/83 from Washington, D.C. That afternoon I met with the team at the Rato office. They had just finished packing to move back to the Deiras office. This was done with much reluctance, since they didn't relish driving to Deiras every day and were not looking forward to being in the same location as the Coordinating Group.

The team seems to have greatly slowed down its pace. They have decided to work from 9:30 to 5:00 or 5:30 only. On the other hand, they may in fact be better organized. They had prepared a briefing for me, which was not really detailed enough, but was a step in the right direction.

Fernell has been very supportive of the PIMS team in recent months. The team remarked on this and Fernell seems to show his regard for the team. He provided office space since September and secretarial support since the beginning. He has tentative plans to purchase 4 to 5 microcomputers for the Policy work. He has agreed to lend them one of the "PIMS" computers for their work which starts the same day as our training session. However, he is willing to rent computers for us if he can get ahold of them.

The team seems to be on an emotional "even keel." They may not be too energetic, but they do not seem to be "down." Fernell seems to have gotten over his frustration with Carlos Goncalves. He spoke well of Carlos' work today.

I talked with Victor Oliveira and Mario de Carvalho today about their interests in using the micros and participating in the training sessions. Both seemed enthusiastic and said that they would be available for the entire time that Noel will be here. There is a lot to be done to set up the micros. I will have to oversee the delivery of the rest of the equipment and software, purchase supplies, make several copies of the software, set up a disk library, etc. Anna Varela will work with me on this.

procalfer process notes - 03/03/83

Today seemed to be productive for me. I spent a good deal of the day working with Ana Varela. We were doing a number of things relating to setting up the computers. Two computers have been delivered as have two Epson MX-100 printers and 4 disk drives. Much of the firmware is still missing, including the Z-80 cards, the Language cards, the modem interfaces and modems, the graphics tablet, the Diablo 630 printer and some smaller items. I have a meeting scheduled for Monday with Ricardo Carvalho to try to expedite this. Ana and I made several backup copies of software today. We also started a "training manual" for her. This is composed of copies of the relevant software manuals. Ana did most of the software copying today and seemed to enjoy it and catch on quickly. I mentioned the possibility of her attending the Carl Gotsch/Stanford training this summer. She would like to go, but really doesn't think that she will be able to go. She doesn't want to be away from her family that long. It seems that her family will always be a limit on her participation in the FIMS team. She will (This is just my personal impression.) be good at what she does, but will limit herself in what she takes on and will not exercise much leadership in the team.

Sao seems to have some problems within the team. The "Planning Cabinet" members (Elvira, Miguel and to a lesser extent Edite) think that Sao wants leadership, although she has denied it. Sao must be threatened by being the only non-Planning Cabinet member. I don't know how Ana feels about this. Renato has informally left the team. I haven't even seen him in the three days that I have been here. Today Sao and Edite went to Lisbon for lunch. Edite returned after 2:00 PM and Sao did not return. It has been more or less openly decided that Elvira and Miguel will only work with the team on specific identified tasks, normally in the regions.

Other than making these observations in the process notes, I do not intend to do anything about the group and interpersonal dynamics in the team. I am taking my "Budget Specialist" title seriously. I will concentrate on budgets and micros and let the team take responsibility for its own maintenance. Edite says that this is what the team expects of me. I will ask the rest of them what they are expecting as soon as an opportunity presents itself.

Rumour has it that Carlos will make some "big announcement" tomorrow. Nobody knows what it is all about, but seems to be negative for Carlos. Recent rumour also had it that he had another job offer coming in --- one that he was excited about.

ppn-03/04/83

Today's work was again concerned with logistics of installing the computer system, although I also started to think more about the upcoming training sessions and to plan all of the work of this month. I called Marcus and tried to call Noel several times. I never did get through to Noel.

The team seems very eager to learn to use the micros, which is a positive sign for the eventual success of the micro installation. On the other hand, using the micros seems to be all that they want to do. I am somewhat concerned and asked for and conducted a brief planning session today in an effort to get them to focus on some of the other work that we have to do. The session was supposed to focus on the work that I am to do while here, but it was my intent that they should see the implications for their own work. I won't know until next week whether they are indeed aware of and willing to undertake the other work. I laid out the following work areas for myself:

budgeting (with Edice)

1. Complete VisiCalc templates and learn to apply system;
2. Standardize budgeting process and assumptions;
3. Improve templates and manual in accordance with standardized process.
4. Develop plans for pilot experience in one or two zonas agrarias.

Computers (with Ana)

1. Complete purchase process
2. Make backup copies of software.
3. Develop library procedures for disks and manuals.
4. Start VisiCalc training on an informal basis with team.
5. Start DB Master training on an informal basis with Victor Oliveira;
6. Produce a phased plan for introduction of micros;

Monitoring (with Sao, Edite and Ana)

1. Decide on content of monitoring systems (material and financial?)
2. Design process
3. Suggested characteristics include:
 - a. "bilateral" - must include useful feedback to regions
 - b. include key information from present monthly regional reports
 - c. computer use is a key unknown variable at this point
 - d. may try to design a "pilot" monitoring system for one or two zonas agrarias

I will produce a final report integrating all of the above work. The team approved the above work plan, but there wasn't a lot of discussion. It was lunch time and some of them had appointments for lunch.

What happened at lunch was very interesting. Sao and Edite had lunch

with Carlos and the woman who represents Forestry in the coordinating group. Ana and I were not allowed to attend. I was told to have lunch somewhere else and I believe that Ana was told the same thing because of her "non-official" status in the team. Carlos had been meeting with the C. G. all morning and allegedly had big news for the team. Carlos later told me that the C.G. had decided to recommend to the Secretary of State that he be appointed as the official representative of the PIMS team to the C.G. Carlos said that Almeida Alves had expressed complete confidence in his work. Carlos felt very good about the session and the recommendation to the Secretary of State. The recommendation will be made at a meeting which is to occur next tuesday.

It was interesting, and perhaps positive, that I was excluded from the luncheon discussion. Is this "boundary maintenance" by the Portuguese? Is this something that they are doing because of their work with Cooley? I wish that I knew more about what Cooley did in this respect. I am worried about the apparent exclusion of Ana. Has the PIMS team agreed to honor the C.G.'s definition of who are official and non-official members of the team? I have to find out more about this.

Almeida Alves has not had time to see me. I tried to schedule a meeting with him on friday. He couldn't see me then and won't guarantee that he will have time on monday. The C.G. has the meeting with the Secretary of State on tuesday and he claims to be tied up in preparations. I didn't ask to see him last wednesday or thursday because I wanted to talk with the team first. This may have been a mistake. I seem to be feeling frustrated that we either have to go ahead with our work without Almeida Alves approval and involvement or we have to wait to get his input. Am I running on an "American" clock?

This is monday. My big events for the day were a meeting with Almeida Alves and a meeting with Ricardo Carvalho of APAL. My meeting with Almeida Alves was in part courtesey, but I also wanted to get his agreement to an executive briefing about the micros for the C.G. He was quite courteous and thought the executive briefing was a good idea. We scheduled it for thursday afternoon, March 17th. I also presented to him the general areas of my work during this trip---budgeting, microcomputers and monitoring. He made no specific comments, but seemed to accept these as proposed work areas. He seemed most interested in finding out from me whether or not "the Americans" still supported Carlos Goncalves as leader of the FIMS team. I said that I felt that this was a matter for the Portuguese to decide, but I felt that basically the Americans still supported Carlos and that specifically I knew that Marcus did. He tried to involve me in a discussion of the differences between Sao, Edite and Carlos, but I said that I didn't really know much about it. Carlos seems to feel that he has Almeida Alves full support and he is so wrong!

My meeting with Ricardo Carvalho was to try to resolve some problems with equipment delivery. He promised that everything, except the letter quality printer, would be in our hands by March 19th. He delivered two language cards to me "on the spot." I have to talk to Jim Black about substituting an Apple printer for the Rank/xerox that we ordered and about taking a credit for the printer cables and interfaces that are not necessary because we have three spool buffers. Also, we should order some desktop disk boxes from APAL.

Team process continues to interest me. There is very little of the feeling of being part of a team. It is interesting to speculate as to why that is. In part it is because we are not in a Region and have not done an extended regional visit for quite some time. There are very few opportunities to be together as intensely as we were in the Regions. We tend to be more a normal work group than a team at the moment. The lack of team spirit may also be attributed to the relatively rapid change in team membership and status. That is, Carlos is "leader," carlos is not. Elvira, Miguel, Renato, Ana and Dantes are members. However, Dantes never really joins and, furthermore, isn't really wanted. Renato tries but can't get gree of his other work. Renato turns out to be a "great guy," but rather lazy and finally stops showing up. Elvira, Miguel and Ana get torpedoed by Almeida Alves. Furthermore, this is a "team" that has never successfully dealt with the issue of leadership. They haven't been able to deal with American consultants, they haven't been able to deal with Carlos and Almeida Alves. And they can't deal with Sao's attempts to lead while denying that she wants to lead and undercutting anyone else who tries to lead. In part, the "team" is not a team because it has not really been trained to be a team. Neither Moses and Marcus really believe in the necessity to build a team. They think that it will emerge, to the degree that it is necessary, from a successful work process. It is interesting to note that the situation within the team may not be, in some respects, too different from the the situation in the larger project. People, both Portuguese and Americans, are more effective at frustrating each other's attempts to lead than they are at leading themselves.

ppn-03/08/83

Edite, Sao and I had a meeting this morning with Elvira and Miguel at the Planning Cabinet. There were a couple of items on the agenda. One was to work out how Elvira and Miguel will participate in the SGIF work in the regions. Another agenda item was to begin the process of standardizing the cost and budgeting process. A third item was an explanation by Elvira and Miguel of the work plan which they have developed for themselves as members of the Planning Cabinet, but which has overlap with and implications for the SGIF work. Elvira and Miguel will only work with the team when we are actually in the regions, but they will be fulltime during that time. They said that they have marked out those weeks on their calanders and will be with the team. It was decided that Edite will draft a list of items connected with the costing and budgeting process that should be standardized along with suggested standards. This will be distributed and then discussed at a meeting on March 17th. Elvira will get some written suggestions to us soon about some new forms that they want to use and some new forms that DCF recently started requiring. These will also be discussed at the March 17th meeting.

When we arrived in Oeiras after lunch Maria and Ana were very upset because Odette Carvalho had accused them of monopolizing the computers and had been quite rude to them. Odette said that she would see that Dr. Parnell took care of the matter. We may have to start posting a sign-up sheet. Competition for the computer may be a good sign, but it should be handled fairly and openly. Odette has actually had a great deal of time on the machine.

ppn-03/09/83

This was the second day of a major public transportation strike. It causes quite a bit of difficulty in getting to work. I am riding to work with Jim Black. Sao and Edite have the car provided by the C.G. The strike is supposed to continue all week.

Carlos was approved yesterday by the Secretary of State to be the head of the PIMS team and to continue as a member of the C.G. It looks to me as if he was forced into it and had no other real choice. I can't imagine why he would have taken the demotion in status. It would obviously have been better for his career to stay as Extension's rep. I also doubt that this will be good for the SGIF effort. There is a problem with "ownership" of the video equipment and the microcomputers. They have not been formally turned over to the Portuguese. The Portuguese (Almeida Alves and Carlos) have expressed concern that some of the equipment might disappear if someone is not made "responsible" for it, but they argue, correctly I suppose, that nobody can be responsible as long as it is not clear who owns it. Another sign of the lack of trust and cooperation between the Americans and Portuguese? Black says that he will ask A.A. what his preferences are.

I have asked Sao, Edite and Ana to give me a briefing, region by region, of the current situation of the project. This is because of some rather alarming things that I have heard in passing. For example, the Secretary of State will do away with all regional coordinators. In Viseu Cardoso Domingues will leave and all of the Agrarian Zone Chiefs will be replaced. Also a statement that the SGIF team is seen as demanding too much from the regions when we are there. Too many people tied up for too long a time. We have to reduce our "profile" and our demands on regional resources. Good news! There have been some very good yield responses from demonstration fields in Aveiro. The C.G. apparently has plans to publicize this.

Neither Odette nor Pennell were at work today: so I couldn't try to find out what happened yesterday about the micros. I did talk with Jim Black, but he hadn't heard about it.

I continue to have to follow-up on the micro purchase and installation. Copying programs and manuals takes a lot of time. Also purchasing supplies---paper, boxes for the disks, surge protectors, etc. I worked this afternoon with Ana drafting an announcement of the upcoming training event to be distributed to all Oeiras staff and Elvira and Miguel. I also worked with Edite. She is starting the document about regional monitoring activities.

PPN10

- ① Trouble with two computers (mine and one PROCALFER)
TOOK MY COMPUTER TO CELRAS.
- ② CDETTE CONTACTED ME ABOUT COMPUTER USE
- ③ ANA PROGRESSING WELL WITH DB MASTER. WORKED WITH VICTOR OLIVEIRA for a couple of hours.
- ④ EDITE AND SAC WRITING SCOPES OF WORK AND DESCRIPTION OF MONITORING PROCESS.
- ⑤ PLANNED MEETING WITH JOSÉ DE OLIVEIRA + ROSA AZEVEDO USURPED BY A.A AT LAST MINUTE WITH NO NOTICE OR APOLOGY. MEETING NOT RESCHEDULED.
J. de Oliveira couldn't make it this afternoon.
- ⑥ ASKED INTO MEETING WITH PENNELL, BLACK + CARLOS GONÇALVES.

PPN11

- ① ANA WORKED FOR 2 HOURS WITH VICTOR OLIVEIRA ON DE MASTER. BOTH SEEM TO BE EXCITED BY THEIR PROGRESS. ANA DOES WELL AS A TUTOR.
- ② PROCALFEA'S MACHINE TO BE READY MONDAY. MINE IS AT MICROPOR AND SHOULD BE READY TUESDAY OR WEDNESDAY.
- ③ WORKED WITH EDITE FOR 2-3 HOURS ON DEFS OF MONITORING SYSTEM. SHE WILL DRAFT DOCUMENT.
- ④ CONTINUE TO BE EXCLUDED FROM "TEAM" MEETINGS. SEEMS TO BE CALLOS' PREFERENCE. ANA IS ALSO EXCLUDED.
- ⑤ C.G. CONSIDERING PURCHASE OF ~~APPROXIMATE~~ MICROS (4-5) FOR POLICY GROUP/PLANNING CABINET.
- ⑥ INVITED TO MAKE PRESENTATION AT COLLOQUIUM SPONSORED BY ESTAÇÃO

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PPN~~4~~

Noel arrived. I picked him up at airport. He worked all day. We met with PERNELL AT 9:30 A.M. PERNELL EMPHASIZED THAT WE SHOULD NOT "OVERLOAD" THE TRAINEES IN THESE RELATIVELY BRIEF TRAINING SESSIONS. HE SEEMED TO SUGGEST THAT WE COULD GET MONEY FROM THE "TRAINING" FUNDS TO DO FUTURE MICRO TRAINING. WE MET WITH EDITE SAO & ANA AT 11:00, (SEE AGENDA).

~~THE~~ Noel and I WENT TO APAL TO PICK UP PROCALFER'S computer in the late afternoon. APAL has taken my computer to MICROPER since APAL's technicians are not allowed to open up power supplies. My power supply is burnt out and they will have to order some parts. It may be "down" for quite some time. To morning test as per the log. APAL did not receive certain notes. WE set it up in Ociand!

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PPN16

(ANA, Noel Ed)

In the afternoon we conducted a two "Executive Briefings" about the micros for the Coordinating Group. (Rose Aguiar, José de C and Almeida Alves were present. Carlos Travessa this week.) This meeting went me better than I expected.

I was concerned that the C.G. part H.A., might meet negatively to the point of ~~being~~. That morning I asked José de C for his views and he agreed to attend H.A. before the meeting. He reported that had no objection to José's presence. José's boss assured that H.A. would not attend. Vera had decided not to go as she was even somewhat nervous about the attempt after some experience at the annual, but she did attend. ~~that~~ was pleased with the report.

The meeting to take a new "micro" application to the market. Our objectives were the:

- (1) Let them know what we (micro) are doing here (micro training)
- (2) Give them a chance to raise issues about the ^{contemplated} microcomputer training, application and installation.

I spoke in Portuguese, Noel spoke in English. An hour and a half of Oliveira. The rest for the meeting seemed to be when we asked

Best Available Document

C.G. for input. Their priorities for micro applications were as follows:

(1) STATISTICS (Mário de Carvalho) There was agreement about this. It was also suggested that the long-term objective should include not just the calculation of statistics, but also interpretation of these statistics and the interpretation of research data, demonstration of data, soil data. He suggested that Mário de Carvalho should be sent to the U.S. for training in this area.

(2) Regional budgeting - He suggested that the VNTS should be used to develop a monitoring system this year and said that he would have no responsibility for it.

(3) Human resources in the area - This wasn't discussed much, but it was given priority.

Unresolved but supported:

- Insecticide resistance calculations (L. Lima)
- Credit application (L. Lima)

PPN16 (cont)

Word Processing was not given priority.

The U.S. recognizes this as an American need but they see it as competitive with the Portuguese needs.

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PPN 17

We spent the morning in Oiroas preparing for
our HP training session. The computers simply
do not work right with Applewriter II.
João Leitão (APAL) thinks that the problem
lies in the language card or in an
intermittent, intermittent problem between
the language card and the Sup. P. Term.
One ^{equipment} solution is to remove the Language Card
and insert it and see what happens.
VISA also needed. This is not acceptable
in the home room.

At 1:30 João, Edite, Ana and I went
to the library about to meet with Everaldo
and 1139 to discuss the situation. It was
unpleasant. We were not prepared. I had
to go away. We did not agree.
The discussion (I didn't like to like)
This would be easy agreement about
the suggestion made by João:

At 1:30 João and I met with João. This
was a bit of a surprise. He was
insistent (we were) that we
did not want to go ahead to create
a national laboratory micro.
He wishes that we should find
a problem definition and that this
could not be done in one class.
João replied that he would

PPN 17 (cont)

disappointed that we had decided to spend just a day. We explained that we thought that the problem was serious and that we would like to spend more time, but could not do so.

Pinheiro suggested that we spend a much longer time discussing the problem and investigating alternative solutions sometime later in the year. We agreed that he would talk to Finberg - I would talk to Perner - a possible return I would - I would contact.

PPN18

WP training was conducted today. It seemed to go well. We had 6 participants (Odette, Isabel, Lonia, Ross Maria, Maria J. and Rosario) Ana Varela and Maria do Monte helped Vol with the training.

A.A. brought over their machine to loan to us until our last machine is delivered. They also delivered the Epson 47780 printer.

I talked at length with Parnell, wants me to think about how to define and present the accomplishments of the PIMS event in the past year. What are the "products" of this work? Concern was raised by respondents. I will write a team to give me something in writing.

Today was the "big" meeting with the Sec of State, the C.G., Regional Directors, Regional Coordinators and Management Specialists were invited. Almeida Alves invited São & Edi after they inquired about going. São & Edi were angry and resentful when they returned. Apparently the meeting was ~~not helpful~~ a waste of time. A.A. made some basing, insulting remarks Augusto Lage. Rosa Aguiar was fool of himself in his presentation. new DGER "functional" represents

PPN18 (CONT.)

told Carlos that he would do the job
"on the weekends" and might not make
it to C.G. meetings.

Noel and I worked several hours on Saturday and Sunday to prepare for the training sessions, which started this morning. We had 19 participants in the morning and finished the day with 12. We are missing some key participants. Only 2 Regional Management Specialists (Adelaide and Leonel) attended the entire day. Aminda Reis was there in the last 2-3 hours. Three of our Management Specialists are involved in other training courses. Reis and Julieta Paradinha (Algarve) are enrolled in the "Common Agriculture Policy" course (Tostina and Torgemor), while João Costa (Beira Interior) is in the "Trainers" course in Caldas. This is the second time that João Costa has missed work with us because of a "business" course. He is also scheduled to be in a "Trainers" course from May 3-20th which ~~may~~^{will} conflict with our regional work in which we want to use him. I talked to Powell and he asked for a note about the problem.

Part of our problem with attendance may be that they didn't get an invitation, with a thorough explanation of our plans for training, long before the training. Instead, they were contacted by phone with a somewhat indefinite explanation of the training and, just before the start of the training, time

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PPN21 (CONT)

received the normal "oficio." We must get better at this.

The Portuguese FIMS team continues to work independently of Noel and I. This has led to a certain lack of coordination between us. They are unsure what we are doing and vice versa. They seem to feel that they have to work independently of us in case we are in control. In fact, I think that they have to be able to work with us and be "in control." I think that I will issue this with them.

Yuri did most of today's Training session. He was publicly complimented for his performance on information systems which he said cleared up some long-standing questions on the subject.

There was an early morning (local) meeting in Odivos between Almeida Silva, Lourenco, "Luca" Boudreau and Joao Luis Finkler.

It must have been connected with the results of the meeting with the Government State last Friday. Fernell said that Finkler had called early this morning with a number of "orders" some of which he had received.

We had another equipment failure today. The machine that Noel brought wouldn't even boot. We fixed it by "footing around."

I've ~~had~~ had a very bad cold for the past few days. ~~Yesterday~~ ^{Today} I returned to the apartment and slept for a couple of hours in the afternoon, while Noel conducted the first "DB Master" training session. In the morning I conducted the first "VisiCalc" training session. In both subjects it is apparent that we will be able to do little more than "once over lightly." There is a tremendous amount of "detail" to learn in each program; especially in DB Master.

Noel feels that we should have defined a few very specific applications and developed a detailed implementation of those applications (input forms design, report design, templates, etc) before doing much training. In this way, training would be concentrated on a few key users and would be "in-depth." While I share his perception that we have a relatively large group of heterogeneous potential users in our training sessions, many of which will not succeed in applying the computers to their work, I'm not sure that we could do it the other way.

At the close of work there was an interesting discussion, part of which I missed. Evidently, it started with Sam ~~of~~ expressing

22
PPN ~~22~~ (cont.)

dissatisfaction with the fact that Noel and I were going to Porto for two days next. Evidently she had not been aware that we were going to be away and she thought that we were going because we were asked/told to go by Finberg. Actes were asked to go by Almeida Alves, although he made it clear that the Americans we were more interested in this than he was. I walked into this conversation and took opportunity to raise the issue of work "for" the team rather than "with" the team. That is, the team isn't very aware of our work and vice versa, at least in part because we work for them rather than with them. Since there is a serious indefiniteness about our work, the team emphasized the need for written reports from Noel and I in order that they might follow through on our work - we are gone. I wish I knew when going to get this done.

PPN 23

Bad cold continues! Today was difficult to
through. Our agenda included a meeting
with the Management Specialists re monitorin
(all day) and a training session on
statistical analysis (all day).

Has conducted the statistical training. My
Mario de Carvalho, our "star pupil" was
and did not attend.

The monitoring meeting was neither "good"
"poor" but preparation for it was very so.
Sao + Edite were supposed to prepare the meeting
week, but they became very involved in help
Carlos prepare for the meeting with the Sec
of State and let the preparations slide.
Neither Sao nor Edite, but especially not Sao,
wanted to take responsibility for preparing &
conducting the meeting. The meeting was set
for all day, but we weren't ready in the
morning. Fortunately, there was an outcome
last & filling in the new wage scale was
DCP recently announced. Adelaide + Edite
supervised the general Management Specialists in
in while Sao, Edite, Miguel and I prep
for the meeting. We broke for lunch &
not really being finished. After the
Sao insisted on playing games on the
computer despite my objections for "just
minutes." My five minutes lasted an hour.
Edite and I finished the preparation

PPN 23

For a few moments there was talk of canceling the meeting. I was really frustrated. I asked Sao, Edite, and Ana to have a 10 minute meeting with me and told them of my perception that we had done a lousy job of preparing, but that we could still ~~do a good~~ have a good meeting if someone was willing to take charge and make decisions "on their feet" as the meeting unfolded. I think the meeting went O.K. but as far as I know, the team hasn't talked about the experience. They really should "process" their experience in not preparing well.

PPN24

We continued the Visi Calc and DB M_o training sessions. It is clear that we need more time — especially for DB Master.

Noll "interviewed" Bill Lohrke this morning re possible use of micros for handling ~~and~~ various kinds of data from research fields, demonstration fields and soil survey test results. In part we wanted to interview him just to ~~check the~~ ~~possibilities~~ compare with other American consultants. Lohrke suggested computer generated fertilizer + limestone recommendations based on soil results and planting (crop) intentions. The best application of the micros. We will write up some notes about this.

Both training sessions were animated, a lot of time on the machines. Unfortunately we don't have enough machines (just 3). But people are interested and motivated.

Noll conducted a special, private session with Mario de Carvalho using SPS and Visi Calc. That. Mario seemed "turne" about using the computer. A small program ~~may~~ ^{will} be necessary in order to carry out the applications that he wants to do. Lots of to go!