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creative associates, inc.

**MID-POINT PROGRAM
EVALUATION OF
JAMAICA/
WESTERN NEW YORK
PARTNERS
OF THE AMERICAS
PARTNERS VOLUNTARY
TECHNICAL
ASSISTANCE SERVICE**

5320086

MARCH 12-APRIL 3, 1985
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and
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Vallen Associates, Ltd.

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OF
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PARTNERS VOLUNTARY TECHNICAL ASSISTANCE SERVICE
PAVTAS**

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CREATIVE ASSOCIATES

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EXECUTIVE SUMMARY

1. Background

In 1981 the Jamaica branch of the Jamaica and Western New York Partnership initiated a change in organizational structure which led to the OPG of USAID in September 1982. This change produced many tensions and apprehensions and these in turn placed constraints on the implementation of the project.

These constraints were gradually reduced over a two year period so that Western New York began participation in the PAVTAS project once more in October, 1984. Since that time, there has been a general increase in receptivity to the PAVTAS program. WNY has engaged an Executive Director, established an office, increased its N-S Technical Assistance (TA), and generally increased its level of efforts toward meeting PAVTAS objectives. Jamaica Partners has responded to this increased activity and provided support and assistance. This indicates that the potential now exists for future progress toward better communication and mutual support between WNY and JA. It also provides a framework in which the PAVTAS program can be made to achieve more of its original objectives.

2. Achievement

Partners has made significant progress toward meeting PAVTAS objectives in the following areas:

- f) Staffing: An effective and operational staff and administrative infrastructure has been brought on stream in both JA and WNY.
- fi) Skills Bank: Skills Bank membership in Jamaica has grown from 6 in 1983 to 77 individual and 6 corporate to date. WNY membership has grown to 66 individual members. Volunteers have been recruited on the basis of technical expertise, trainer skills, and cross-cultural sensitivity.
- fff) Membership: General Membership in Jamaica currently stands at 98 individual and 28 corporate. In WNY it stands at 38 individual and 1 corporate.
- iv) Jamaica Technical Assistance: Jamaica technical assistance (TA) activities have been conducted involving Jamaica Skills Bank Volunteers. Beneficiaries of TA report a high level of satisfaction with the quality of the assistance. A total of 329 individual Jamaicans and 17 Jamaican agencies have benefited from the TA.

Partners has made only minimal progress toward meeting PAVTAS objectives in the following areas:

- 1) Fund Raising: In Jamaica to date fund raising has consisted only of in-kind contributions from members and some donations to specific non-PAVTAS projects. In WNY, only in-kind contributions have been made.

Both sides of the Partnership have many potentially fruitful ideas about fund raising strategies. To date, little or no action has been taken to bring these ideas to realization. (see Chpt. 2.12)

- ii) Information Data Base: The resource library in Jamaica is incomplete. Didactic resource material developed during TA workshops is on file in print, but has not been converted to electronic media. No computer links have been established with associated agencies.
- iii) Paired N-S Technical Assistance: Considerable TA has been provided using only Jamaicans or only North Americans as trainers. To date the concept of pairing North Americans with Jamaicans to form TA delivery teams has not been brought to fruition.
- iv) Mutual WNY/JA Planning and Coordination: For the first two years of the OPS, communication and relations between the two partners were strained due to differing perspectives regarding implementation of the program. Since October, 1984 these differences appear to have been resolved.

3. Administration

Even though the same terms may be used, the perceptions on both sides do not always coincide. Main areas of differences appear to be in relation to:

- i) the role of PAVTAS vis-a-vis the total Partner Program;
- ii) the nature of the flow of technical assistance from South to North;
and
- iii) the application of the not-for-profit criterion to PAVTAS projects.

4. Finance

There is a balance of approximately US\$200,000 at the end of March 1985 from the Jamaica budget. Western New York is spending at an average of US\$4,000 per month. If activities are increased by seventy five percent (75%) in WNY, re-allocation of resources between the Partners may become necessary.

In-kind contributions by Volunteers is estimated at J\$62,000 since PAVTAS.

5. General Recommendations:

- i) It is recommended that AID Funding be extended for a period of one year with an option to extend for one additional year for a total extension period not to exceed two years. The option to renew should be conditional upon achievement of predetermined objectives. (see chpt. 8.1). These objectives should be specifically defined and agreed upon by representatives of WNY, JA and USAID prior to entering into the first year of extended funding.
- ii) It is recommended that during the first year of extended funding, Partners should focus its efforts on fund raising, refinement of N-S technical assistance delivery, and increased mutual planning between WNY and JA. (See Chpts. 8.3 and 8.4).

CHAPTER 1

BACKGROUND

1.1 Description of Partners Programme

1.1.1. The background of this project will be given some detail for two principal reasons:

1) Our findings and recommendations are directly related to and encompassed by

a) the objectives and goals of the Partners of America Program as we understand them;

b) the specific objectives and goals of the Jamaica and Western New York Partners as expressed in the project document.

and c) our understanding of what USAID sees as the goals of the programme.

2) During our interviews it became clear that there is some measure of confusion and lack of knowledge concerning the program and the functions of its various parts. Some Board Members, Skills Bank Volunteers and Members, appeared to have varying perceptions of the relationship between PAVTAS and the Partners programme as a whole.

1.1.2. The Partners of the Americas was established in 1964 when the United States Agency for International Development (USAID) set up this organization as a counterpart to the Alliance for Progress. In 1967 USAID transferred the functions to a private agency which was called the National Association of the Alliance, and changed in 1970 to Partners of the Americas.

1.1.3. The Partners network consists of paired relationships between States, or parts of States within the USA and countries or parts of countries in Latin America and the Caribbean. To illustrate, the State of New York is divided and paired with Barbados, Trinidad and Tobago and Jamaica, whereas Brazil is divided into some eighteen parts and paired with Colorado, Connecticut, Georgia and other States. At this time there are fifty-six (56) Partners in the network.

1.1.4. Within the USA the partner States are linked in an Association called the National Association of Partners of the Alliance Inc. (NAPA) Partners outside the USA do not have a similar association. NAPA acts as a backstop to the various partnerships and is a source of limited funding. Since 1982, NAPA has made funds of J\$16,800, J\$28,200, and J\$13,900 available annually to the Jamaica Partner. The Partnerships are, however, autonomous and are solely responsible for the determination of the scope and depth of their relationships.

1.1.5. The purpose of this network of partners as envisaged by USAID was to serve to:

- i) Promote development in Latin American countries,
- ii) Develop self-help attitudes in Latin America,
- iii) Strengthen democratic organizations and broaden understanding, and
- iv) establish lasting friendships.

1.1.6. These objectives are consonant with those of the Partners of the Americas which as stated in a 1970 evaluation by Maurice Bernbaum, were originally to,

- i) Develop self-help attitudes,
- ii) Strengthen democratic institutions
- iii) Broaden understanding among people of the USA and Latin America.

1.1.7. The specific objectives and goals of the Jamaica and Western New York partnership are detailed in Chapter 2 of this report. All are within the scope of the purpose envisaged by USAID and the Partners of the Americas.

1.1.8. Jamaica and Western New York joined in partnership in 1970, and within the decade over one hundred exchanges were made. The outstanding features of the exchanges were that they consisted largely of North to South movements and were initiated within a relaxed, informal one-to-one framework.

1.1.9. This atmosphere changed dramatically in 1981. Probably influenced by Partners 1985 Plan, under a new Chairman, the Jamaican Branch of the Partnership began planning a formal organizational structure, which had very far-reaching effects.

1.1.10. In order to finance these new developments, USAID was approached for an Operations Programme Grant (OPG). The negotiations were conducted with both Partners but the laws governing AID grants and the proximity of the USAID office in Jamaica, immediately placed the Jamaica partner in the leadership role. This raised tensions between the two partners.

1.1.11. Within the Partners, and particularly in Jamaica, tensions also developed. Some programmes, notably PATH and Community Education had been doing quite well in the informal structure. What would the changes mean to these programmes?

1.1.12. There was concern among some Board members that PAVTAS would come to dominate the structure, and mitigate against the maintenance and development of personal friendships which had been formed over the years.

Both sides of the partnership experienced anxiety regarding the measure of personal contact that would be possible with PAVTAS.

1.1.13. On the other hand, there were those who were impatient with the old structure, and saw the work being done as semi-holiday efforts.

1.1.14. The Western New York partners felt that a disproportionately small part of the OPG was allotted to them and that this sum was inadequate. Could these opposing views be reconciled with the program?

1.1.15. The successful implementation of plans to restructure the program required the resolution of these opposing views, and therein lay an important constraint; a constraint which pervaded relations between the partners as a body, and which seriously affected developments for the first two years of the life of the project.

1.1.16. There are positive indications that the planned new structure was influenced by development within the Partners of America philosophy. The objectives of the project bear close resemblance to recommendations in the Partners 1985 Plan. A short list of some of these are:

- i) "Each Partnership should have an Executive Director to coordinate planning and administration."
- ii) "Each Partner should develop a budget and raise its own funds for its organizational cost."

- iii) "Each Partner should develop and implement a comprehensive membership recruitment and development program."
- iv) "Each Partner should work for the optimum involvement of Volunteers."
- v) "Partnerships should secure clerical and administrative positions to assist their officers and free them to provide management and leadership."

1.1.17. The attitude of USAID to the PAVTAS project might have been influenced by the findings and recommendations of William P. Steadman Jr. who was commissioned by them to undertake a study of the Partners in 1980. Some relevant quotes are:

- i) "The program supports U.S. foreign policy by fostering people-to-people relationships and understanding,"
- ii) "The bilateral partnerships still need strengthening, more funds, more members, broader geographic scope, better communication, greater public recognition, and improved capacity to design and implement projects,"
- iii) "Partnerships should create the position of Executive Director to help strengthen their performance. The Executive Directors should be well qualified, experienced in development, capable administrators and preferably proficient in appropriate languages."

- iv) "Partners should concentrate on increasing their membership through recruitment of selected professional who are leaders in their fields, rather than through general membership campaigns."
- v) "The program is not well known."
- vi) "There is little systematic effort to record and disseminate experience among the Partners."
- vii) "The strength and future viability of the program lies in the local autonomous character of the individual partnerships and the direction they take by their own decision."

1.2 Project Purpose

The purpose of the approach to USAID was to obtain US\$500,000 over three years "to support the organizational, administrative and the financial requirements for strengthening the ongoing programme of voluntary technical assistance provided through the Jamaica/Western New York Partnership program." The total cost of the project was estimated at US\$675,000, the additional \$175,000 of which would have been raised from "local and external fund raising and from in-kind contributions."

1.2.1. The project, called Partners Voluntary Technical Assistance Service (PAVTAS) has four program elements;

- i) The service would be offered only to not-for profit educational and social organizations that served at least one hundred clients directly.

- ii) The target audiences would be;
 - a) Women
 - b) Youth
 - c) Handicapped persons
- iii) The program objectives would be
 - a) Employment opportunity creation
 - b) Development of marketable skills
 - c) Preventive intervention
- iv) Program areas would be,
 - a) Agriculture
 - b) Arts and Culture
 - c) Education
 - d) Partners Appropriate Technology for the Handicapped (PATH)
 - e) Health
 - f) Small Business
 - g) Women in Development
 - and lately h) Sports was added.

1.3 Project Design and Implementation

1.3.1. The concept paper on the project was prepared by the Jamaican partner and discussed with USAID and the Western New York Partners.

1.3.2. Although this tripartite arrangement was maintained throughout negotiations, the Jamaica partner was more largely responsible for the development and design of the project.

1.3.3. The implementation plan appears as Appendix 1.1 to this chapter.

1.4 Purpose of Evaluation

1.4.1. This evaluation is being conducted during the third year in the life of the project and has as its purpose inter alia, to determine whether or not the life of the project should be extended.

1.4.2. The scope of work is as follows.

1.4.3. The Evaluators will monitor and assess project implementation procedure and process and determine the extent to which the project to date, has met with the goals and objectives of the project.

1.4.4. The Evaluators will monitor and assess technical assistance delivery, monitoring, and documentation process.

- 1.4.5. The Evaluators will assess what impact the Training workshops so far organized, have had on Voluntary Agencies they were designed to serve, i.e. in areas of improved administration and management, financial management and improved delivery of goods and services.
- 1.4.6. The Evaluators will assess the quality, effectiveness and impact of the voluntary technical assistance professionals from both Jamaica and Western New York.
- 1.4.7. The Evaluators will monitor and assess the development of the skills bank, its effectiveness to date and its projected growth.
- 1.4.8. The Evaluators will determine the extent to which End of the Project Status Conditions have been or are being achieved and shall examine the overall impact of the project as planned; and determine whether or not the life of the project should receive a non-funded extension of one year to adequately meet the existing needs of the project.
- 1.4.9. The Evaluators will identify behavioral, attitudinal or operational changes among individual recipients of technical assistance, beneficiary agencies and the persons they serve.

1.4.10. The Evaluators will examine and analyse the administrative capabilities and financial resources of the Partners Voluntary Technical Assistance Service (PAVTAS) in both Jamaica and Western New York and determine their capabilities and resourcefulness in administering the project after the PACD. Detailed attention should be paid to the capabilities and actual achievements of Western New York Partners and Jamaica Partners to raise funds for project purposes and contributions in kind in the form of voluntary technical assistance.

1.4.11. The Evaluators will identify constraints impeding the realization of End of Project Conditions particularly in relation to N-S collaboration efforts.

1.4.12. The Evaluators will assess the achievements of the project. They should analyse the efficacy of the project's methodology and operations in relation to the stated objectives. In arriving at conclusions, the Evaluators will review relevant project documents."

1.5. Evaluation Methodology

1.5.1. Two consultants were engaged for the evaluation process. Mr. Michael Wilburn, Project Evaluation Consultant of the USA and Mr. Vernon Allen, Management Consultant of Jamaica assumed duties on

March 13 and worked in Jamaica until March 25 when they left for Buffalo, New York.

While in Jamaica the team accomplished the following;

A. Held interviews with:

- i) Dr. Joseph Carney - Head OCHRD - USAID.
- ii) Dr. Lloyd Hunter - Chairman - JA/WNY Partners
- iii) Mrs. Eleanor Jones - Secretary - JA/WNY Partners
- iv) Mrs. Rolande Johnson - Exec. Dr. - JA/WNY Partners
- v) Mr. Enid Lawrence - Programme Assistant - JA/WNY Partners
- vi) Mr. Lerof Lorde - Treasurer - JA/WNY Partners
- vii) Mr. Eric Brown - Past Treasurer - JA/WNY Partners
- viii) Mr. Horace Davis - Broad Member and Volunteer JA/WNY Partners
- ix) Ms. Hertencer Lindsay - Board member - JA/WNY Partners
- x) Miss Ivy Baxter - Board Member, Volunteer, JA/WNY Partners
- xi) Hon. Wesley Powell - Board Member - JA/WNY Partners
- xii) Mrs. Dahlia Repole - Board Member - Ja/WNY Partners
- xiii) Dr. Marigold Thorborn - Board Member - JA/WNY Partners
- xiv) Rev. Webster Edwards - Former Board Member - JA/WNY Partners
- xv) Mr. Carmen Tipling - Volunteer - JA/WNY Partners
- xvi) Mrs. Miriamme Samad - Volunteer - JA/WNY Partners
- xvii) Mrs. Patricia Morgan - MICO Care T.A. Beneficiary
- xviii) Mrs. A. Grant - Representing T.A. Beneficiary
- xix) Mrs. C. Nichols - Representing T.A. Beneficiary
- xx) Mr. Anthony Holness - Representing T.A. Beneficiary
- xxi) Mr. Michael Rich - Representing T.A. Beneficiary

- B. Observation of a) Jonestown and
b) Walkerswood projects

C. Review and Analysis of the following documents:

- i) Minutes of Board Meetings
- ii) Executive Directors' Reports
- iii) Project Document and Amendments
- iv) Monthly and Quarterly Financial Statements
- v) Annual Audited Reports
- vi) Newsletters
- vii) Annual Reports
- viii) Jamaica Partners Selection Committee Reports
- ix) AID General Correspondence files
- x) PAVTAS Technical Assistance activity files and evaluations
- xi) "Evaluations of the Partners of the America" - a study undertaken by William P. Steadman Jr.
- xii) Partners 1985 Plan.

1.5.2. The Evaluators arrived in Buffalo on the night of Thursday March 28...Unhappily that weekend was to see the departure on holidays of most of the persons whom the Consultants wished to interview. For the most part, only Friday, March 29 was available for interviews.

The consultants met the following Board members at a Board meeting specifically scheduled for the purpose.

- A. Dr. Keith Curry - President WNY/JA Partners
Ms. Roberta Powers - Secretary WNY/JA Partners
Mr. Daniel Ricigliano - Treasurer WNY/JA Partners
Mr. James Casey - Volunteer WNY/JA Partners
Dr. Allan Korn - Board Member WNY/JA Partners
Dr. Kenneth Cross - Volunteer WNY/JA Partners
Dr. Lee Snyder - Board Member WNY/JA Partners
Mr. Paul Bahr - Board Member WNY/JA Partners
Mr. George Reidel - Board Member WNY/JA Partners
- B. In depth interviews were held with
- i) Dr. Keith Curry
 - ii) Mrs. Carolyn Eckert - Executive Director - WNY/JA Partners
 - iii) Mrs. Mary Nixon - Secretary - WNY/JA Partners
 - iv) Mr. Daniel Ricigliano - Treasurer
 - v) Dr. Kenneth Cross - Chairman Community Education
 - vi) Dr. Allan Korn - Chairman Small Business
 - vii) Mr. George Reidel - Former Chairman and Secretary
- C. The following documents were reviewed and analysed-
- i) Financial records of WNY/JA Partners

	SCHEDULE												ACCOUNTABILITY					
	MONTHS												P	C	C	C	C	
	1	2	3	4	5	6	7	8	9	10	11	12						
24. Hold New Membership Orientation Session (Corporate and Individual).							→							Ja/WNY				
25. Prepare Quarterly Report.							→							Ja/WNY				
26. Commence delivery in-house technical assistance.									—	—	—	→		Ja/WNY				
27. Monitor technical assistance delivery.								---	---	---	---	→		Ja/WNY				
28. Document technical assistance delivery.								---	---	---	---	→		Ja/WNY				
29. Initiate publication of PAVTAS quarterly Newsletters.									→					Ja/WNY				
30. Develop and submit Evaluation Plan to USAID.														Ja/WNY				
31. Develop and initiate other fund-raising activities.														Ja/WNY				
32. Develop strategies for project continuation beyond USAID funds.														Ja/WNY				
33. Prepare first year report.														Ja/WNY				
34. Submit first year report to USAID.														Ja/WNY				
35. Hold joint Annual Review in Jamaica.														Ja (and WNY)				
36. Continue technical assistance delivery.														Ja/WNY				

TO COMMENCE IN 1984

OBJECTIVES	SCHEDULE												ACCOUNTABILITY						
	MONTHS												P	C	C	C	C		
	1	2	3	4	5	6	7	8	9	10	11	12							
6. Visit WNY for Operational Planning and Skills Bank Resource Identification.			→											Ja. (and WNY)					
5. Hold PAVTAS "Financial Management Workshop."				→										Ja.					
5. Document and monitor agency-specific technical assistance (Phase I)														Ja.					
7. Assist Community Education Committee with co-ordination CARCEC Workshop, Montego Bay.				→										Ja.					
3. Plan PAVTAS "Office Protocols" Workshop.					→									Ja.					
9. Initiate plan for PAVTAS First Year Awards Event.						→								Ja.					
0. Hold Annual General Meeting						→								Ja.					
1. Hold PAVTAS "Office Protocols Workshop."							→							Ja.					
2. Commence delivery T.A. to PAVTAS Client Agencies. (Phase II)														Ja. (and WNY)					
3. Stage PAVTAS First Year Awards Event.														Ja.					

OBJECTIVES	SCHEDULE												ACCOUNTABILITY					
	MONTHS												P	C	C	C		
	1	2	3	4	5	6	7	8	9	10	11	12						
24. Publish half-yearly newsletter.						*								Ja.				
25. Implement Evaluation Plan														Ja. (and WNY)				
26. Implement fund-raising plan.														Ja. (and WNY)				
27. Refine strategies for project continuation beyond USAID funds.														Ja. (and WNY)				
28. Plan PAVTAS "Project Management" Workshop Phase II.									→					Ja.				
29. Continue delivery agency-based T.A. programme.														Ja. (and WNY)				
30. Continue Skills Bank Expansion.														Ja. (and WNY)				
31. Hold Operational planning meeting with Executive Director (WNY) in Jamaica.														Ja. (and WNY)				
32. Hold Membership Seminar.														Ja.				
33. Hold "PAVTAS" Project Management Workshop Phase II.														Ja.				
34. Commence PAVTAS Application procedure Phase III.														Ja.				
35. Plan PAVTAS "Personnel Management" Workshop.														Ja.				

NA PLAN - YEAR THREE

(OCTOBER 1st 1984 - SEPTEMBER 31st 1985)

OBJECTIVES	SCHEDULE												ACCOUNTABILITY	
	MONTHS													
	1	2	3	4	5	6	7	8	9	10	11	12		
• NAPA Desk Officer to visit Jamaica	-													Ja.
• Hold quarterly Membership Meeting	*													Ja.
• St. Catherine Parents Assoc. reps. to WNY (Nesbett/Ricketts)	-													Ja/WNY
• NAPA Convention in Washington	*													Ja/WNY
• Conduct Programme Planning with WNY Director														Ja/WNY
• Visit Em Prep/WNY Chairman to Ja. (Casey)		-												Ja.
• Commencement PAVTAS Culture Admin. Workshop		-												Ja.
• Interview/Engage Programme Assistant			-											Ja.
• Prepare Quarterly Report				-										Ja.
0. Orient Programme Assistant					-									Ja.
1. CTC Audio-Visual Training begins (Rusch/Berggren)										-				Ja/WNY
2. Sch. Art Dye technology research. (Hamilton)														WNY
3. Small Business Export Programme (Calverly)														Ja/WNY
.. Prepare for and Hold 4-H Culture Workshop (Baxter)														Ja.

OBJECTIVES	SCHEDULE												ACCOUNTABILITY	
	MONTHS													
	1	2	3	4	5	6	7	8	9	10	11	12		
15. Hold Annual General Meeting					*									Ja.
16. Visit of NAPA Caribbean Representatives					—									Ja.
17. Salvation Army Curriculum Programme (Ruffino/Balon)					—									Ja/WNY
18. VOUCH Child Abuse Programme (Moriah, Wright)					—									WNY
19. Commence Fundraising thrust														Ja/WNY
20. Jam. Assoc. Deaf Guidance Programme						—								Ja.
21. USAID/JA Programme Evaluation						—								Ja/WNY
22. Residency Exchange/Bustamante Hospital (Welliver)							—							Ja/WNY
23. Occupational Health Programme (Morrales)							—							Ja/WNY
24. Fundraising/Grantsmanship Programme								—						Ja/WNY
25. Vocational Training Observation Programme (Shirley/McDowell)								—						Ja/WNY
26. Exec. Dir. (JA) visit WNY for Planning									—					Ja/WNY
27. JA. 4-H Clubs Marketing Programme										—				Ja/WNY
28. Hold PAVTAS Volunteer Ceremony											—		*	Ja.

OBJECTIVES	SCHEDULE												ACCOUNTABILIT			
	MONTHS															
	1	2	3	4	5	6	7	8	9	10	11	12				
29. Prepare and publish Newsletter																Ja.
30. Continue Monitor and Document technical assistance																Ja/WNY
31. Continue Skills Bank Expansion																Ja/WNY
32. Continue New Membership Recruitment																Ja/WNY
33. Review and Evaluate years Programme																Ja.
34. Commence preparation budget & Op. Plan 1985 - 6																Ja.
35. Continue Public Relations Programme																Ja.

CHAPTER 2

ACHIEVEMENTS IN RELATION TO STATED OBJECTIVES

2. This section of the report provides a description of the development, achievements and current state of the PAVTAS programme in relation to each of the twelve Project Objectives.

2.1 Objective 1: "Develop and maintain an office administrative structure for servicing and delivery voluntary technical assistance."

2.1.1. In December, 1982, an office was established in Kingston for the administration and support of PAVTAS activities in Jamaica. This office had been used previously by Partners and was retained for the purposes of PAVTAS. The process of acquiring office furnishings and equipment was somewhat prolonged and problematic. While the furniture arrived rather quickly, most of the other significant office equipment did not become available until as late as May, 1984. Prior to this time such equipment as typewriters, photocopier, etc. was rented. The office is currently operational and adequate for providing support to on-going Partners activities. The offices provide:

- office space for personnel
- a conference room for board meeting and other group functions

- a reception area with Partners promotional displays, and
- an additional room for files, storage and library space.

2.1.2. Significant inventory of equipment include:

1 IBM Computer	1 Overhead Projector
1 Photocopier	2 Audio Tape Recorders
1 Refrigerator	1 VIR Camera
1 16mm Projector	1 set of Headphones
1 Office Calculator	

2.1.3 Prior to October 1984, Partners' activities in Western New York were supported and managed using offices of WNY Board members on the Campus of a local University. During a meeting in November, 1983, representatives of Partners from WNY and Jamaica decided that distinct office space was needed. In September, 1984, Mrs. Carolyn Eckert was employed as director of WNY Partners. She located and established the office immediately upon finalizing her terms of employment. The office is smaller than in Jamaica but it is adequate for the needs and level of staffing in WNY. Currently the WNY office provides:

- office space for the staff;
- a reception room shared with an adjacent office; and
- a large conference room available by reservation

2.1.4. The office contains:

An Apple computer, an electric typewriter and assorted disks, chairs and shelves. Audiovideo equipment is not considered necessary at this time. However, there is a need for slide projector and portable screen for use in conducting presentations.

2.2 Objective 2: Recruit and engage an Executive Director and Secretary in Jamaica and Western New York."

2.2.1. In Jamaica, an Executive Director was engaged on a part time basis in December, 1982. She then became fulltime as of January, 1983. At that time she was joined by a support staff of one fulltime office helper, one parttime bearer, a parttime accountant and a fulltime secretary/receptionist. As the activity level and focus of the office shifted from set-up and procedural design to Technical Assistance and Recruitment, the needs for a support staff also changed. At present, the Jamaica Staff consists of:

- 1 Executive Director (Fulltime since Jan. 1983)
- 1 Programme Assistant (Fulltime since Jan. 1985)
- 1 Secretary/Receptionist (fulltime since Jan. 1983)
- 1 Office attendant (Fulltime since Dec. 1982)
- 1 Accountant (Parttime since Jan. 1985)

Services of an Accounting Firm (on an as needed basis to maintain computerized accounts record since October 1984)

Services of a Secretary to the Board (on an as needed consultant basis since January, 1985)

2.2.2. In Western New York, a fulltime Executive Director and parttime secretary were engaged in September, 1984. Prior to that, WNY activities were administered by members of the Board and Voluntary Assistants on a parttime basis. Since September, the Executive Director and her secretary have established themselves quickly and have begun to effectively implement PAVTAS policy and procedures.

2.3 Objective 3: "To develop and maintain a Talent/Skills Bank of paired North/South Technical Assistance delivery teams."

2.3.1. In January, 1983, the PAVTAS Skills Bank in Jamaica consisted of six persons from the existing Partners Board. Since that time, the total membership has risen to 77 persons representing the full range of skill areas identified in the PAVTAS project document. Recruitment has primarily resulted from searches for qualified individuals to deliver requested technical assistance, word-of-mouth, networking, and planned efforts on the part of the Board.

2.3.2. In Western New York, Skills Bank membership currently stands at 66. Recruitment has been primarily as a result of conducting searches for qualified individuals to conduct TA activities. Committee chairpersons have taken the major responsibility for recruitment.

2.3.3. To date, no systematic efforts have been made to identify pairs of matched or complementary north/south TA delivery teams. In some cases in which WNY volunteers have gone to Jamaica, this pairing has occurred coincidentally as a result of providing TA to Jamaica professionals.

2.3.4. A detailed description and analysis of the Skills Bank is provided in Chapter 4 of this Project.

2.4 Objective 4: "Render technical assistance to selected not-for-profit social and educational agencies in Jamaica using specified criteria in such areas as:

- Proposed development
- Programme Planning and Management
- Programme Monitoring and Evaluation
- Programme Implementation
- Fund Raising Program Design
- Project Management

- Budgeting and Cost Accounting
- Organizational Development including incorporation, operational planning and record-keeping
- Personnel Training and Human Resource Development
- Programme documentation
- Information gathering, retrieval and dissemination
- Transfer of appropriate technologies in areas such as: education, special education, communication and project management."

2.4.1. Technical Assistance under the PAVTAS funding began in January, 1983. Since that time sixteen technical assistance activities have been conducted using PAVTAS Funds. Approximately seventeen Jamaican agencies have benefitted from these activities. Three hundred forty seven Jamaicans have participated as recipients of assistance. Fourteen of the TA activities have been conducted in Jamaica. The remaining two activities have been conducted in WNY. (Chapter 3.1 contains a detailed inventory of past and pending PAVTAS TA activities)

2.4.2. Currently the Technical Assistance provided under PAVTAS has been generally well-received and effective at providing beneficiaries with desired results. JA and WNY Partners have established procedures for determining the eligibility of requesting agencies and the type of assistance they request.

These procedures and eligibility criteria conform to those specified in the PAVTAS project document. JA and WNY have also established procedures for setting-up, conducting and evaluating the technical assistance workshops.

2.4.3. A detailed description and analysis of the systems for Technical Assistance delivery, monitoring and impact on recipients is provided in Chapter three of this report.

2.5 Objective 5: "Document the technical assistance rendered and its results through the use of print, film audio, and video tape."

2.5.1. The Jamaica staff developed a procedure and set of instruments for documenting each technical assistance activity conducted in Jamaica. The basis for this documentation involves maintaining a complete file containing all correspondence, eligibility and request forms, reports, evaluations, activity schedules, etc. on each activity. In addition, photographs have been taken of all activities. The audio and video recording equipment arrived in September, 1984. Since that time some efforts have been made to record workshops. In general the documentation has been adequate to meet the needs of the project.

2.5.2. In Western New York, listing and tracking of TA activities is done by computer. A system of retrieving them by topic/content as well as chronologically is in place. Completed printed documentation of all TA is on file for the period since October, 1984. The WNY staff has almost completed efforts to locate and organize files for activities prior to October, 1984.

2.6 Objective 6: "Develop an information data base system on all PAVTAS activities which will be compatible with computerization."

2.6.1. In Jamaica, very little action has been taken regarding this objective. A computer was purchased and arrived in the Jamaica office in mid-March, 1985. Since it only recently arrived, the JA Partners staff has not as yet, set it up and brought it into functional service. At present, only the part-time accountant has any training in computers and there is no one the full-time staff with the skills necessary to make maximum use of the new computer. The IBM company will provide some basic introductory training, but more training will most certainly be necessary in order to fully meet the objective of establishing and maintaining a computerized data base. Plans for use of the computer in Jamaica include using it to assist in:

- accounting and financial disbursement;
- skills bank storage and search;

- data resource links with other Partners organizations, similar agencies and WNY Partners
- storage of resource information relating to Technical Assistance, models and material;
- monitoring and tracking of achievement of organizational goals; and
- assisting in tracking and providing services to members.

2.6.2. In WNY, the computer was brought into operation immediately upon setting up the office. Currently, programs are in place for handling routine office chores, doing bulk mailing, tracking and categorizing Skills Bank Volunteers, Membership listing and work processing. Accounting systems are in place for linkages with associated organizations.

2.7 Objective 7: "Develop a library of PAVTAS Technical Assistance delivery modules and materials in print and electronic media formats."

2.7.1. Since the delivery of the first Technical Assistance in Jamaica, files have been maintained on each activity. These files contain a sample of the schedule and design of each activity as well as copies of all handouts and other resource materials used during the activity. A small library containing a few books and periodicals is located in the Jamaica Partners office. This library is very informal and evolved as a result

of obtaining books and publications in direct response to immediate needs. There has been no real deliberate effort to establish a resource library. Computerization of the Technical Assistance modules and materials has not yet been done.

2.8 Objective 8: "Expand its membership base both in Jamaica and in Western New York in order to increase the voluntary/technical assistance resources available to the Partners program in Jamaica and in Western New York."

2.8.1. In January, 1983, the Jamaica Partners membership stood at thirty-nine individual members and eleven corporate members. This has been increased to a total of ninety-eight individual and twenty-eight corporate members to date. Of these the number of life members has risen from 0 in 1983 to eighteen. Recruitment of members became an item of initial focus for both the Board and Executive Director. Initially, each Board member set up a personal goal of identifying and recruiting a minimum of two new members. This goal was met and membership grew as new members then recruited others. Many new members have been attracted as a result of being involved as recipients of PAVTAS technical assistance. Procedures for acceptance of new members require sponsorship on the part of at least two Board members with general approval of all Board members. A small membership fee is charged. PAVTAS-related services to members include newsletters

as well as information related to technical assistance activities and Skills Bank development. In addition, JA Partners plans to conduct four membership meetings per year, including:

- two general meetings
- one briefing meeting for new members
- one PAVTAS awards ceremony*

*(The PAVTAS Award Ceremony is a meeting of all members at which individuals from the Skills Bank who have volunteered time and services are awarded Certificates of Appreciation for their efforts. One such ceremony has been conducted to date.)

2.8.2. Membership in Western New York Partners currently stands at thirty-eight individual members and two corporate members. This is an increase from a total of eighteen individual members in October, 1984. Recruitment has been primarily a result of networking on the part of the Executive Director and committees since October, 1984. WNY has plans for a June Membership drive campaign. They are striving to reach the PAVTAS goal of 100 individual members by October 1985.

2.9 Objective 9: "Develop and Information Exchange Service among other Caribbean and Latin American Partnerships."

2.9.1. In Jamaica little progress toward achieving this objective has been made to date. Members of the Board have attended conferences related to networking with Caribbean and Latin American Partnerships (e.g. January, 1983, Caribbean Partners Conference in Barbados). Reports from these conferences indicate that there is a potential for development of information exchanges but there seems to be little general interest at this time to move beyond the discussion stage. Most partnerships in the region hold the concept of networking as of secondary priority to needs which they consider more immediate and directly related to fulfillment of their individual goals.

2.10 Objective 10: "Publish a quarterly newsletter for dissemination within and without Jamaica."

2.10.1 Jamaica Partners decided to publish a newsletter semi-annually rather than quarterly. This decision was prompted by the following considerations:

- The production costs were high for each newsletter relative to the annual membership fees;
- There was a perceived need to produce a quality, substantive newsletter which increased the amount of time necessary to produce each issue; and
- The initial low-level of Technical Assistance activities did not justify a high frequency of publication.

2.10.2 In Jamaica, three newsletters have been published to date: in January, 1984; July, 1984; and January, 1985. Distribution of newsletter has been as follows:

To all membership (corporate and individual)

To Skills Bank Volunteers

To associated agencies

To all Board and Committee members

To WNY (100 copies for distribution there)

To NAPA in Washington, D.C.

To Partners representative in other Caribbean countries

Member reaction to newsletter has been positive. They are comfortable with the existing format and frequency. JA Partners anticipate the possibility of increasing the frequency of publication to four times per year as membership increases and more staff time is made available through the utilization of the computer.

2.10.3. In Western New York, one newsletter has been published to date, in March, 1985. WNY intends to publish another in June, 1985. They intend to publish a newsletter every four months. Distribution of the first newsletter consisted of a mass mailing to the general membership in the United States and 100 copies to JA for distribution by the JA office.

~~2.11 Objective 11: "Develop and conduct a publicity and promotional program of PAVTAS activities in Jamaica and in Western New York."~~

2.11.1 Jamaica Partners began its publicity and promotion of PAVTAS in 1982 with an initial press release announcing award of the PAVTAS funds. This was followed by a long period of low-level publicity until March, 1984. A planned, multi-media program was then launched. The program was designed with the assistance of a Skills Bank Volunteer in the public relations field. Publicity and promotion have taken place through the following media:

Newspapers

Radio

Newsletters

General Membership Meeting

Television

Brochures

Social Functions

Technical Assistance Workshops

The decision not to become intensively involved in publicity prior to March, 1984 was made due to a caution over building public expectations at a time when the program was relatively new and relation with WNY were not clearly defined. The publicity which occurred after March, 1984 has increased the rate of membership recruitment and has stimulated a small amount of donations. Currently, JA Partners is preparing a series of press releases to promote the Skills Bank.

2.11.2. To date in WNY, there have been only minimal efforts to promote and publicize Partners. The Executive Director has initiated efforts at having a feature story done in the local newspapers. Local papers in WNY have been reluctant to see the news value of a human interest story on Partners. WNY hopes to eventually use publicity as an aid to attracting Skills Bank volunteers and potential funding sources.

2.12 Objective 12: "Using funds derived from other than USAID sources, develop and conduct an annual Fund Raising program in Jamaica and in Western New York."

2.12.1. To date, very little progress has been made toward achieving this objective. No funds have been raised in WNY. In Jamaica, all funds raised have been in the form of donations to specific non-PAVTAS projects. In-kind contributions have had only minimal impact on the operating costs of PAVTAS (Chapter 6 contains a detailed examination of donations and in-kind contributions.)

2.12.2. Immediately following the award of the OPG there was a period of low-level activity related to fund raising in Jamaica. This period continued until November, 1984. At that time in Jamaica the Executive Director identified ten potential international aid

agencies and wrote to them requesting information about their grant criteria and funding conditions. In April, 1985, Partners will conduct a PAVTAS Workshop in Fund Raising and Grantsmanship. Volunteers from WNY will serve as technical assistance trainers for that workshop. Jamaica PVOS as well as staff persons from JA Partners will attend the workshop. The Executive Director hopes to apply skills learned in the workshop to help her write proposals for fundings.

2.12.3. In interviews with various Board members and staff, several different perspectives and opinions emerged regarding what to do about fund raising in Jamaica. Some of those suggested approaches and strategies:

- Brokering the services of Skills Bank Volunteers to agencies for a fee;
- Seeking other US Government grants;
- Seeking Jamaica government grants;
- Seeking grants from international development agencies (public and private)
- Marketing the PATH Resource Center;
- Linking with universities abroad to provide student exchanges, study abroad programs, faculty research opportunities; and

- Focusing on sponsorship of community-based education and development projects in an effort to attract funds from development agencies which favor community-based projects.

2.12.4. To date, there have been no planned fund raising activities in WNY. As in the case of JA Partners, there are several different ideas regarding what to do about fundraising. Some of those suggested by staff and Board members include:

- Conducting Jamaican Culture Day or dance shows using volunteers from the Jamaica side;
- Soliciting the aid of local fundraising advisors to assist in developing strategies and presentations for accessing local corporate donations;
- submitting proposals for grants from international corporate funding sources;
- Linking with Universities to provide student exchanges, study abroad programs, and faculty research opportunities; and
- soliciting funds from local civic clubs and foundations.

CHAPTER 3
TECHNICAL ASSISTANCE

3.1 Inventory of PAVTAS Activities

3.1.1. Since January, 1983, Technical Assistance activities have been conducted using PAVTAS funds as follows:

- Technical Assistance Activities	<u>16</u>	Total number conducted to date
	<u>7</u>	Total planned for period Apr. - Oct. '85
- Jamaican PVOS/ Beneficiaries	<u>16</u>	Total number to date
	<u>1</u>	Total additional planned for period Apr. - Oct. '85
- Individual Jamaican Beneficiaries	<u>347</u>	Total number to date
	<u>174</u>	Total planned for period Apr. - Oct. '85

3.1.2. Technical assistance has been provided in the form of workshops, conferences, and one-to-one apprenticeships. It has been conducted both in Jamaica and in Western New York. Following is a list and numerical summary of the types of technical assistance delivered:

- Workshops located in Jamaica and conducted by Jamaica Partners Skills Bank Volunteers	<u>11</u>	Total conducted to date
	<u>3</u>	Total planned for period Apr.- Oct. '85

- Workshops and Apprenticeships located in Jamaica and conducted by WNY Skills Bank Volunteers

3 Total conducted to date
2 Total planned for period Apr. - Oct. '85

- Workshops and Apprenticeships located in Western New York and conducted by WNY Skills Bank Volunteers

2 Total conducted to date
 Total planned for period Apr. Oct. '85

Appendix 3.1 of this report represents a complete list of all PAVTAS funded technical assistance activities conducted since award of AID funds. The Appendix includes a description of beneficiary agencies, location, and number of participants. It also includes activities planned for the period April - October, 1985.

3.2 Requests for Technical Assistance

3.2.1. Procedures in Jamaica

A description of the procedures used by JA/Partners to determine the eligibility of member agencies and approve requests for technical assistance is provided on the chart on the following page.

3.2.2. Procedures in WNY

Following is a brief description of the procedures used in WNY for approving requests from Jamaica for TA:

- Request arrives from Jamaica and is routed to the appropriate committee chairperson for initial approval and consideration of appropriate action;
- If approved, the Request is forwarded to the Board for final approval;
- If disapproved, Jamaica is notified in writing;
- Following Board approval, request returns to committee for design, set-up, and identifying volunteers;
- For Jamaicans coming to WNY, Executive Director provides a briefing upon their arrival;
- For WNY volunteers going to Jamaica, Executive Director provides a pre-departure briefing;
- TA is delivered as planned.

3.2.3. Findings and Suggestions

following is a list of significant findings and brief operational suggestions for improvement:

3.2.3.1 The criteria used by JA/Partners to evaluate and select requests for technical assistance conform to the criteria described in the original document. These criteria are outlined in the sample Member Agency Eligibility Questionnaire provided as Appendix 3.2. This form requires agencies to describe information which will enable JA/Partners to determine the eligibility of the agency and the appropriateness of the request.

3.2.3.2 Since award of the PAVTAS Funds, JA/Partners has approved eligibility, requests for a total of 17 member agencies.

3.2.3.3 In Jamaica, requests are evaluated and approved by a PAVTAS Selection Committee composed of selected key board members, and representatives of relevant Program Committees. A numerical rating scale is used to evaluate the agency and its program. All PVOS must be declared eligible on an agency and program level before their request for technical assistance can be approved. A sample rating scale is provided in Appendix 3.3. While it is possible that organizational or constitutional changes in an agency over time may affect its eligibility status, at present Partners has no system for periodic review of eligibility status. The feasibility and potential value of setting up periodic eligibility review meetings should be explored.

3.2.3.4 The procedures and methods used to approve requests and prepare for delivery of technical assistance have proven to be reasonably efficient and effective in both Jamaica and Western New York. A considerable amount of quality technical assistance has been delivered. However, interviews with Beneficiaries (individual recipients and agency representatives) indicate that there has been a degree of dissatisfaction with the relatively long lapse of time between initial request and delivery of the assistance. In the worst cases, the process has taken up to a year. In the best cases, it has taken several weeks. In some instances, agency representatives commented that they had managed to meet their needs elsewhere in the interim. The significant causes for this include:

- (i) The agencies themselves are sometimes slow in producing the necessary documents required for processing their eligibility.
- (ii) Occasionally, program committees have been slow in fulfilling their role in designing workshops and identifying Skills Bank Volunteers.
- (iii) The pervasive communication problem between JA and WNY inhibited the process of searching for Skills Bank Volunteers on the WNY side of the Partnership for the first two years of the program.
- (iv) Sometimes requests for assistance sent from Jamaica do not contain enough specific information to enable WNY committees to take action without requesting further information. This need for further information can result in the loss of a month due to the slowness of international mail.

3.2.3.5 There is some lack of clarity in both JA and WNY regarding the relative roles of Boards and Program Committees in the request approval process. This sometimes results in delays and duplication of effort. To help reduce the time lapse between request for TA and delivery, the responsibilities and methods of Committees and Boards should be examined and clarified.

3.2.3.6 In approving requests for assistance, in Jamaica there has been a tendency to approve requests from urban-based programs. There has been little activity in the rural areas on the part of PAVTAS. Due to the real need for assistance in rural Jamaica, Partners should make an effort to identify more opportunities to provide assistance in rural areas.

3.2.3.7 The system used to determine the eligibility of an agency in Jamaica involves calculating the score of a group of requests and taking the mean approval. This system promotes competition among agencies. This element of competition could be eliminated by doing away with the mean approach and establishing a standardized minimum score.

3.2.3.8 Many of the agencies which PAVTAS has approved are heavily subsidized by the Jamaica government. In some cases the distinction between private and public organizations has been somewhat difficult to make. The Jamaica Selection Committee has defined a private organization as any that receives not more than 50% of its funds from the government.

3.2.3.9 Jamaicans traveling up to WNY should receive a pre-departure briefing from someone who has had experience in WNY. This would facilitate their rapid adjustment by easing any pre-departure anxiety they might be feeling.

3.2.3.10 It has been occasionally difficult to make clear distinctions in the definition of "for profit" and "not for profit" agencies or groups. Partners and AID should consider expanding the technical assistance acceptance criteria to include small-scale, community-based "for profit" cottage industries.

3.2.3.11 Partners has demonstrated a degree of healthy flexibility in the types of technical assistance which have been provided as well as in the types of Skills Bank Volunteers they have used. They have been successful in designing individualized workshops which meet the needs of requesting agencies while simultaneously remaining true to the criteria and guidelines of the original project document. On the question of selecting Skills Bank Volunteers from WNY, or Jamaica, or both, decisions have been made on the basis of the most immediate availability of qualified persons.

3.3 Delivery and Monitoring

3.3.1 Procedures and Methods

Skills Bank Volunteers deliver the technical assistance in accordance with the plan and design devised during the preparatory stages of the process. Homestays with Jamaican or WNY families are arranged in an effort to enhance the cross-culture learning experience of the Volunteer. Partners monitors the activity and provides logistical and administrative support as needed. In Jamaica photographs are taken of significant activities and in some recent cases, there has been video taping of activities.

3.3.2 Findings and Suggestions

Following is a list of significant findings and brief operational suggestions:

3.3.2.1 Interviews with Beneficiaries indicate a generally high level of satisfaction with the way in which assistance has been delivered and the results achieved. Agencies expressed particular pleasure in the design of activities and the degree of flexibility demonstrated by volunteers and the staff of Partners.

3.3.2.2 Documentation of technical assistance activities has been largely limited to maintaining files of correspondence, schedules, and evaluations. The files are thorough and well organized. Multi-media documentation (recordings and video) has been inhibited in Jamaica due to the fact that Jamaica does not as yet have a complete set of video equipment. Also there is no one on the current JA/Partners staff that is trained to use video equipment effectively. Video taping that has been done was accomplished with the assistance of a JA Skills Bank Volunteer. Photographs have been taken of most workshops.

3.3.2.3 All the TA workshops involved trainers to some extent. In some cases they were a primary element of the design. Most

workshops have involved a mixture of training of trainers and of direct beneficiaries. This approach has enhanced the "multiplier effect" to some degree, while simultaneously addressing the immediate needs of direct beneficiaries.

3.3.2.4 The lengths and time frames of the Technical Assistance activities were generally considered acceptable to both agencies and volunteers. In some cases, a need was identified for follow-up workshops. In addition to the dictates of the scope of work involved, factors which have influenced the decisions regarding the length of various activities have included:

- (i) the minimal amount of time considered appropriate to make a visit from WNY or Jamaica worthwhile.
- (ii) the amount of time that agencies can free up their personnel, and
- (iii) the amount of time that Skills Bank Volunteers can donate.

3.3.2.5 The current filing system in Jamaica contains a thorough, precise, and potentially useful file of all Technical Assistance models and materials. The usefulness of this file as a resource tool for future, similar Technical Assistance activities could be enhanced by creating a topical file of workshop designs and materials. Resource information is currently filed chronologically. It is recommended that these materials be filed by topic, so that they can be retrieved and provided to Skills

Bank Volunteers as models and resources in designing related workshops.

3.4 Evaluation and Follow-up

3.4.1 Procedure and Methods

Following each technical assistance workshop, participants complete a written evaluation of the activity and submit it to Partners. Sample forms are included as Appendix 3.4 Partners summarizes the evaluations and notifies Skills Bank Volunteers and Agencies of the results.

3.4.2 Findings and Suggestions

Following is a list of significant findings and brief operational suggestions:

3.4.2.1 Since the majority of technical assistance to date has been initiated by JA/Partners and has involved Jamaican Skills Bank Volunteers, the mechanism for evaluating that type of activity is currently the most refined. The Form used to evaluate activities in which WNY volunteers go to Jamaica was only recently developed and is still in a draft stage.

3.4.2.2 Interviews with workshop participants indicate that they are satisfied with the evaluation forms used, but have experienced some frustration in feeling that they have had to wait too long to receive the summarized results.

3.4.2.3 JA/Partners has conducted an awards ceremony in which certificates of appreciation have been presented to Skills Bank Volunteers. Representatives of WNY should consider attending the next JA/Partners awards ceremony. If the number of WNY Skills Bank Volunteers increases, it may also be worthwhile to conduct a similar awards ceremony in WNY.

3.5 Skills Bank Volunteers

3.5.1 To date, all of the individuals that have provided services as volunteer trainers have had experience in conducting workshops or doing teaching prior to their association with the PAVTAS Skills Bank. From among recipients interviewed, all but one expressed satisfaction with the level of trainer skills demonstrated by Volunteers. Those volunteers from among the Skills Bank population that have been selected to do workshops have been chosen because it was felt that they possessed expertise in the subject, trainer skills, and cross-cultural sensitivity.

3.5.2 Subject Matter Expertise

To date, individuals selected to serve as Volunteer Consultants have proven to be highly competent and knowledgeable in their fields. In Jamaica, Volunteers are primarily recruited

on the basis of their expertise. All beneficiaries interviewed expressed satisfaction with the level of expertise demonstrated by Volunteer Consultants.

3.5.3 Effectiveness

Beneficiaries interviewed indicate that the majority of the Volunteer Consultants used to date have been successful in achieving the objectives of their workshops. Many of the Volunteers have received requests from workshop participants for follow-up workshops. The Volunteers see these requests as indicators that they have been effective in conducting the PAVTAS Activities. Several Beneficiaries suggested that in the case of WNY Volunteers, effectiveness in conducting activities was a function not only of trainer skills and subject matter expertise, but also cross-cultural sensitivity and awareness of the Jamaican culture.

3.5.4 Findings and Suggestions

To date, there have been no significant problems with the quality and effectiveness of Volunteers from within JA or WNY. Recipients have been generally pleased with Volunteer performance. However, if the number and frequency of technical assistance activities increases in the future, the potential for hurried selection and errors could also increase. In an effort to avoid this possibility, WNY and JA Partners should consider the following suggestions:

- Continue to select Volunteer Consultants on the basis of trainer skills, technical expertise and cross-cultural sensitivity and awareness.
- Provide cross-cultural briefings for WNY Volunteers going South and for Jamaicans going North. Video tapes or slides could be used as valuable resources in conducting these briefings.
- Add an evaluation of trainer skills component to the standard evaluation form and use the results as a means of providing feedback to Volunteers regarding the strength of their trainer skills.
- Consider conducting periodic workshops in Non-formal Education techniques and Adult Learning Theory for selected Skills Bank Volunteers. Other Skills Bank Volunteers with relevant Skills could be used as trainers.

3.6 Impact on Recipients

In interviews with individual recipients and agency representatives, responses indicated a generally high level of satisfaction with the effects of PAVTAS technical assistance. All recipients questioned were able to name at least one operational, procedural, or attitudinal improvement in their agency or in themselves which they attributed to participation in a PAVTAS workshop. The most common attitudinal effect was increased staff motivation. Operational and procedural improvements varied with each case, but generally involved improved planning and/or management practices.

3.6.1 Long Term Impact

There is at present no mechanism for gathering information about the long-term impact of technical assistance on individuals and agencies. A system of Post-Technical Assistance Assessment should be devised and implemented. This could be done by distributing a questionnaire to recipients three (3) months after each technical assistance activity.

APPENDIX 3.1

PAVTAS Technical Assistance Activities
January 1983 - October 1985

<u>DATE</u>	<u>ACTIVITY</u>	<u>BENEFICIARY</u>	<u>CONDUCTED BY/ PLACE</u>	<u># OF BENEFICIARIES</u>
June '83	Introductory Workshop in Organizational Development	PAVTAS Agencies*	JA/Jamaica	18
Sept. '83	Project Management Workshop	PAVTAS Agencies*	JA/Kingston	20
Nov. '83	Personnel Management Workshop	PAVTAS Agencies*	JA/Kingston	31
Jan. '84	Public Relations & Communications Workshop	PAVTAS Agencies*	JA/Kingston	21
Mar '84	Financial Manage- ment Workshop	PAVTAS Agencies*	JA/Kingston	20
May '84	Office Protocols Workshop	PAVTAS Agencies*	JA/Kingston	35
May '84	Organization & Economic Development Planning	Enos Buckley LeRoi Lorde	WNY/Western New York	2
July '84	Inter-Agency Communication Staff/Management Relations	MICO C.A.R.E. Centre	JA/Jamaica	20
Sept. '84	Guidance/ Counselling (J. Moriah)	Girls Town	JA/Jamaica	7

APPENDIX 3.1

PAVTAS Technical Assistance Activities
January 1983 - October 1985
(CONTINUED)

DATE	ACTIVITY	BENEFICIARY	PLACE	BENEFICIARIES
Oct. '84	Department Grooming Programme For Hope Child Care Staff	Hope child	JA/Jamaica	15
Nov. '84	Marketing and Promotion of Arts	Cultural Training Center Schools	JA/Jamaica	71
Jan. '85	Media Training Programme (Berggren/Rusch)	3 C.T.C. Schools	WNY/Jamaica	15
Jan. '85	Dye Extraction	C. Hamilton	JA/WNY	1
Jan. '85	4-H Program Development Culture & Recreation	JA. 4-H Clubs	JA/Jamaica	20
Feb. '85	Curriculum Development for the Blind (Fuffino/Balon)	Salvation Army	WNY/Jamaica	20
Mar. '85	Career Guidance for The Deaf (J. Moriah)	JA Assocn. for the Deaf	JA/Jamaica	18
April '85	Fund raising/ Grantsmanship Seminar	PAVTAS Agencies*	WNY/Jamaica	30
Tentative	Packaging/Design Exposure	Jamaica Womens League	WNY/WNY	2
Tentative	Marketing for Forums	Ja. 4-H Clubs	WNY/Jamaica	30
June '85	Supervisory Management Training	Jamaica Womens League	JA/Jamaica	15

APPENDIX 3.1

**PAVTAS Technical Assistance Activities
January 1983 - October 1985
(CONTINUED)**

DATE	ACTIVITY	BENEFICIARY	PLACE	BENEFICIARIES
June '85	Culture Administration Workshop Evaluation	Culture Trng. Center Schools (4)	JA/Jamaica	70
Tentative	Inter-Agency Communication Assesmt. Process	Girls Guides Association	JA/Jamaica	25
Tentative	Media Training Follow-up	Cultural Trng. Center Staff	WNY/WNY	2

***PAVTAS Agencies=**

MICO C.A.R.E.

Jamaica School of Art

Jamaica School of Drama

Jamaica School of Music

Jamaica School of Dance

Hope Child Care Centre

4-H Clubs Advisory Council

Jamaica Association for the Deaf

St. Catherine E.S.P.

J.A.C.L.D.

Girls Town

Allsides Workroom

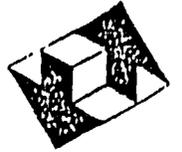
Girls Guides Association

Jamaica Partners

Y.W.C.A.

MICO College

Jamaica Women's League



JAMAICA-WESTERN NEW YORK PARTNERS OF
THE AMERICAS

VOLUNTARY TECHNICAL ASSISTANCE SERVICE
(PAVTAS)

MEMBER AGENCY ELIGIBILITY ASSESSMENT
QUESTIONNAIRE

AGENCY _____
ADDRESS _____
_____ TEL. NO. _____
CONTACT PERSON: _____
TITLE: _____
TEL. NO. : _____
COMPANY REGISTRATION NO: _____
DATE OF REGISTRATION: _____

MEMBER AGENCY ELIGIBILITY ASSESSMENT

1. Agency is non-share capital,
not-for-profit company

YES	<input type="checkbox"/>
-----	--------------------------

NO	<input type="checkbox"/>
----	--------------------------

OR

Agency is division of recognized
organization engaged in
humanitarian/philanthropic
endeavours

YES	<input type="checkbox"/>
-----	--------------------------

NO	<input type="checkbox"/>
----	--------------------------

2. Agency's objectives are:

Educational	<input type="checkbox"/>	Social	<input type="checkbox"/>	Cultural	<input type="checkbox"/>
Charitable	<input type="checkbox"/>	Development Assistance			<input type="checkbox"/>

Comments _____

3. Number of clients served in
one year

0 - 49

50 - 99

100 - 249

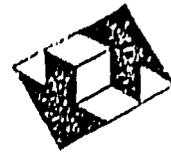
250 - 449

500 plus

4. Clients served are in a:

(i) Rural location _____%

(ii) Urban location _____%



5. Income Group: Lower %
 Middle %
 Upper %

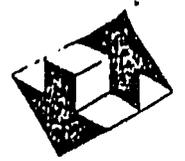
- Age Group 0 - 5 %
 6 - 14 %
Sex
 Male % 15 - 21 %
 Female % 22 - 45 %
 46 - 60 %
 60 and over %

6. Agency is partisan and/or political. YES NO

7. Agency is engaged in a trade union-type activity. YES NO

8. Agency has a governing body or management committee. YES NO

9. (a) If yes for no. 8, what is the frequency of their meetings: Once a week
 month
 quarter
 Year



(b) What is meeting schedule for the next 6 months?

10. Agency has agreed to develop an annual operations plan showing anticipated benefit of PAVTAS. YES NO

If no, explain why not: _____

11. Agency has submitted financial requirements to support request for voluntary technical assistance. YES NO

Current operational budget:-

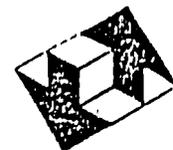
Last 2 Annual Reports:-

12. What are your sources of funding:

Government %

Other Agencies %

Services income %



PROGRAMME ELIGIBILITY ASSESSMENT

1. Agency provides a service classified within the following generic areas:

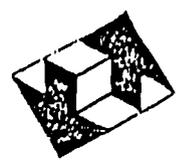
- | | |
|---|--|
| Agriculture | |
| Culture | |
| Education | |
| Medicine | |
| PATH Applied Technology for the Handicapped | |
| Small Business | |
| Women in Development | |
| Tourism | |
| Sports | |

2. Agency's objective is to achieve:

- | | |
|---------------------------------|--|
| Employment Opportunity Creation | |
| Marketable Skills Development | |
| Preventative Intervention | |

3. Agency seeks to benefit persons within one or more of the following categories:

- | | |
|-------------|--|
| Women | |
| Youth | |
| Handicapped | |



TECHNICAL ASSISTANCE REQUEST

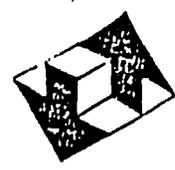
1. In order of priority, agency identifies technical assistance as being necessary in the following areas:

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____

2. If Management/Organizational development needs are identified in no. 1, which of the following sub-categories apply? (List priority order: 1 - high, 2 - mid, 3 - low).

<u>Personnel Development:</u>	<u>Priority</u>
- Staff supervision	
- Group Dynamics	
- Leadership Skills	
- Decision making/Problem solving	
- Staff Training	
- Other (please explain): _____	

<u>Public Relations:</u>	<u>Priority</u>
- Fundraising	
- Grantsmanship	
- Marketing	
- Membership motivation	
- Membership development	
- Other (please explain): _____	



Accountancy:

Priority

- Financial Reporting
- Budget and Control
- Book-keeping
- Stock-taking

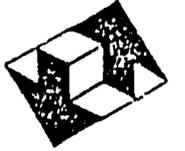
Communications Skills:

- Report Writing
- Letter Writing
- Diction and Speech/Telephone skills
- Business English
- Interviewing/Counselling
- Other (please explain): _____

Office Protocols:

Priority

- Filing
- Typing
- Shorthand
- Minute taking
- Deportment & Grooming
- Arrival times
- Handling of public
- Other _____



Project Development and Management:

Priority

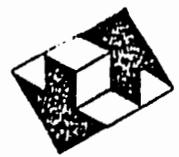
- Feasibility/Research into viability
- Project proposal development
- Monitoring and Evaluation
- Programme Development
- Other _____

Legal Affairs:

Priority

- Procedures for Registering a Company (PVO formation)
- Procurement of Licences/Tax Exemption, Tax Deductibility, Duty Free Status
- Other categories (please explain):

3. Specify exact nature of non-management needs identified in no. 1.



(a) The non-management technical assistance request will be reviewed/serviced by the following committee/committees:

Agriculture

Small Business

Culture

Women in Development

Education

Tourism

Medicine

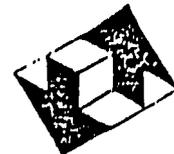
Sports

PATH

What staff development/training programmes have agency staff been exposed to over the last two years:

5. Indicate the total number of staff persons identified to receive technical assistance: _____

(a) What percentage of the total staff do persons identified in 5 represent: _____%

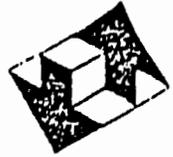


(b) Indicate the technical assistance needs perceived for the following categories of staff identified in 5:

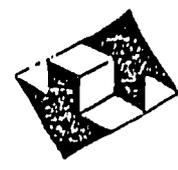
Category	Need Identified	% of staff	Priority rating: 1-high, 2-mid, 3-low
Board Members			
Senior Management			
Middle Management			
Staff			
Secretarial/ Clerical			
Ancillary/Support			

(c) Indicate academic levels of staff identified in (b).

Category	Tertiary (Techni- cal & University)	Secondary	Primary
Board Members			
Senior Management			
Middle Management			
Staff			
Secretarial/ Clerical			
Ancillary/Support			



6. State any times which would be inconvenient for consultants to be present in agency or any times which would be inconvenient for recipient staff (e.g. scheduled programme activities):



AUTHORIZATION

I declare that all the above information is accurate to the best of my knowledge and do request and authorize Jamaica-Western New York Partners to proceed in their search for appropriate Technical Assistance to fulfil the needs identified herein.

Signed: _____
Title: _____
Tel. No.: _____

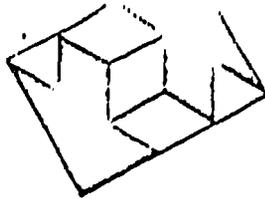
Date: _____

Interview conducted by:

Date

Date

PARTNERS
OF THE AMERICAS



Jamaica/Western New York Partners
2a Ruthven Road, Kingston 10, Tel: (809)-92-93340/1
Jamaica, West Indies.

JAMAICA - WESTERN NEW YORK PARTNERS

VOLUNTARY TECHNICAL ASSISTANCE SERVICE

MEMBER AGENCY ELIGIBILITY CRITERIA RATING SCALE

(Yes scores 5, No scores 0)

1. Agency is a registered, non-share capital, not-for-profit company with educational, social, culutral or charitable objects.

OR Agency is a subsidiary or a division of a recognized organization engaged exclusively in educational, social, cultural, charitable, or development assistance activities.

2. Agency serves at least 100 clients or persons directly.

3. Agency has at least 55% of the clients or persons served directly drawn from among low income groups.

4. Agency demonstrates its financial need/
inability to pay for the technical assistance to be rendered. This need

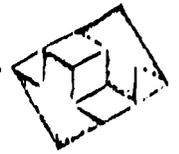
YES	NO



identified through an audit or an examination of agency accounts by PAVTAS selection committee personnel.

- 5. Agency demonstrates its capability or potential of managing its affairs in an acceptable, business-like manner.
- 6. Agency is not a political organization nor affiliated with a political organization nor engaged in any activities which would make it a political organization.
- 7. Agency is not engaged in any activities which would make it a trade union.
- 8. (a) Agency has a governing body or management committee
OR
(b) Agency agrees in writing to have governing body or management committee with a regular meeting schedule.

YES	NO



9. (a) Agency has an annual plan showing how the technical assistance rendered by FAVTAS will assist the organization to achieve its short and long term objectives.

(b) Agency has agreed to develop (a).

YES	NO



PAVTAS

PROGRAM REVIEW CRITERIA RATING SCALE

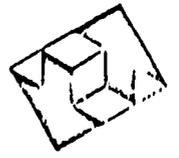
A. What are the principal objectives of the agency?

B. What are the principal objectives for which assistance is being sought?

	LOW			HIGH	
	1	2	3	4	5
1. To what extent have the program objectives been clearly defined?					
2. To what extent have the objectives been stated in measurable or observable terms?					
3. To what extent do the program's objectives support the overall stated objectives of the agency?					

LE

	LOW			HIGH	
	1	2	3	4	5
4. To what extent do program objectives fall within or support identified development strategies or priorities for Jamaica?					
5. How appropriate is the TA request to the program objectives as defined?					
6. How appropriate is the technical assistance request to the educational background, skills or experience of the agency's personnel?					
7. How feasible is the technical assistance request given the size of staff identified for training?					
8. To what extent is this program unique in Jamaica?					



	LOW			HIGH	
	1	2	3	4	5
9. To what extent is this program complementary to others in Jamaica?					
10. What is the likelihood that this agency/organization will be able to carry out (or improve) the delivery of the services etc. for which it received T/A.					
11. To what extent do the program objectives support PAVTAS objectives.					



MEMBER AGENCY TECHNICAL ASSISTANCE
REQUEST ASSESSMENT

Date of interview: _____

Date of assessment: _____

- 1. Agency Eligibility Score (Maximum 45)
- 2. Program Eligibility Score (Maximum 55)
- Total ----- (Maximum 100)

Recommendation:*

Members of Review Committee:

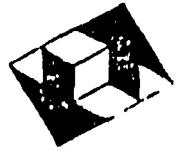
- 1. _____ 4. _____
- 2. _____ 5. _____
- 3. _____ 6. _____

Date: _____

*If T.A. refused, reasons must be stated
under recommendation.

JAMAICA/WESTERN NEW YORK PARTNERS

VOLUNTARY TECHNICAL ASSISTANCE SERVICES
(PAVTAS)



CAREER GUIDANCE WORKSHOP

WORKSHOP EVALUATION QUESTIONNAIRE

PLEASE COOPERATE WITH US BY COMPLETING THIS FORM

At the end of each day, we ask that you complete the appropriate section relating to that session.

At the end of the Workshop on April 18, 1985, we ask you to hand in a completed form.

If you do not attend ALL Workshop Sessions, please still evaluate the sessions you do attend.

Your signature to this evaluation is welcomed, but not required.

YOUR COOPERATION IS GREATLY APPRECIATED.

SESSION 1

"EXPECTATIONS - GUIDANCE - VOCATIONAL CHOICEMAKING"

Presenter: Sonja-Jacqueline Moriah - Education Officer "

Date & Duration: Wednesday 6th March, 1985 - 9 a.m. - 12:30 p.m.

1. Did you arrive with specific expectations for this workshop?
If so, explain briefly:

1. How did you rate the following?
(O = Outstanding; VG = Very Good; G = Good; F = Fair; U = Unsatisfactory)

- a. Content of presentation (i.e. factual information)
- b. Opportunities for group discussion and exchange.
- c. Opportunities for individual participant contribution.

	O	VG	G	F	U
a.					
b.					
c.					



d. Supporting materials (hand-outs, visual aids, etc)

e. The pace of the session.

O	VG	G	F	U

3. To what extent were your expectations fulfilled?

Expectations were

Exceeded	Entirely	To a certain extent	Little	Not at all

Explain briefly:

4. If you had the opportunity, would you be able to implement anything gained from this course? If so, what specific area(s) would you implement?

5. Have you any additional comments or recommendations to make about this session generally. (This is vital as it assists us to be better prepared to serve your organization in the future).

SESSION 11

"HELPING SKILLS OF FACILITATION"

Presenter: Miss Sonja Jacqueline Moriah, Education Officer

Date & Duration: Wednesday, 20th March 1985, - 9 a.m. - 12:30 p.m.

- 1. Did you arrive with specific expectations for this workshop?
If so, explain briefly:

- 2. How did you rate the following?
(O = Outstanding; VG = Very Good; G = Good; F = Fair;
U = Unsatisfactory)

- a. Content of presentation (i.e. factual information)
- b. Opportunities for group discussion and exchange.
- c. Opportunities for individual participant contribution.
- d. Supporting materials (hand-outs, visual aids, etc.)
- e. The pace of the session.

O	VG	G	F	U

- 3. To what extent were your expectations fulfilled?

Expectations were

Exceeded	Entirely	To a certain extent	Little	Not at all

Explain Briefly:



4. If you had the opportunity, would you be able to implement anything gained from this course? If so, what specific area(s) would you implement?

5. Have you any additional comments or recommendations to make about this session generally. (This is vital as it assists us to be better prepared to serve your organization in the future).

SESSION 111

"WHAT WOULD I LIKE TO WORK WITH MOST"

Presenter: Miss Sonja-Jacqueline Moriah, Education Officer

Date & Duration: Wednesday, 27th March, 1985 9a.m. - 12:30 p.m.

1. Did you arrive with specific expectations for this workshop? If so, explain briefly:

2. How did you rate the following?
(O = Outstanding; VG = Very Good; G = Good; F = Fair; U = Unsatisfactory)

- a. Content of presentation (i.e. factual information).
- b. Opportunities for group discussion and exchange.
- c. Opportunities for individual participant contribution.

	O	VG	G	F	U
a.					
b.					
c.					



d. Supporting materials (hand-outs, visual aids, etc)

O	VG	G	F	U

e. The pace of the session.

3. To what extent were your expectations fulfilled?

Expectations were

Exceeded	Entirely	To a certain extent	Little	Not at all

Explain briefly:

4. If you had the opportunity, would you be able to implement anything gained from this course? If so, what specific area(s) would you implement?

5. Have you any additional comments or recommendations to make about this session generally. (This is vital as it assists us to be better prepared to serve your organization in the future).



SESSION IV

**"VISIONS OF A LIFESTYLE" - GOALSETTING,
PLANNING, ACTION STRATEGY**

Presenter:

Miss Sonja-Jacqueline Moriah - Education Officer

Date & Duration:

Wednesday, April 18th, 1985 9 a.m. - 12:30 p.m.

1. Did you arrive with specific expectations for this workshop?
If so, explain briefly:

2. How did you rate the following?
(O = Outstanding; VG = Very Good; G = Good; F = Fair;
U = Unsatisfactory)

- a. Content of presentation (i.e. factual information)
- b. Opportunities for group discussion and exchange.
- c. Opportunities for individual participant contribution.
- d. Supporting materials (hand-outs, visual aids, etc.)
- e. The pace of the session

O	VG	G	F	U

3. To what extent were your expectations fulfilled?

Expectations were

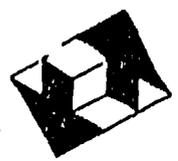
Exceeded	Entirely	To a certain extent	Little	Not at all

Explain briefly;



4. If you had the opportunity, would you be able to implement anything gained from this course? If so, what specific area(s) would you implement?

5. Have you any additional comments or recommendations to make about this session generally. (This is vital as it assists us to be better prepared to serve your organization in the future).



JAMAICA/WESTERN NEW YORK PARTNERS OF THE AMERICAS
EVALUATION OF TECHNICAL ASSISTANCE RENDERED

A. Agency/Committee Reporting (delete as applicable): _____

Address: _____

Name(s) of Volunteer(s): _____

Address(es) of Volunteer(s): _____

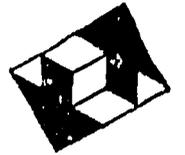
Direction of Travel: North - South South - North

Title of Programme: _____

Dates of Volunteer(s) Visit: _____

B. What were the Main Goals/Objectives of the Programme? (For questions B through E add pages if necessary)

C. What were the principle Activities of the Programme?



D. To what extent were the Programme Objectives achieved?

Objectives were Exceeded	Entirely	To a certain extent	Little	Not at all

Explain briefly:

E. What were the results/outcomes of the programme, if any, (e.g. follow-up, return visit, etc.)

F. Have you any additional comments or recommendations to make about this programme generally? (This is vital as it assists us to better serve your agency in future).

Person(s) completing this form: _____
(Please print)

c.c. Executive Director, Ja/WNY Partners
Executive Director, WNY/Ja Partners

(Signature, Relevant Committee Chairperson)

(Date)

CHAPTER 4

SKILLS BANK

4.1 Development

4.1.1 The Skills Banks in both Partners have developed encouragingly rapidly. The Table below shows their development since January 1983.

TABLE 4.1 - SKILLS BANKS GROWTH 1983-1985

<u>TIME</u>	<u>WEST. NEW YORK</u>		<u>JAMAICA</u>	
	<u>INDIVIDUAL</u>	<u>CORPORATIONS</u>	<u>INDIVIDUALS</u>	<u>CORPORATIONS</u>
Jan. 1983	0	-	6	1
June 1983	0	-	16	5
Dec. 1983	0	-	30	5
June 1984	0	-	50	6
Dec. 1984	22	-	66	6
March 1985	66	-	77	6

4.1.2 The rate of growth in WNY has been quite phenomenal. Over the first six months of participation in the PAVTAS Project they have succeeded in recruiting sixty-six Volunteers to the programme. In Jamaica, the rate of growth, though less spectacular, has nonetheless been rapid.

4.1.3 In both branches many Volunteers are persons who, having been asked to serve, either ask or agree to be registered as Volunteers. On a number of occasions persons have requested to be registered on their own volition.

4.2 Composition

4.2.1 Table 4.2 below shows a wide variety of disciplines and interests.

	<u>DISCIPLINE OR INTEREST</u>	<u>WNY INDV.</u>	<u>JAMAICA INDV.</u>	<u>CORP.</u>
f)	Project Management/Evaluation	-	5	1
fi)	Small Business	17	6	1
iii)	Legal Affairs	1	3	-
iv)	Ind. Relations/Personnel Management	-	11	1
v)	Marketing/Promotion/Public-Relations/ Fund Raising	-	6	-
vi)	Research/Planning	-	2	-
vii)	Production/Construction Management	-	3	-
viii)	Secretarial Services/Office Protocol	-	3	1
ix)	Financial Management	2	3	2
x)	Agriculture	-	1	-
xi)	Community Development	-	8	-

xii)	Culture	-	14	-
xiii)	Emergency Preparations	1	6	-
xiv)	Health (Medical)	13	5	-
xv)	Path	11	2	-
xvi)	Sports	4	2	-
xvii)	Women In Dev.	-	1	-
xviii)	Community Education	9	-	-
xiv)	University Linkage	2	-	-

4.2.2 The project document has as one of its objectives the "pairing" of Volunteers to render Technical Assistance. The numbers in Table 4.2 make this impossible in some cases.

4.2.3 Pairing of Volunteers may mean the simultaneous matching of like expertise from both branches, but it may also connote the matching of complementary skills. On the other hand pairing need not be taken to mean that both individuals in a pair are activated at the same time. Pairs could grow over time, whether in like or in complementary skills.

4.2.4 For a number of reasons, principally the difficulties associated with the OPG negotiations, Jamaica has been using its own Volunteers for its workshops and seminars. Western New York has geared itself and is now ready for the pairing of teams.

4.3 Contributions of Skills Bank

The contributions of the Skills Bank have been rather uneven. This is due to the fact that this part of the project did not become operational in Western New York until October 1984.

4.3.1 Since the beginning of the OPG the following have been achieved.

	<u>West. New York</u>	<u>Jamaica</u>
i) Programs Completed	1	19
ii) Agencies Benefitted	1	16
iii) Number of Direct Participants	1	347
iv) Number of Volunteers	-	52
v) Estimated Volunteer Hours	-	620
vi) Estimated Value (J\$) of Volunteers Services		\$62,000

4.4 Projection For Development

In both areas there is clear indication of a reservoir of skills from which to draw.

4.4.1 There are some eighteen universities and colleges in and around the Western New York area. In addition, this has been a traditional industrial area. The Executive Director explains that she could, within a short time, get a very large number of

persons in the Bank, but this would not be wise. The Skills Bank should grow at a rate compatible with the growth of the program.

4.4.2 In Jamaica, the Partners program has been gaining in popularity and although the growth trend in Volunteers has been declining since June 1984, there is reason to believe that there are still many more persons who are willing to be volunteers.

4.4.3 The end of project goals and the planned workshops and seminars based on requests for technical assistance can be met from the resources of the Skills Banks.

CHAPTER 5

END OF PROJECT CONDITIONS

5.1 Status Report

The table below represents an analysis of the achievements of the Partners in relation to the end of Project conditions contained in the original project document. (An explanation of factors which have acted as constraints to the full achievement of End of Project conditions is included in 5.2)

<u>END OF PROJECT CONDITION</u>	<u>CURRENT STATUS</u>	<u>RESULTANT LEVEL OF ACHIEVEMENT</u>
1. Establish operational office with Executive Director and Secretary	JA: Staff and office on stream Jan. 83	fully achieved
2. Develop operational Skills Bank of at least 20 paired N/S TA	JA: 77 Individ. Mem. 6 corp. Mem. WNY: 66 Individ. Mem.	partially achieved
3. Minimum of 20 agencies having received TA	16 recipient Agen. to date * 1 recipient Agen. pending for April to Oct. '85	partially achieved

END OF PROJECT CONDITION	CURRENT STATUS	RESULTANT LEVEL OF ACHIEVEMENT
4. Increase membership to min. of 100 individual and 25 corporate members in both WNY and JA.	JA: 98 Individ. to date 28 Corps. to date WNY: 38 Individ. to date 1 Corp. to date	partially achieved
5. Design annual operational plans for JA and WNY.	Three plans developed covering period through Sept. 30, '85	fully achieved
6. Establish information base of TA activities in print and electronic media	Printed TA materials on file in JA	minimal progress
7. Quarterly Newsletters published in each of year 1-3	JA: Published 3 semi-annual to date WNY: Published 1 to date	partially achieved
8. Devise strategies for continuation after conclusion of AID Funds	No definite strategies in place. Development is in the idea stage. (see chpt. 2.12)	minimal progress

END OF PROJECT CONDITION	CURRENT STATUS	RESULTANT LEVEL OF ACHIEVEMENT
9. Fund raising resulting in US\$175,000 per annum in cash or in kind.	No funds have been raised in direct support of PAVTAS. The value of in kind contribution has been minimal (see chapter 6)	partially achieved
10. Conduct evaluations and make result accessible.	TA evaluation results on file and available	fully achieved

5.2 Constraints and Factors Affecting Current Status

5.2.1 To varying degrees the difficult relations between WNY and JA Partners during the first two years of the grant, was a significant factor in inhibiting progress toward virtually all stated End of Project conditions. Differing perceptions regarding the role of PAVTAS respective areas of responsibility, and funds distribution resulted in a breakdown in communication between the two Partners. The first two (2) years of the program were characterized by a generally low level of PAVTAS activity on the part of WNY.

5.2.2 Procurement of commodities and equipment for the Jamaica office was prolonged significantly as a result of a reluctance on the part of USAID to commit funds to the project until there was more substantial evidence of the viability of the relationship of JA and WNY Partners and the capability to conduct N-S Technical Assistance activities. Other factors included such restraints as importation regulations and restrictions, and the lengthy nature of standard procurement procedures.

5.2.3 While the number of Skills Bank Volunteers in JA and WNY is far above the target number of twenty (20), the additional concept of paired Skills Bank teams has not been addressed fully. The recruitment of Skills Bank Volunteers in WNY as well as the fostering of the paired teams approach to TA was inhibited largely due to an absence of both an office and Executive Director in WNY. Prior to October, 1984, WNY lacked the staff and infrastructure necessary to recruit and provide volunteers at a rate comparable to JA.

5.2.4 While delivery of technical assistance has been very effective and nearly reached the target of twenty beneficiary agencies, this process was inhibited by the absence of adequate personnel and infrastructure in WNY until October 1984. To a lesser degree, the delivery of TA was also inhibited by:

confusion over the roles of committees and Boards; cumbersome request approval procedures; the slowness of international mail; a lack of sufficient specificity in initial request; and delays on the part of requesting agencies in providing requested documentations.

5.2.5 The primary constraints to the development of an effective computerized information base have been: the late arrival of computer equipment in Jamaica (influenced by delays in the AID procurement process) and the need for computer skills training for the Jamaica staff. In addition, effective multi-media documentation of technical assistance was inhibited due to the fact that Jamaica Partners does not, as yet, have a complete set of video equipment and there is no one on the staff that is experienced with operating audio or video equipment.

5.2.6 The diversity of opinions regarding appropriate fund raising strategies among JA Partners as well as a degree of confusion or lack of clarity regarding roles and delegation of responsibilities relating to fund raising efforts contributed to the low-level of fund raising success in Jamaica.

5.2.7 The absence of an Executive Director and an independent Partners office in WNY inhibited the development and implementation of fund raising efforts on that side of the Partnership.

CHAPTER 6

FINANCIAL RESOURCES AND USES

6.1 The financial resources and expenditures of each Partner will be examined in turn.

6.2 Jamaica Partner Resources

6.2.1 The continued devaluation of the Jamaica dollar has tended to increase the financial resources of that Partner from the OPG.

6.2.2 Overall, from a PAVTAS Budget of US\$400,000, at the end of March, 1985, unspent balance is approximately US\$200,000, which at the fluctuating rates of exchange may convert to somewhere around J\$1,100,000.

6.2.3. The annual income of this Partner has increased from \$28,435 for the two years ending in 1982, to \$197,854 in 1984. Most of this increase derives from the OPG although other sources have shown increases.

Table 6.1
INCOME 1981 - 1984 (J\$)

Income	1981 & 1982	1983	1984
USAID	25,792	99,089	181,150
Subscriptions	1,333	1,560	3,148
Interest	535	1,492	3,792
Rent	775	2,610	3,497
Other	-	1,445	6,267*
Total	28,435	106,195	197,854*

6.2.4 The income statement above does not include sums received for some projects not financed through PAVTAS. Note 'c' of the audited accounts reads:

"(c) Projects in progress:

Monies received for particular projects are treated as projects in progress, less related expenditure, and not taken to revenue."

6.2.5 Income and expenditure statements for these projects appear as Appendices 6.1 and 6.2 at the end of this Chapter. Total revenue for 1984, for example should therefore be increased in Table 6.1 by \$81,262.

6.2.6 Total disbursement from the OPG over the period to the end of the 1984 financial year, amounted to J\$306,031. This, some six months before end of project date, is well below the budget figure of 714,324. (see Appendix 6.3)

6.2.7 Of significance is the fact that the budget figure for income from non-USAID sources of \$13,500 in year 1, and \$36,525 in year 2 were easily surpassed by \$49,893 in year one and \$81,262 in year two.

6.3 Jamaica Partner Expenditure

6.3.1 Data from the Controllers Office indicate that just approximately fifty-percent (50%) of budgeted expenditures has occurred. We will examine expenditures under the headings, i) Staff and ii) Technical Assistance Training.

6.3.2 Total expenditure for the first two years was approximately \$249,800, the original budget figure being \$530,907.

TABLE 6.2

EXPENDITURE 1981 - 1984 (J\$)

EXPENDITURE	1981 & 1982	1983	1984
Staff Related	4,318	43,943	66,097
Rent & Repair	8,660	9,326	9,077
Printing and Stat.	5,507	5,978	9,186
Cables and Postage	91	884	1,302
Seminars & Workshops	-	5,277	6,577
Travel	4,060	19,485	7,339
Tech. Assistance	-	1,582	17,904
Entertainment	5,500	-	-
Advertisement	1,520	-	-
Promotion	214	1,290	1,624
Other	3,252	20,129	27,483
Total	33,122	103,241	146,589

6.3.3 Staff: The original allocation to Personnel was \$46,000 in year I, \$56,650 year II, \$59,725 year III.

6.3.3.1 Whereas the expenditure for the first year was below the original budget figure for the second year the reverse occurred and will be much larger for the third year.

6.3.3.2 The differences are accounted for by the fact that amendments to the budget have allotted for the addition of a Special Assistant, Secretary to the Board and Programme Assistant as paid posts.

6.3.4 Technical Assistance should have accounted for \$58,000 in year I and \$116,500 in year II. This item includes:

- a) Technical Assistance Travel
- b) TA Hospitality
- c) Workshops and Seminars, and
- d) Training Materials

6.3.4.1 Expenditure in the first year of the project life amounted to \$8,387 and in the second to \$27,933.

6.3.4.2 The level of performance reflects a virtual breakdown of relationship between the partners as far as the PAVTAS project was concerned. Since 1983 there were at least six and in 1984 twelve exchanges between the partners on non-PAVTAS projects.

6.3.4.3 Every effort must now be made to rectify the unsatisfactory situation.

6.4 Financial Management Achievements

6.4.1 Chapters 2 and 3 indicate that many of the objectives of the project have been achieved.

6.4.2 In particular, in-kind contributions by Volunteers of an estimated \$62,000 is significant. (see chap. 4.3.2). In addition the level of fund raising for project purpose has been raised from \$25,434 in 1982 to \$65,000 in 1984.

6.4.3 Nevertheless, the Administration has fallen short of the fundraising target, and indeed there has been no positive effort to achieve the targets set in the budget. This aspect of its operation must receive highest priority if the recommended extension is to succeed.

6.5 Western New York Resources

6.5.1 Western New York Partners has completed only six months of participation in the PAVTAS project. Previously, no proper accounts were kept, and so there are no audited accounts to date.

6.5.2 Since October, 1984, a proper accounting system has been established and accounts are being maintained admirably. At the end of March 1985, there was a balance in the bank of US\$9,010.00.

6.5.3 Income for the programme so far has been:

NB* (In this part of the Chapter all sums will be expressed in US\$)

USAID	(US)\$ 42,730
PATH	670
NAPA	500
Fees	<u>579</u>
Total	\$ 44,479

6.5.4 With monthly expenditure averaging \$4,000 and all needed equipment having been installed, there is no need for any further capital expenditure in the immediate future.

6.5.5 Because technical assistance activity within PAVTAS project has been below acceptable levels, an indicative budget was asked for and provided by the Executive Director (at short notice) showing what levels of expenditure might be with a seventy-five percent (75%) increase in activity (Table 6.3)

6.5.6 Projections indicate that at a suitably increased level of activity, the budget allocation to Western New York is likely to be inadequate.

6.5.7 Fund-raising needs to be addressed, but this will not be possible until the Executive Director has a staff that makes it possible for her to devote some of her time to this.

6.5.8 This evaluator was told that Western New York can support an annual budget of between \$75,000 and \$150,000 from locally raised funds.

TABLE 6.3

ACTUAL AND PROJECTED EXPENDITURE (OCT. 1984 - SEPT. 1985)

WESTERN NEW YORK - JAMAICA PARTNERS

EXPENDITURES OF OPG/PAVTAS

<u>EXPENDITURES</u>		<u>6 month</u>	<u>Proj. Exp.</u>	<u>Proj. Exp.</u>	<u>Proj. Exp.</u>
<u>ACCT.#</u>	<u>LINE ITEM</u>	<u>Oct. - Mar</u>	<u>Apr-Sept. 85</u>	<u>Apr-Sept.</u>	<u>Oct. - Sept.</u>
		<u>Actual Exp.</u>	<u>Curr. Lev. Act.</u>	<u>Elev. Lev. Act.</u>	<u>85-86 Elev. Lev. Act.</u>
500	Ex. Dir.	12,300.00	12,300.00	12,300.00	26,200.00
501	Secretary	2,922.00	3,000.00	6,825.00	*20,059.00
502	Fringe Bnft.	1,584.04	1,500.00	5,500.00	9,000.00
510	T.A. (S-N)	-0-	1,200.00	3,000.00	6,000.00
512	JA Trainee Gd.	500.65	750.00	1,200.00	2,000.00
515	Dir. Travel	1,134.25	800.00	1,000.00	2,000.00
519	T.A. (N-S)	(2,047.74)	(3,500.00)	(5,200.00)	(10,800.00)
520	Train. Mat'l	41.33	50.00	100.00	500.00
530	Rent	1,628.00	1,400.00	1,400.00	3,300.00
531	Telephone	1,270.57	1,000.00	1,200.00	3,000.00
532	Auto Exp.	336.75	300.00	600.00	1,500.00
534	Mat'l/Supp.	1,354.82	150.00	2,000.00	3,000.00
535	Stat./Print.	784.62	700.00	2,000.00	2,000.00
536	Postage	437.34	500.00	1,000.00	2,000.00
537	Office Rep.	47.00	-0-	500.00	500.00
538	Equip. Rental	150.00	90.00	500.00	500.00
540	Advertising	200.78	-0-	100.00	200.00
550	Insurance	150.94	-0-	700.00	1,700.00
552	Legal Fees	-0-	-0-	-0-	-0-
554	Acct. Fees	-0-	-0-	500.00	600.00
556	Board/Off. Trav.	1,066.52	1,500.00	2,000.00	3,000.00

TABLE 6.3

ACTUAL AND PROJECTED EXPENDITURE (OCT. 1984 - SEPT. 1985)

WESTERN NEW YORK - JAMAICA PARTNERS

EXPENDITURES OF OPG/PAYTAS

(CONTINUED)

EXPENDITURES		6 month	Proj. Exp.	Proj. Exp.	Oct. - Sept.
ACCT.#	LINE ITEM	Oct. - Mar	Apr-Sept. 85	Apr-Sept.	85-86 Elev.
		Actual Exp.	Curr. Lev. Act.	Elev. Lev. Act.	Lev. Act.
120's	Commodities	6,330.95	-0-	2,000.00	2,000.00
245	Interest to USAID	(1,382.13)	-0-	-0-	-0-
	Exp. (N-S) travel			1,000.00	2,000.00
	Contingency			1,000.00	1,500.00
	TOTALS	\$32,240.56	\$25,240.00	\$46,425.00	\$92,090.00

*Asst. Prog. - Director Full-Time

Secretary - Part-Time

JAMAICA/WESTERN NEW YORK PARTNERS

JOB DESCRIPTION

Job Title: EXECUTIVE DIRECTOR (Jamaica Partners)

1. Reports to: The Board of Directors through the Chairman, or any other person or sub-committee designated by the Board.

2. Principal Accountabilities: This position is accountable for carrying out policy decisions of the Board and for developing and maintaining an operational program which will meet the administrative, program and professional volunteer requirements of the organization, including those of the Partners Voluntary Technical Assistance Service (PAVTAS)

3. Duties:
 1. Handle the day to day operational requirements of the Jamaica/Western New York Partners office, including the requirements for managing the Partners Voluntary Technical Assistance Service (PAVTAS).
 2. Attend all regular, special or extraordinary meetings called by the Board of Directors.
 - * 3. Keep the Minutes of these meetings for inclusion in the organization's Minute Book.

4. Respond to correspondence or other inquiries regarding the organization, its functions or services, as may be required.
5. Maintain regular communication by telephone or in writing with program committees of the organization, beneficiary organizations of PAVTAS, counterpart committees in Western N.Y. and with NAPA in Washington D.C.
6. Plan and co-ordinate volunteer Partners travel to and from Jamaica, including the maintenance and management of a hospitality, or home stay roster for volunteers coming to Jamaica.
7. Develop, produce and distribute a monthly newsletter
8. Write and distribute press releases to further develop the organization's newsworthiness.
9. Assist generally in the development and execution of fund raising, public relations and publicity programs, and membership campaigns for the organization.
10. Maintain liaison with local and external government or non-governmental agencies as may be necessary or desirable.
11. Attend national or international Partners meetings or conferences, within or without Jamaica, as may be required.
12. Assist program committees to screen and to review requests for technical assistance under PAVTAS and in general, to aid them to carry out their responsibilities within the organization.
13. Organize briefing materials and sessions for volunteer technicians, other partners and guests of the organization arriving in Jamaica.

14. Advise program committees and the Board, on community based development assistance activities in which the organization might become involved, and on potential human and material resources which may be available to the organization.
15. Any other reasonable task which may be required from time to time for the effective discharge of the duties of the post.

4. Qualification:

- First Degree or comparable educational background
- At least 3 years experience in a supervisory or management capacity in an education, social, charitable or community based organization.
- International exposure and experience gained through some combination of study, employment or travel abroad.
- Human and inter-personal relations management skills.

5. Compensation:

<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>
J\$25,000*	J\$28,750*	J\$33,063*

*Plus an automobile

WESTERN NEW YORK/JAMAICA PARTNERS

JOB DESCRIPTION

Job Title: EXECUTIVE DIRECTOR (Western New York)

1. Reports to: The Board of Directors through the Chairman, or any other person or sub-committee designated by the Board.

 2. Principal Accountabilities: This position is accountable for carrying out policy decisions of the Board and for developing and maintaining an operational program which will meet the administrative program and professional volunteer requirements of the organization, including those of the Partners Voluntary Technical Assistance Service (PAVTAS).

 3. Duties:
 1. Handle the day to day operational requirements of the Western New York/Jamaica Partners office, including the requirements for managing the Partners Voluntary Technical Assistance Service (PAVTAS)
 2. Attend all regular, special or extraordinary meetings called by the Board of Directors.
 3. Keep the Minutes of these meetings for inclusion in the organization's Minute Book.
-

4. Respond to correspondence or other inquiries regarding the organization, its functions or services, as may be required.
5. Maintain regular communication by telephone or in writing with program committees of the organization, beneficiary organizations of PAVTAS, counterpart committees in Jamaica and with NAPA in Washington, D.C.
6. Plan and co-ordinate volunteer Partners travel to and from Jamaica, including the maintenance and management of a hospitality, or home stay roster for volunteers coming to Western New York.
7. Develop, produce and distribute a monthly newsletter.
8. Write and distribute press releases to further develop the organization's newsworthiness.
9. Provide leadership in the development and execution of fund raising, public relations and publicity programs, and membership campaigns for the organization.
10. Maintain liaison with local and external government or non-governmental agencies as may be necessary or desirable.
11. Attend national or international Partners meetings or conferences, within or without the U. S. as may be required.
12. Assist program committees to screen and to review requests for technical assistance under PAVTAS and in general, to aid them to carry out their responsibilities within the organization.
- ~~13. Organize briefing materials and sessions for volunteer technicians, other partners and guests of the organization arriving in Western New York.~~

14. Advise program committees and the Board on community based development assistance activities in which the organization might become involved, and on potential human and material resources which may be available to the organization.
15. Any other reasonable task which may be required from time to time for the effective discharge of the duties of the post.

4. Qualifications Desired:

- First Degree or comparable educational background
- At least 3 years experience in a supervisory or management capacity in an education, social, charitable or community based organization
- International exposure and experience gained through some combination of study, employment or travel abroad
- Human and inter-personal relations management skills.

5. Compensation:

Year 1	Year 2	Year 3
US\$16,000	US\$17,280	US\$18,662

JAMAICA/WESTERN NEW YORK PARTNERS
OF THE AMERICAS

JOB DESCRIPTION

JOB TITLE: Programme Assistant (Jamaica Partners)

REPORTS TO: The Executive Director

PRINCIPAL ACCOUNTABILITIES: This position is accountable for assisting the Executive Director with the effective co-ordination of the organizations' programmes including but not limited to the operational requirements of the Partners Voluntary Technical Assistance Service (PAVTAS) which has been funded under USAID/J Project 532-0086.

BASIC REQUIREMENTS: A first degree in the arts and humanities, education, sociology, international relations or comparable academic qualifications.

- Strong human and inter-personal relations skills
- Good Management Skills
- 2-3 years work experience

Desirable: Typing skills and a Driver's License

RESPONSIBILITIES:

1. To assist the Executive Director in monitoring meetings of the programme committees of the organization.
2. To assist with the maintenance of regular communication with programme committee chairpersons both in Jamaica and Western New York.
3. To assist in the co-ordination of volunteer travel to and from Jamaica, including the hospitality programme.
4. To assist in the monitoring of the Small Grants programme of the organization through field visits and with respect to the accounting system.
5. To co-ordinate the recruitment of appropriate Skills Bank Volunteers for PAVTAS.
6. To assist the Executive Director in the monitoring and coordination of the in-house technical assistance delivery programme, and PAVTAS workshops.
8. To assist in the development and execution of the public relations programmes of the organizations.

9. To submit monthly reports on the development of the organizations' programmes.
10. To supervize the work of the office attendant and clerk-typist.
11. To hold preliminary interviews with potential members, Skills Bank Volunteers, Training Grant candidates, potential client agencies.
12. To assist with the implementation of Special Projects (Ceremonies, functions, Newsletters, Seminars, etc.)
13. To make and take phone calls on the Executive Directors' behalf.
14. To conduct any other reasonable tasks which may be required from time to time for the effective discharge of the responsibilities of the position.



JAMAICA/WESTERN NEW YORK PARTNERS

GUIDELINES FOR THE OPERATION OF JAMAICA/WESTERN NEW YORK PARTNERS
PROGRAMME COMMITTEES

1.0 PURPOSE:

1.1 The Programme Committees of the Jamaica and Western New York Partnership function as the main channels through which the partnership implements its programme of development assistance in the fields of:

- (i) Agriculture
- (ii) Culture
- (iii) Community Education
- (iv) Health
- (v) Organization & Economic Development
- (vi) Sports
- (vii) Women-in-Development
- (viii) PATH
- (ix) *Tourism Sports*

2.0 STRUCTURE:

- 2.1 Each Committee is headed by a Chairman, who, in the first instance, is nominated by the Jamaica/Western New York Board of Directors, and invited to form the Committee
- 2.2 At the end of each year of service, the Committee membership should hold elections for the new year. These elections should ideally be held immediately after the AGM of the JA/WNY Board.
- 2.3 A Committee may have a minimum of five and a maximum of twelve members.
- 2.4 Each Committee must be headed by a Chairman; and may create those positions such as Deputy Chairman, Secretary, Treasurer and Public Relations Officer, according to its needs.
- 2.5 The Executive Director is an ex-officio member of each Programme Committee.
- 2.6 Programme Committees and PAVTAS:
The work of the Programme Committees is essential to the objectives of PAVTAS. PAVTAS relies on the human resources and expertise identified and provided by the Programme Committees to service the technical assistance requests of eligible organizations. PAVTAS will also serve as a feeder of information on needs of organizations which may be serviced through the regular programme of the Committees.



3.0 ROLE AND FUNCTION:

- 3.1 The Chairman of each Programme Committee reports to the Board through the Executive Director on his/her Committee's activities. The Executive Director as ex-officio member of each Programme Committee, functions as liaison between the administration and each of these Committees. It is therefore expected that there will be close communication between the Committee Chairman and the Executive Director.
- 3.2 Committees are wholly responsible for those functions necessary for the implementation of their programmes:
- e.g. (i) Preparation of an annual plan/programme
 - (ii) Calling of Committee meetings (Chairman)
 - (iii) Recording and preparation of minutes of meetings (Secretary)
 - (iv) Preparation of Financial Statements as necessary (Treasurer)
 - *(v) Fundraising as necessary
 - (vi) Preparation of an annual report
 - (vii) Communicating with counterpart Committee

Within the limit of resources, the JA/WNY Partners office will provide assistance to the Committees in carrying out their functions.

4.0 FINANCIAL PROCEDURES:

- 4.1 Each Committee has the responsibility of monitoring and reporting on the receipt and usage of resources (cash or kind) raised on behalf of that Committee for use in its programmes. The Committee Treasurer must prepare regular Income and Expenditure statements. The JA/WNY Partners office disburses the funds of a Committee, on the advice of the particular Committee and in keeping with the established financial procedures of the organization, as approved by the JA/WNY Partners Board.

5.0 COMMUNICATION:

- 5.1 Committees communicating directly with their counterpart WNY Committees and/or NAPA, are requested and advised to copy all correspondence relating to the work of Partners to the Executive Director.
- 5.2 Each Committee should report to the Board at the times and in the format decided by the Board.

CHAPTER 7

ADMINISTRATIVE ASSESSMENT

7.1 The Board of Partners

7.1.1 The Boards of both branches of the Partners are composed of outstanding members of their communities.

7.1.2 In Jamaica the 1984-85 Board is:

- Dr. Lloyd B. Hunter - Communications Consultant - Chairman
- Dr. Neville Ying - Deputy Chairman
- Mr. Leroi Lorde - Executive Director - JA Manufacture Associates - Treasurer
- Mrs. Eleanor Jones - UWI lecture and consultant - secretary
- Dr. Hon Wesley Powell - Educator - board member
- Mrs. Daphne Adams
- Dr. Marigold Thorborn

7.1.3 The Western New York Board is:

- Dr. Keith Curry - Professor of Special Education - President

- Mr. Douglas Sandburg - Businessman - V. President
- Mr. Daniel Ricigliano - Certified Public Accountant - Treasurer
- Ms. Roberta Powers - Occupational therapist - secretary
- Mr. Paul Bahr - Principal Martin Luther Christian School - Board Member
- Mr. David Calverley - Attorney at Law - Board member
- Dr. Robert Guthrie - Professor of Microbiology - Board member
- Dr. Allan Korn - Professor Business Studies - Board member
- Mr. George Reidel - Attorney at Law - Board member
- Dr. Lee Snyder - Professor of Philosophy - Board member
- Mr. Robert Stevens - Director of Continuing Education - Board member

7.1.4 The approach to and conduct of the business of the Partners varies and may reflect the influence of their social and economic milieu.

Western New York

i) a) Board meetings have been held regularly over the years except in 1983 when there appears to have been few.

Jamaica

b) Monthly Board have been held each month since March, 1981, except in November.

1981 8 meetings held
1982 7 meetings held
1983 3 meetings held
1984 9 meetings held
*1985 2 meetings held
*to March

1981 11 meetings held
1982 11 meetings held
1983 11 meetings held
1984 11 meetings held
*1985 3 meetings held
*to March

ii)a) Meetings are usually held in the afternoon and last for (2) two hours. Meetings are much more structured now than previously.

b) Meetings are usually quite long and sometimes are followed by retreats (particularly in 1981 and 1982) which occupy an entire day, usually Saturdays.

iii)a) Attendance at meetings appears to be around seventy percent (70%) of Board members. Both the Executive Director and Administrative secretary attend the Board meetings.

b) Attendance is very high, usually over eighty-five percent (85%) of Board members. The Executive Director attends the Board meetings.

iv)a) At Board meetings the Executive Director gives a report which is separate from minutes of the meeting. The report deals almost entirely with matters concerning technical assistance. Discussions are confined to items requiring decisions. Recommendations for Board action are sometimes made.

b) The Executive Director gives a detailed report on all aspects of the programme and often makes suggestions or recommendations to the Board for action. The report is separate from the minutes of the meeting. Discussion on the report is often lengthy and detailed. Thought is now being

given for a summary only to be presented at Board meetings.

v)a) The Board is now in the process of framing policies, guidelines and by-laws. The main areas of concern appear to be policy rules in relation to TA travel and the operation of Programme Committees.

b) Board policies are quite well established. Main gray area appears to be the relationship of the recently-appointed Program Assistant with the Board.

7.1.5 The perceptions of some Board members of both branches of the Partnership, coincide on the need to (1) remove the donor/benefactor element which characterised many of the exchanges over the years, and (2) to promote a true partnership by mutually beneficial exchanges.

A number of subsidiary considerations arise.

i) In what areas can there be useful South/North exchanges?

a) Western New York
Arts and Culture are seen by some as the most likely program area to contribute to TA exchanges. Sports may offer a little scope. It is also thought that Small Business could lead the way.

b) Jamaica
Jamaica would like to see South/North TA exchanges in professional fields serving many program areas and not confined to cultural exchanges.

ii) To what extent are approaches to Technical Assistance common to both branches?

a) Western New York

The Western New York Board is asking,
"Is this a repetition of an activity
or a development from an activity?"
"How do we know that this is
worthwhile?"

b) Jamaica

Here is a need, it has met the
criteria. How soon can the
organization put together the TA
to address this need?

iii) Although the words are the same to what extent are the realities
congruent, for example, Small Business? or farm size?

a) Western New York

An entity that employs
2-50 persons

b) Jamaica

An entity that employs
2 + persons.

Average farm is over 100 acres in size.

Average small farm is less than
5 acres in size

7.1.6 It is clear that there needs to be much more planning and
communication between the partners. The consulting team
recommends that a limited and totaling number of programme
Committees from both branches, and top officers of the
Partnership meet annually to plan the business of the respective
program areas for a suitable ensuing period.

7.1.7 It would be incorrect to assume that the history of 1982 to 1984 has been entirely buried. A purposeful and deliberate effort needs to be made to remove whatever vestiges may remain of the unpleasantness of recent years. The evaluators found a strong desire on both sides to accomplish this, but it has to be done at the Board level. No problems of this sort exist at the Administrative level.

7.2 The Administrative Staff

7.2.1 Recruitment of staff began in December, 1982, in Jamaica but was delayed until October, 1984, in Western New York.

7.2.2 At present, staff complements are:

a) <u>Western New York</u>	b) <u>Jamaica</u>
1 Executive Director	1 Executive Director
1 Part-time Secretary	1 Programme Assistant
	1 Clerk/typist
	1 part-time accountant
	1 office attendant

7.2.3 Job descriptions of the posts of Executive Directors, Programme Assistant and Secretary appear as appendices 7.1 to 7.4 at the end of this chapter.

7.2.4 Examination of the Administrative functions of the staff in both Branches reveals that there is a great deal of interfacing with several agencies and units within their daily work.

<u>Organization or Unit and who Interfaces</u>	<u>Western New York</u>		<u>Jamaica</u>	
	<u>Ex. Dir.</u>	<u>PT Sec.</u>	<u>Ex. Dir.</u>	<u>Prog. Assist.</u>
i) National Assoc. of Part. of Am. (NAPA)	x		x	
ii) WNY a. Admin. b. Prog. Comm.			x	x
iii) JA a. Admin. b. Prog. Comm.	x	x	x	
iv) Board	x	x	x	
v) Exec. Committee	-	-	x	
vi) Chairman	x	x	x	
vii) Selection Committee	-	-	x	
viii) Program Committee	x	x	x	x
ix) Volunteers	x	x	x	x
x) Beneficiaries	x	x	x	x
xi) Membership	x	x	x	x
xii) Accountant	x	x	x	x
xiii) General Public	x	x	x	x
xiv) Funding Sources	x	x	x	x

7.2.5 The Jamaica Branch finds that Programme Committees are particularly demanding on administrative time and estimates that they account for probably 45% of the work time of the Program Assistant. Guidelines for the operation of the Jamaica Programme Committees appears as Appendix 7.6.

7.2.6 The Executive Director and Part-time Secretary in the Western New York office work as a closely-knit team.

7.2.7 The secretary is a college graduate who, apart from the involvement shown on the chart above, also operates the computer. It would be a pity if, for lack of proper remuneration, that secretary should be lost to the Western New York Office.

7.2.8 If fund-raising is to be properly planned and executed, the Executive Directors need to be less involved at some levels of the organizations' operations. In Jamaica the introduction of the Programme Assistant is meant to accomplish this, we have been informed. In Western New York, staff adjustments need to be made, and this we suggest could take the form of giving full-time employment to the part-time secretary and employing a part-time secretary as well.

7.2.9 We recommend that a staff requirement assessment be done in both offices, in view of the urgent need to divert much energy into fund-raising.

7.3 Source Constraints to Administrative Efficiency

7.3.1 A major constraint to administrative efficiency resides in the fact that whereas employed administrative staff have a career interest in their jobs, all the people with whom they deal are either volunteers, beneficiaries or persons in such positions as not to be directly threatened by lack of performance in relation to the Partners programme.

7.3.2 Thus the Western New York Office has been waiting for five (5) months for US\$2,000, a check which is now held up in the AID Washington Office. Thus a Programme Committee chairperson has not yet submitted a badly needed report after several months of pleading and encouragement.

7.3.3 In Jamaica the motor car for the Executive Director was on the wharf for seven months.

7.3.4 The efficiency of the program is adversely affected by what we recognise to be differences in perception between the Partners and in particular of;

a) the role of PAVTAS vis-a-vis the total Partners program

b) the nature of the flow of technical assistance from South to North

c) the application of the not-for-profit criteria in the PAVTAS project.

APPENDIX 6.1

THE JAMAICA/WESTERN NEW YORK PARTNERS OF THE AMERICAS LIMITED
(A Company Limited by Guarantee) .

Notes to the Financial Statements (cont'd)

Year ended 30th September, 1983

Projects in progress:

Projects in progress comprise the following:-

	<u>NAPA/ American Express</u>	<u>Voluntary Organisation for the Upliftment of Children</u>	<u>Excelsior Education Centre</u>	<u>Sam Sharpe Teacher Training College</u>	<u>Caribbean Institute of Mental Retardation</u>	<u>Y.M.C.A. Street Corner Boys</u>	<u>Girls' Town</u>	<u>St. Catherine Parents Association for the Handicapped</u>	<u>1983</u>	<u>1982</u>
Amounts received from:										
Alliance of Partners of the Americas	1,332	7,469	8,003	-	-	-	11,364	-	28,168	16,800
I. B. M.	-	-	-	-	1,000	-	-	-	1,000	-
Caribbean Research Committee	-	3,769	-	3,336	-	3,558	-	4,768	17,431	3,333
P. A. T. H.	-	-	-	-	3,294	-	-	-	3,294	3,294
Less amounts expended	1,332	11,238	8,003	5,336	4,294	3,558	11,364	4,768	49,893	23,400
	-	6,044	8,164	4,894	3,821	1,144	9,224	239	33,530	7,400
Balance at 30th September, 1983	<u>1,332</u>	<u>5,194</u>	<u>(161)</u>	<u>442</u>	<u>473</u>	<u>2,414</u>	<u>2,140</u>	<u>4,529</u>	<u>16,363</u>	<u>17,400</u>

THE JAMAICA/WESTERN NEW YORK PARTNERS OF THE AMERICAS LIMITED

(A Company Limited by Guarantee)

Notes to the Financial Statements (cont'd)

Year ended 30th September, 1984

G. Projects in progress:

Projects in progress comprise the following:-

	<u>NAPA/ American Express</u>	<u>Voluntary Organisation for the Upliftment of Children</u>	<u>Excelsior Education Centre</u>	<u>Sam Sharpe Teacher Training College</u>	<u>Caribbean Institute of Mental Retardation</u>	<u>Y.M.C.A. Street Corner Boys</u>	<u>Girls' Town</u>	<u>St. Catherine Parants Association for the Handicapped</u>	<u>Jones Town Project</u>	<u>Awards Ceremony Account</u>	<u>1984</u>
Balance at 30th September, 1983	1,332	5,194	(161)	442	473	2,414	2,140	4,529	-	-	16,363
Amounts received in year:											
M. A. P. A.	-	-	-	-	-	-	-	-	13,858 /	-	13,858
I. B. M.	-	-	-	-	-	-	-	-	-	-	-
Courts Jamaica Limited	-	-	-	-	-	-	-	-	10,000 ✓	-	10,000
Caribbean Research Committee	-	-	-	-	-	-	-	-	-	-	-
F. A. T. M.	-	-	-	-	40,911	-	-	-	-	-	40,911
Miscellaneous grants	-	-	-	-	-	-	-	-	-	130	130
	<u>1,332</u>	<u>5,194</u>	<u>(161)</u>	<u>442</u>	<u>41,384</u>	<u>2,414</u>	<u>2,140</u>	<u>4,529</u>	<u>23,858 ✓</u>	<u>130</u>	<u>81,262</u>
Less amounts expended in year	-	150	-	-	33,315	700	2,140	4,529	19,835	-	60,669
Balance at 30th September, 1984	<u>\$1,332</u>	<u>5,044</u>	<u>(161)</u>	<u>442</u>	<u>8,069</u>	<u>1,714</u>	-	-	<u>4,023</u>	<u>130</u>	<u>20,593</u>

APPENDIX C.3

PARTNERS VOLUNTARY TECHNICAL ASSISTANCE SERVICE (PAVTAS)

JAMAICA - BUDGET

JUNE 30, 1983

CATEGORY	TOTAL		FY 1		FY 2		FY 3	
	J\$	OTHER	J\$	OTHER	J\$	OTHER	J\$	OTHER
A. PERSONNEL:								
Executive Director	86,813	-	25,000	-	28,750	-	33,063	-
Secretary	31,253	-	9,000	-	10,350	-	11,903	-
As needed Clerical	9,500	6,500	5,000	-	3,500	3,000	2,000	3,500
Driver/Messenger	15,654	8,655	2,000	-	4,025	4,025	4,629	4,630
SUB TOTAL	143,220	15,155	46,000	-	45,625	7,025	51,595	8,130
B. TECHNICAL ASSISTANCE/TRAINING:								
Technical Assistant's Travel	26,000	-	5,000	-	10,500	-	10,500	-
Technical Assistant's Hospitality	15,000	-	3,000	-	6,000	-	6,000	-
Workshops/Seminars/TR	180,000	20,000	40,000	-	70,000	10,000	70,000	10,000
Training Materials	40,000	10,000	10,000	-	15,000	5,000	15,000	5,000
SUB TOTAL	261,000	30,000	98,000	-	101,500	15,000	101,500	15,000
C. COMMODITIES:								
(US Procured FX converted to J\$)								
✓ Vehicle for Executive Director	18,000	-	18,000	-	-	-	-	-
Station Wagon	21,000	-	21,000	-	-	-	-	-
✓ 2 Electric Typewriters	5,335	-	5,335	-	-	-	-	-
✓ Photocopier	10,000	-	10,000	-	-	-	-	-
✓ 16mm Projector	2,135	-	2,135	-	-	-	-	-
✓ Overhead Projector	623	-	623	-	-	-	-	-
Wall/Ceiling Mount Screen	120	-	120	-	-	-	-	-
VTR Unit & Camera	5,500	-	5,500	-	-	-	-	-
3 Audio Tape Recorders	710	-	710	-	-	-	-	-
Slide/Sound Projector Unit	1,425	-	1,425	-	-	-	-	-
A/V Accessories	3,000	-	3,000	-	-	-	-	-
Office Furniture (Locally Procured)	15,000	5,000	7,500	2,500	7,500	2,500	-	-
SUB TOTAL	82,848	5,000	75,348	2,500	7,500	2,500	-	-
D. OTHER OFFICE SUPPORT COSTS:								
Rent/Utilities	27,231	-	9,077	-	9,077	-	9,077	-
Telephone	21,600	-	7,300	-	7,200	-	7,200	-
Auto Expenses	36,000	-	12,000	-	12,000	-	12,000	-
Materials/Supplies	12,000	3,000	5,000	-	3,500	1,500	3,500	1,500
Stationery/Printing	12,000	3,000	5,000	-	3,500	1,500	3,500	1,500
Petty Cash/Postage	6,000	3,000	2,000	1,000	2,000	1,000	2,000	1,000
Office Repairs/Maintenance	4,000	2,000	1,500	1,000	1,500	500	1,000	500
Equipment Rental/Repairs	-	3,000	-	1,000	-	1,000	-	1,000
Fund Raising	-	12,000	-	5,000	-	3,500	-	3,500
Advertising Promotion	-	9,000	-	3,000	-	3,000	-	3,000
Insurance	4,500	-	1,500	-	1,500	-	1,500	-
Legal Fees	3,000	-	1,000	-	1,000	-	1,000	-
Accounting Fees	3,000	-	1,000	-	1,000	-	1,000	-
Administrative Travel	9,000	-	3,000	-	3,000	-	3,000	-
Evaluation	88,925	-	17,785	-	35,370	-	15,370	-
SUB TOTAL	237,256	35,000	66,062	11,000	80,847	12,000	40,347	12,000
GRAND TOTAL	714,324	85,155	245,410	13,500	235,472	36,525	233,442	33,130

(US 400,000) (J\$ 47,687)

APPENDIX 6.4

PARTNERS VOLUNTARY TECHNICAL ASSISTANCE SERVICE (PAVTAS)
WESTERN NEW YORK BUDGET
YEAR I - OCTOBER 1984 - SEPTEMBER 1985

Notes	Category	Total	Quarters				Other	Source of Funding
			First (O-N-D)	Second (J-F-M)	Third (A-M-J)	Fourth (J-A-S)		
	<u>Personnel</u>							
1	Executive Director	24,600	6,150	6,150	6,150	6,150		
2	Secretary	6,000	1,500	1,500	1,500	1,500		
3	Fringe Benefits	5,300	1,325	1,325	1,325	1,325		
	Subtotal	<u>35,900</u>	<u>8,975</u>	<u>8,975</u>	<u>8,975</u>	<u>8,975</u>		
	<u>Technical Assist.</u>							
4	T.A. (S-I)	3,000	750	750	750	750	7,500	in-kind homestay
5	JA Trainee Ground	1,450	200	500	400	350	3,000	in-kind homestay
6	Directors Travel	2,000	1,000	100	500	400	1,000	in-kind
7	Training Materials	500	125	125	125	125	500	in-kind
	Subtotal	<u>3,950</u>	<u>2,075</u>	<u>1,475</u>	<u>1,775</u>	<u>1,625</u>		
8	TA (N-S)	(4,000)*	(1,000)	(1,000)	(1,000)	(1,000)	3,000	*transfer from JA to WNY budget not part of regular bud.
	<u>Commodities</u>							
9	Elec. Typewriter	500	-0-	500	-0-	-0-		
10	Word Processor	2,600	2,600	-0-	-0-	-0-		
11	Dictating Equipment	250	-0-	250	-0-	-0-		
12	Telephone	360	360	-0-	-0-	-0-		
13	Office Furniture	1,550	1,550	-0-	-0-	-0-		
14	Audio Equipment	490	-0-	-0-	490	-0-		
15	Copier	1,400	1,400	-0-	-0-	-0-		
	Subtotal	<u>7,150</u>	<u>5,910</u>	<u>750</u>	<u>490</u>	<u>-0-</u>		

Notes	Category	Total	-----QUARTERS-----				Other	Source of Funding
			First (O-N-D)	Second (J-F-M)	Third (A-M-J)	Forth (J-A-S)		
	<u>Office Support</u>							
15	Rent	3,000	840	720	720	720		
17	Telephone	2,000	700	450	450	400		
18	Auto Exp.	1,500	375	375	375	375		
19	Material/Supplies	1,500	500	400	300	300		
20	Stat./ Printing	1,500	500	400	300	300		
21	Postage	1,000	250	250	250	250		
22	Office Repairs	300	100	100	100	-0-		
23	Equip. Rental	500	225	100	75	100		
24	Fund Raising	-0-	-0-	-0-	-0-	-0-	1,000 in-kind	
25	Advertising	400	150	100	50	100		
26	Insurance	500	-0-	500	-0-	-0-		
27	Legal Fees	250	-0-	-0-	-0-	250	500 in-kind	
28	Account Fees	250	-0-	-0-	-0-	250	500 in-kind	
29	Board/Off. Travel	3,000	1,000	1,000	500	500	500 in-kind	
	Subtotal	15,700	4,640	4,395	3,120	3,545		
30	<u>Skills Bank Ser.</u>						150,000 in-kind	
	GRAND TOTAL	\$ 65,700	\$ 21,600	\$ 15,595	\$ 14,360	\$ 14,145	\$ 167,500	
		(69,700)*	(22,600)	(16,595)	(15,360)	(15,145)		

PARTNER VOLUNTARY TECHNICAL ASSISTANCE SERVICE (PAVTAS)

WESTERN NEW YORK - BUDGET

JUNE 30, 1982

<u>CATEGORY</u>	<u>TOTAL</u>		<u>FY 1</u>		<u>FY 2</u>		<u>FY 3</u>	
	<u>USD</u>	<u>USD</u>	<u>USD</u>	<u>USD</u>	<u>USD</u>	<u>USD</u>	<u>USD</u>	<u>USD</u>
	<u>AID</u>	<u>OTHER</u>	<u>AID</u>	<u>OTHER</u>	<u>AID</u>	<u>OTHER</u>	<u>AID</u>	<u>OTHER</u>
A. PERSONNEL								
Executive Director (3/4)	37,000	22,035	17,000	-	10,000	9,550	10,000	12,485
Secretary (Full Time)	22,362	12,363	10,000	-	5,750	5,750	6,612	6,613
SUB TOTAL	59,362	34,398	27,000	-	15,750	15,300	16,612	19,098
B. TECHNICAL ASSISTANCE/TRAINING								
Technical Assistants' Travel	10,000	14,000	5,000	3,000	3,000	5,000	2,000	6,000
Workshops/Seminars/TA	9,000	6,000	4,000	1,000	3,000	2,000	2,000	3,000
Training Materials	10,000	10,000	5,000	5,000	3,000	3,000	2,000	2,000
SUB TOTAL	29,000	30,000	14,000	9,000	9,000	10,000	6,000	11,000
C. COMMODITIES								
Electric Typewriter	1,200	-	1,200	-	-	-	-	-
Photo copier	2,000	-	2,000	-	-	-	-	-
Audio Visual Equipment	-	6,000	-	2,000	-	3,000	-	1,000
Office Furniture	2,500	-	2,500	-	-	-	-	-
SUB TOTAL	5,700	6,000	5,700	2,000	-	3,000	-	1,000
D. OTHER OFFICE & SUPPORT COSTS								
Rent/Utilities	-	9,000	-	3,000	-	3,000	-	3,000
Telephone	3,000	4,500	1,000	1,500	1,000	1,500	1,000	1,500
Auto Expenses	-	3,000	-	1,000	-	1,000	-	1,000
Materials/Supplies	-	4,000	-	2,000	-	1,000	-	1,000
Stationery/Printing	-	4,000	-	2,000	-	1,000	-	1,000
Petty Cash/Postage	-	3,000	-	1,000	-	1,000	-	1,000
Office Repairs/Maintenance	-	1,500	-	500	-	500	-	500
Equipment Rental/Repair	-	1,500	-	500	-	500	-	500
Fund Raising	-	10,000	-	4,000	-	3,000	-	3,000
Advertising/Promotion	-	3,600	-	1,200	-	1,200	-	1,200
Insurance	-	1,500	-	500	-	500	-	500
Legal Fees	-	1,500	-	500	-	500	-	500
Accounting Fees	-	1,500	-	500	-	500	-	500
Administrative Travel	3,000	-	1,000	-	1,000	-	1,000	-
Evaluation	-	10,000	-	2,000	-	4,000	-	4,000
SUB TOTAL	6,000	58,600	2,000	20,200	2,000	19,200	2,000	19,200
GRAND TOTAL	100,062	128,998	48,700	31,200	26,750	47,500	24,612	50,298

CHAPTER 8

RECOMMENDATIONS

8.1 Conditions for Extension of Funds

It is recommended that funds be extended for the period of one year with an option to renew for one additional year. The renewal option should be made conditional upon achievement of predetermined goals. These goals should be specifically defined and agreed upon by representatives of WNY, JA and AID prior to entering into the first year of extended funding. Following is a list of conditions which could serve as a basis for defining these goals.

- That during year one of the extension a predetermined amount of funds be raised in both JA and WNY, and that this amount serve as the basis for granting an equal amount of matching AID funds for the second extension year. An alternative would be to determine the amount necessary to operate during the second extension year and have AID commit to providing funds not to exceed 50% of that amount.

- That during the first extension year WNY and JA demonstrate an ability to work together effectively by developing a joint two year plan for fundraising and technical assistance delivery; and

- Both partners examine their projected funding needs and negotiate a reasonable redistribution of operating funds allotted to their respective budgets.

8.2 Staffing Requirements Assessment

We recommended that an assessment of staffing requirements and job descriptions be conducted in both WNY and Jamaica. The focus of this assessment should be on the need to concentrate the energies of the Executive Directors on fundraising, refinement of N/S TA exchanges, and mutual long-range planning between WNY and JA.

8.3 Joint Planning

Due to the need for increased mutual planning and clarification of perceptions, it is recommended that selected representatives of Program Committees from both WNY and JA as well as officers and Board Members meet annually on a rotating basis to plan the business and activities of the respective program areas for suitable ensuing periods.

8.4 Fundraising

JA and WNY should develop a clear and explicitly defined fundraising strategy for a period of one to two years with projected amount to be raised quarterly or semi-annually.

8.5 Promotion and Publicity

JA and WNY should share insights regarding approaches to promotion and publicity. It is recommended that they develop a joint publicity strategy with a focus on promoting those aspects of the program which might attract funds.

8.6 Role of PAVTAS

When queried as to the role of PAVTAS and its relation to the Partners program as a whole, some Board members and Skills Bank Volunteers either did not know the nature of the relationship or were confused about it. It is recommended that an effort be made to clarify this through mechanisms which can most effectively communicate a consistent message to all members (i.e. Newsletters, General Meetings).