

I. PROJECT IDENTIFICATION

1. PROJECT TITLE
 Development Program Grant for Goodwill Industries of America, Inc. (GIA)

APPENDIX ATTACHED
 YES NO

2. PROJECT NO. (M.O. 1095.2)

3. RECIPIENT (specify)
 COUNTRY
 REGIONAL L.A. & AFR INTERREGIONAL

4. LIFE OF PROJECT
 BEGINS FY -1976
 ENDS FY -1978

5. SUBMISSION
 ORIGINAL _____ DATE _____
 REV. NO. _____ DATE _____
 CONTR./PASA NO. _____

II. FUNDING (\$000) AND MAN MONTHS (MM) REQUIREMENTS

A. FUNDING BY FISCAL YEAR	B. TOTAL \$	C. PERSONNEL		D. PARTICIPANTS		E. COMMODITIES \$	F. OTHER COSTS \$	G. PASA/CONTR.		H. LOCAL EXCHANGE CURRENCY RATE: \$ U.S. (U.S. OWNED)		
		(1) \$	(2) MM	(1) \$	(2) MM			(1) \$	(2) MM	(1) U.S. GRANT LOAN	(2) COOP COUNTRY	(A) JOINT
1. PRIOR THRU ACTUAL FY												
2. OPBN FY 1976	119						119					
3. BUDGET FY 1977	121						121					
4. BUDGET +1 FY 1978	99						99					
5. BUDGET +2 FY												
6. BUDGET +3 FY												
7. ALL SUBQ. FY												
8. GRAND TOTAL	339						339					

9. OTHER DONOR CONTRIBUTIONS

(A) NAME OF DONOR	(B) KIND OF GOODS/SERVICES	(C) AMOUNT
N/A	N/A	N/A

III. ORIGINATING OFFICE CLEARANCE

1. DRAFTER Maurice D. Kohan, PHA/PVC/OPNS	TITLE Senior Development Officer	DATE 11/12/75
2. CLEARANCE OFFICER Cleo F. Shook, PHA/PVC/OPNS	TITLE Associate Director, PHA/PVC	DATE 11/12/75

IV. PROJECT AUTHORIZATION

1. CONDITIONS OF APPROVAL
 3. John A. Ulinski, Jr. PHA/PVC

2. CLEARANCES

BUR/OFF.	SIGNATURE	DATE	BUR/OFF.	SIGNATURE	DATE
LA/MRSD	E. Marasciulo	11/17/75	PHA/PRS	C. D. McMakin	12/3/75
AFR/DP	Dwight Wilson	12/1/75			
PPC/DPR	John Welty	11/26/75			

3. APPROVAL AAS OR OFFICE DIRECTORS SIGNATURE _____ DATE _____	4. APPROVAL AID (M.O. 1095.1 VI C) SIGNATURE _____ DATE _____
ADMINISTRATOR, AGENCY FOR INTERNATIONAL DEVELOPMENT	

PROJECT PAPER FOR A DEVELOPMENT PROGRAM GRANT

FOR

GOODWILL INDUSTRIES OF AMERICA, INC.

OCTOBER 1975

PHA/PYC/OPNS:10/10/75

GOODWILL INDUSTRIES OF AMERICA, INC.
DEVELOPMENT PROGRAM GRANT PROJECT PAPER
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I. Organization

A. Description of Organization

Goodwill Industries of America, Inc. (GIA) is a nonprofit, charitable, educational, social service, rehabilitation and philanthropic corporation. The corporation was organized under the laws of the Commonwealth of Massachusetts and chartered on March 14, 1910. Its principal offices are at Washington, D.C. Copies of the Charter, Constitution, and Bylaws are attached as enclosures 1, 2, and 3, respectively.

The purpose of Goodwill Industries of America, Inc., is to provide leadership and assistance to organizational members in their efforts to help the handicapped, disabled and disadvantaged attain their fullest individual potential development by (a) improving the quality and effectiveness of rehabilitation services, (b) providing guidance to their programs, (c) furthering the continued relevance of the Goodwill movement to the needs of a changing society and a continued growth of the movement to meet a larger share of those needs. There are presently 156 autonomous Goodwill Industries member organizations in the United States that support Goodwill Industries of America, Inc. through dues based on a dues structure related to their earned income. Goodwill Industries of America, Inc. also receives financial support from government grants, corporation grants, foundations and individual contributions. There are, in addition, 21 Goodwill affiliates in foreign countries who financially support the international program of GIA through the International Council on a nominal basis. See the Goodwill directory as enclosure 4, pages 47-51.

B. Board of Directors

The Board of Directors of GIA is composed of 35 members who are elected "in so far as possible on the basis of individual qualifications, geographic

distribution diversity of interest and experience as to be broadly representative of the general public." A roster of the current Board of Directors is enclosed as part of the Goodwill directory pages 36-46.

C. National Office Personnel

The national office provides a number of services to its member organizations including organizational assistance, executive and staff training, training and operational aids, technical assistance, legal and legislative information, resource and project development, rehabilitation consultation, finance and management information systems, public relations and coordinating activities with other national and international organizations.

There are a total of 38 staff members at the GIA headquarters, 10 professional, 14 technical, and 14 clerical staff. The following list is of the GIA professional staff who direct the programs and activities of the organization. Enclosure 5 includes the job descriptions for all 10 of these professional staff members.

Dean Phillips
President, GIA

Joseph E. Pouliot
Vice President, GIA

Julia K. Ely
Director, Education and Training

Howard Garnitz
Director, Resource Development

Robert J. Griggs
Director, Project Development

John C. Harmon, Jr., J.D.
General Counsel

Jack Hutchison, Ph.D.
Director, Rehabilitation

Kermit I. Meier
Director, International Operations

Dennis Pastrana
Director, Finance and Management Information Systems

Matthew Warren
Director, Public Relations

D. International Program

The International Program of GIA has been handled as a part-time responsibility of one of the staff, aided from time to time by Goodwill executives from member organizations, Board members and part-time consultants who have made overseas visits. Over the past 50 years, interested groups in foreign countries have been assisted in establishing Goodwill programs at their request. About 30 such organizations have been founded and a loose relationship has existed between these organizations and GIA. In 1971, in response to the desire of many of the foreign affiliates that a more formal relationship be established, the International Council was formed. There are presently 21 overseas Goodwill organizations affiliated with the Council. The purpose of the Council is to provide, improve and extend the services in a manner similar to that which GIA provides to the American member organizations. However, this goal has not been reached as the funding has been inadequate. The International Program has had to rely on nominal dues from the overseas affiliates and contributions from corporations and individuals in the United States. In 1974, the Board of Directors approved a revised set of goals and objectives which provided for a more active international program.

An illustration of the types of programs which Goodwill Industries, Inc. has been able to assist in Latin America is as follows:

Mexico City, Mexico	rehabilitation program
San Jose, Costa Rica	vocational training
Bogota, Colombia	rehabilitation and vocational training programs.
Caracas, Venezuela	rehabilitation and vocational training programs
Montevideo, Uruguay	typical GIA program of job creation
Santo Domingo, Dominican Republic	clinic, school and workshop for handicapped.

E. Budget and Transition after the Grant

Enclosure A presents the Goodwill Industries of America, Inc. budget for 1975, broken down into the following categories:

1. Summary of Revenue and Expenses.
2. Summary of All Financial Activities.
3. Support from the Public and Revenues Supporting Schedule.
4. Program Services to Member Agencies.
5. Membership National Governing Activities.
6. Supporting Services.

Also included, as enclosure B, is a complete annual audit for 1974 from the public accounting firm of Arthur Andersen and Co.

Goodwill Industries of America, Inc. will have the financial capability to support the increased level of activity after the expiration of the Development Program Grant. The GIA International Program will then concentrate on implementing of programs developed during the 3-year Development Program Grant. There will no longer be a need for the research function of the staff, but it will be necessary to employ a Deputy Program Director to assist in providing program planning and technical assistance to countries interested in adopting the vocational rehabilitation programs.

F. Collaboration with A.I.D. and Other Agencies

Goodwill Industries of America, Inc. has not engaged in any collaborative efforts with A.I.D. or other U.S. Government agencies in overseas development activities up to the present time.

II. RATIONAL

A. Introduction to Vocational Rehabilitation

There are two widely accepted definitions of rehabilitation, one with a

purely medical connotation which views rehabilitation as the use of all those medical measures which expedite recovery. These measures are for the most part in the field of physical medicine and are employed as a supplement to the specific medical or surgical treatment contributed by the doctor. There is another definition, one more broadly conceived and mainly accepted by professional workers in public and private agencies dealing with physically handicapped persons. Rehabilitation, according to this definition, is the restoration of the handicapped to the fullest physical, mental, social, vocational and economic usefulness of which he is capable.

Rehabilitation, in this wider sense, poses a problem to the community which challenges many specialized skills and involves a number of separate disciplines and different services: medical, social, educational and vocational.

The two major components of the whole rehabilitation process are medical rehabilitation and vocational rehabilitation. Each has a separate personality and distinct set of disciplines, but each complements the other. They should be linked as closely as possible for both are essential for rehabilitation to be truly successful.

This latter component embodies the philosophy of Goodwill Industries. In some Goodwills, many of these services are all under one roof and in others, there is a working relationship with educational and social resources in the community. The workshop provides the means to assess a clients potential and to give them work experience and training so that he can become self-supporting.

The aim of vocational rehabilitation is satisfactory resettlement. It is a culminating point in a process which differs in the stages through which

different individuals pass. Resettlement may be achieved in open or sheltered employment. It may be achieved with or without work testing, aptitude testing, psychological testing, extensive and prolonged vocational guidance, reconditioning or vocational training.

The services that are involved in the rehabilitation process are:

1. Assessment - Obtaining a clear picture of the disabled persons remaining physical, mental and vocational abilities and possibilities.
2. Guidance - Advising him accordingly in the light of vocational training and employment possibilities.
3. Work Preparation and Training - Providing any necessary reconditioning, toning-up or formal vocational training.
4. Placement - Assisting him to find suitable work.
5. Sheltered Employment - Providing work under special arrangements.
6. Follow-up - Follow-up until resettlement is achieved.

In all countries, particularly where great efforts are being made to raise the living standards by education, vocational training, productivity, etc., the loss of former or potentially skilled workers through disability simply cannot be afforded. They are national assets that should be preserved.

The disabled must be thought of as part of the general population and entitled to the same rights, privileges, services and considerations as others and equally having the same responsibilities. They are not second class citizens. Moreover, the employment of the disabled leads to an increase in over-all production and reduces the number of economically unproductive persons.

The above is basically an outline and synopsis of the rehabilitation process

as seen by professional rehabilitation experts which is applicable in any country. However, the methods and programs that evolve from these principles have to be tailored to the needs of the community, culture and needs of the handicapped or disabled persons in each locality.

Goodwill Industries vocational rehabilitation programs offer rehabilitation services, sheltered employment and work. The therapeutic value of work has been demonstrated through numerous research studies. Work has proven effective when other rehabilitation approaches have failed. Work is an effective tool, a vehicle to assist disabled people to achieve functional and economic independence. The intrinsic value of work forms the basis of most Goodwill Industries vocational rehabilitation programs and it will be one of the principle components of the programs developed during the Development Program Grant. The primary goal of the International Program of GIA is to assist less developed governments and organizations to strengthen their capacities to serve the poorest majority which includes the physically, mentally, and socially handicapped. Vocational rehabilitation programs are a means to serve these individuals and to help them toward economic independence.

B. Statement of the Development Problem

1. Latin America:

The great majority of Latin American countries do not provide comprehensive vocational rehabilitation services to their physically, mentally, and socially handicapped citizens. The rehabilitation programs provided to these individuals are oriented toward the medical aspects of rehabilitation, e.g., corrective surgery, fitting of prosthetic appliances, psychiatric counseling, etc. These services are certainly essential as part of the

process of restoring disabled individuals to normal functioning levels, but the vocational readjustment and vocational training services are also important in assisting the handicapped to lead productive lives. Medical rehabilitation services alone do not guarantee that the disabled person will be able to resume a normal role in the society as a wage earner.

In many cases, a disabling condition can cause a total change in a persons life, including daily living habits, family relationships, and his employment situation.

The causes of disabling physical conditions can be grouped into five general categories: 1) congenital or early childhood disability; 2) war disability; 3) industrial accident or occupational disease; 4) accident in the street, at home or at play; and 5) illness and disease. The causes of social handicaps can be traced to poverty, lack of adequate education, lack of job skills, and lack of adequate job opportunities, conditions which effectively relegate the socially handicapped person to a marginal status in the society. Handicapped individuals, whether physically, mentally, or socially disabled, must be provided a variety of medical, psychological, and vocational services in order for them to regain or attain a viable position in the social system. These services must be coordinated with, and be sensitive to, the economic conditions found in the society so that individuals are trained for and placed in existing jobs. The accomplishment of these goals is vital to the well being of the handicapped population in any society. Goodwill Industries of America has a particular concern for the Latin American countries and their approaches to the problems of vocational rehabilitation of the handicapped.

In Latin America, Goodwill Industries has made some progress in developing

rehabilitation workshop programs for the handicapped. In 1968 there were 5 Goodwill Industries affiliates and in 1975 there are now 14 in 10 different countries. These programs are locally controlled and financed. They have exhibited an awareness and understanding of the local community needs of the area they serve by providing vocational training and work opportunities for the handicapped. These programs have been a factor in the passage of rehabilitation legislation in some countries and the beginning of cooperation between government and private agencies in meeting the needs of the disabled. One of the greatest needs, and a current obstacle to progress, is additional trained staff, professional, technical and para-professional to administer vocational rehabilitation agencies. Many Latin American countries are now recognizing the need and value of rehabilitation programs but they lack the knowledge of how to develop and implement effective programs.

Government agencies in Latin America have concentrated their limited resources in providing institutionalized care for the disabled on a long term basis or they have selected special target groups such as the deaf-blind for treatment, leaving the vast majority of physically, mentally and socially disabled individuals without any vocational rehabilitation services. A number of factors have contributed to the concentration of services in these areas, with economic restrictions and manpower shortages the most prominent.

Private rehabilitation institutions in Latin America are generally not equipped to provide a comprehensive program of services such as teaching of vocational skills, counseling and guidance, and providing sheltered employment for the physically, mentally, and socially disabled. Reasons

for this situation include lack of trained personnel to carry out these functions, inadequate financial resources, and general lack of knowledge concerning the development and implementation of vocational rehabilitation programs within the economic framework operating in the country. Communities in Latin American countries have shown a willingness to commit their resources to assist the handicapped, but they do not know where to obtain valid information about rehabilitation programs. Quite often the Goodwill national headquarters receives requests for information and technical assistance from elected officials and community leaders in Latin America who are anxious to establish vocational rehabilitation services for local community residents.

In terms of the magnitude of the physically and mentally handicapped population in Latin America, Dr. Robin Hinley-Smith, Latin American Regional Advisor of the Pan American Health Organization, has estimated unofficially that approximately 5.9% of the population is severely disabled (unable to work altogether or unable to work regularly), 4.9% is occupationally disabled (able to work regularly, but unable to do the same work as before the onset of the disability, or unable to work full time), and 6.4% has secondary work limitations (able to work regularly full time, at the same work, but with limitations in kind or amount of work performed). In numbers of people, from a total Latin American population of 291 million, approximately 17 million individuals are severely disabled, 14 million are occupationally disabled, and approximately 19 million persons have secondary work limitations. Obviously, the size of the disabled population and the magnitude of the problem is enormous (approximately 50 million people are vocationally disabled out of a total

population of 291 million, or about 17% of the population). A further breakdown of the physically and mentally disabled population reveals the following unofficial approximations of the numbers and percentages of individuals with each type of reported disability. These figures are based on discussions with Pan American Health Union officials, information from the Statistical Yearbook of the United Nations, and the Statistical Abstract of the United States.

<u>Disability</u>	<u>Disabled Population</u>	<u>Approximate Number Disabled Population</u>
Amputation or Missing Member	3.4	1,700,000
Orthopedic Impairments	17.3	8,650,000
Blindness and Other Visual	8.5	4,250,000
Deafness and Other Hearing	5.2	2,600,000
Cardiac Disease	2.7	1,350,000
Mental Illness	27.1	13,550,000
Mental Retardation	11.3	5,650,000
Digestive System Disorders	9.1	4,550,000
Genito-urinary System Disorders	3.1	1,550,000
Epilepsy	1.5	750,000
Other Disabilities	10.8	5,400,000
TOTAL	<u>100.0</u>	<u>50,000,000</u>

Within each category, it is possible that the disability will result in a definite obstacle to employment for the afflicted individual. The need for restorative and medical services is great, but an even greater need exists for vocational rehabilitation services to restore the individual to the fullest social, vocational and economic usefulness of which he is

capable. Socially disadvantaged and handicapped persons are individuals for whom the conditions of youth, low educational attainment, ethnic or cultural factors, prison or delinquency records or other condition constitute a barrier to employment. Official statistical information regarding the size of this population in Latin America is lacking, but a conservative estimate by some Pan American Health Union officials placed the number between 15 and 20 percent of the total population, or between 40 and 60 million people.

It is apparent from the size of the physically, mentally, and socially disabled population in Latin America that any solution to the problem will require a coordinated and concerted effort on the part of public and private agencies if there is any hope to make inroads into vocationally rehabilitating these individuals. Goodwill Industries of America, Inc. has established an approach to vocational rehabilitation which is flexible enough to be adapted to a variety of social, economic, and financial conditions and yet provide individualized services to the handicapped. The following proposal outlines program needs for rehabilitating the handicapped, and provides a detailed plan of action to develop, design and evaluate the programs. The process of vocational rehabilitation, as outlined in the Introduction, forms the basis for Goodwill Industries programs.

Throughout the process of rehabilitating the disabled, additional special services will be provided to each client. These special services may include occupational therapy, physical therapy, speech and hearing therapy, medical and nursing services, psychological and social services, educational services, personal and social adjustment services, and vocational experience

services. A complete vocational rehabilitation program will have the capability to offer these services to any client in need of special attention, assistance, and counseling. This is the model rehabilitation program that will meet the needs of the handicapped. Goodwill Industries proposes to develop programs specifically designed to fit the conditions and needs of countries in Latin America so that they may take meaningful action to solve their own problems.

Goodwill Industries of America is fully aware of the need to treat the total situation in which a disabled individual might find himself. It is not enough to teach simple mechanical skills to a handicapped person in hopes that it will be sufficient for him to regain a viable position in the economic mainstream of society. Enough has been learned about the problems of the handicapped to design programs which will deal with many facets of the individuals needs. For example, the model rehabilitation program will also provide instruction in the areas of health and nutrition, personal hygiene and grooming, skills of daily living and work adjustment. These efforts are designed to help the person toward maximum independence and self-sufficiency, not only in terms of economic stability, but also in terms of dealing with the complexities of living in a modern, technological society.

Africa:

The under developed countries of Africa, south of the Sahara Desert, share many of the same problems in meeting the needs of handicapped people as were discussed in the section on Latin America. Correspondence with rehabilitation leaders and interested individuals from Nigeria, Senegal, Liberia, Tanzania and Rhodesia indicate that vocational rehabilitation programs are non-existent or at a very primitive stage. These people have

been seeking assistance from Goodwill Industries of America, but we have only been able to give them minimal assistance due to the lack of staff and other resources.

Goodwill Industries of America has assisted two groups in getting Goodwill rehabilitation programs started in Africa. One in Johannesburg, South Africa, which has been in existence for 12 years, and one in Nigeria, which is still in the developing stage with some programs started.

From only the countries mentioned above, there are over 81 million people, with a conservative estimate of 10-15% of the population needing rehabilitation services. This sampling is only a small percentage of the total population of central and south Africa so that it is well established that a great need exists.

It is evident from the limited contacts that we have had that governmental and private groups in Central Africa are receptive to programs that will improve the quality of life for their people. Many of these nations have recently gained independence from colonial rule, and welcome programs that will enable their people to become independent and self-sufficient. Years of warfare, malnutrition and disease have resulted in large numbers of the population being disabled. A comprehensive rehabilitation program is needed to alleviate the problems of the handicapped so that they can become productive members of their society. With the cultural and social upheaval going on in these emerging countries, a careful study of their needs, desires and capabilities will have to be undertaken before more definitive conclusions can be made on the extent of their problems.

III. DEVELOPMENT PROGRAM GRANT PROPOSAL

A. Grant Purpose

The purpose of the development program grant is to strengthen the capacities of Goodwill Industries of America, Inc. so that it can effectively

plan, design and evaluate vocational rehabilitation programs to serve the physically, mentally and socially disabled in Latin America and Africa. The vocational rehabilitation programs which will meet the needs of the poorest majority of less developed countries must have the following characteristics: 14.

1. The capability to assist governments and private organizations in less developed countries to strengthen and expand their programs of providing vocational rehabilitation services to the physically, mentally and socially disabled population where these programs presently exist.
2. The capability to assist governments and private organizations in less developed countries to establish programs of vocational rehabilitation where these programs do not presently exist.
3. The capacity to enhance job opportunities for the physically, mentally, and socially disabled through the provision of vocational rehabilitation services, i.e., assessment and work conditioning, vocational guidance, vocational training, placement and sheltered employment.
4. The capacity to encourage participation by national, regional, and community institutions and organizations to define the problems associated with vocational rehabilitation of the disabled and encouraging these institutions and organizations to provide integrated multi-service programs to meet the needs of this population.
5. The capacity to assist governments and private organizations to train professional and technical personnel in the administration of vocational rehabilitation programs.
6. The capacity to assist in the integration of women into the national economies of the countries as a consequence of increased vocational rehabilitation services.

The Development Program Grant will provide Goodwill Industries of America, Inc. with the financial resources it must have to employ and retain adequate staff to develop vocational rehabilitation programs with the characteristics described above. The addition of program planning and evaluation staff to the Goodwill International Department will increase this departments capacity to plan, design, and evaluate effective vocational rehabilitation programs including the training of professional and technical staff.

The increased capacity provided by the additional staff includes increasing GIA's capability to gather and critically assess information regarding the current state of vocational rehabilitation programs in selected Latin America and Africa. This activity must be coupled with an assessment and evaluation of the vocational rehabilitation needs in these countries in meeting the problems associated with physical, mental, and social disabilities. A comparison between the levels of services currently provided and the needs of the target populations will offer the project staff valuable insights into the directions which the development of suitable vocational rehabilitation programs should take.

The Development Program Grant will also provide the GIA International Department with the capacity to plan for the development of programs to serve the targeted populations. The increased planning capability will be reflected in the formulation of operational goals, short-range and long-range program objectives. Planning activities must deal with the realities of developing low cost, vocational rehabilitation programs in less developed countries. The programs must have wide-scale application

in the particular countries, and be supportable within the levels of resources (manpower and financial) available in Latin America and Africa.

The Development Program Grant will provide the GIA International Department with the staff capacity to evaluate the feasibility of various program alternatives. Vocational rehabilitation program approaches must, of necessity, relate to the economic, social, and political conditions found in the Latin America and Africa. Given the extreme variety of conditions in these countries, designing model programs to meet the needs of the targeted population must include an initial examination of each program approach so that it is consistent with the existing realities. The Development Program Grant will provide Goodwill Industries with this capacity, permitting the project staff to design and develop the most cost effective programs within the parameters of vocational rehabilitation objectives.

B. Expected Outcomes

At the conclusion of the Development Program Grant, a number of specific program accomplishments will be made available to assist less developed Latin American and African countries to develop, improve, and/or expand their capacities to provide vocational rehabilitation services to the physically, mentally, and socially disabled. The primary project outcomes will center around the development of integrated, low cost vocational rehabilitation programs designed to enhance job opportunities for the poorest majority in Latin America and Africa through the provision of vocational rehabilitation services. The programs will conform to the criteria established in the guidelines governing development assistance programs and will combine several services into an integrated approach for helping the

disabled. For example, the teaching of skilled trades to unskilled workers can be combined with medical, social and psychological services to the same individual in preparation for eventual employment. The disabled recipient of rehabilitation services will also be instructed in many areas including health care, family planning, and proper nutrition and diet. An integrated program of this nature has the greatest potential to upgrade the well-being of the poorest majority and strike at the root causes of disabling conditions in the most cost effective manner.

The programs developed during the project will provide adequate evidence of GIA's increased capacity to develop, plan and evaluate vocational rehabilitation programs for less developed countries in Latin America and Africa. At the present time the capacity to carry out a sophisticated program planning and development activity in the area of International Rehabilitation is not available because Goodwill Industries lacks the necessary staff. The basic revenue sources of GIA are restricted, leaving the International Program without the necessary budget. However, the Development Program Grant will improve the situation by allowing for additional staff having skills in program development, planning, and evaluation. The outcomes of the project may include some, if not all, of the following program activities and program materials.

1. Step by step description and explanation of how to establish comprehensive vocational rehabilitation programs in countries which have had no experience with vocational rehabilitation programming. The program materials developed will lay out the basic principles and philosophy of vocational rehabilitation, and will provide descriptions about the process of rehabilitation

and will spell out the costs for each type of program model, e.g., manpower, equipment, physical facilities, materials, etc. The need for comprehensive, coordinated programs will be stressed in the printed materials so that the vocational rehabilitation program model will truly increase the economic prospects of the disabled clients receiving services.

2. Manuals and other printed materials describing the most effective methods and procedures to evaluate current, ongoing vocational rehabilitation programs in Latin America and Africa. Many programs in operation lack the necessary techniques to objectively evaluate their overall performance in terms of cost effectiveness and management efficiency. Consequently, many programs do not serve as many disabled individuals as they otherwise would if their operational efficiency were increased. Identifying wasted activities in the rehabilitation process and eliminating them, restructuring the intake and assessment function to screen out non-eligible clients, instituting management procedures to monitor and control staff performance, setting out objectives of each program department, etc., all of these management practices will be thoroughly discussed. The primary purposes of the manuals will be to upgrade the performance of the professional and para-professional staff, streamline the total service delivery system, increase the quality of services rendered, and provide useable management controls for the administration of vocational rehabilitation programs.

3. A third possible outcome of the Development Program Grant would be a plan to establish several leadership training centers in Latin America and Africa. The need for training centers is already evident and a growing program of vocational rehabilitation will require increasing numbers of trained professional, technical and para-professional staff to administer the emerging programs. Two or three regional training centers would provide training for administrators and managers in the operation of vocational rehabilitation programs and facilities. Technical staff would also undergo intensive training in areas relating to their program orientation. The training centers would continue to provide supporting services and technical expertise for the development of additional rehabilitation workshops.

4. Another possible outcome from the project activities might include a comprehensive program of information aimed at selected Latin American and African countries which have shown a willingness to develop programs for the disabled. The purpose of disseminating the program information is to increase the level of awareness regarding the needs of the disabled among the general population so that communities would seek assistance in implementing programs of vocational rehabilitation. A considerable amount of evidence suggests that most Latin American and African governments do not have the financial resources to develop a nationwide network of rehabilitation workshops to serve the handicapped. Given this situation, any effort to establish comprehensive programs in Latin America and Africa must rely heavily on voluntary community organizations seeking to establish viable programs to assist.....

community residents. Community leaders and influential citizens must have information available to them about the kinds of programs and services that can be established locally, how these programs of vocational rehabilitation can be implemented, and the costs of starting up and operating a rehabilitation workshop. The development program grant will permit GIA to develop a comprehensive package of information, explaining the needs of the physically, mentally, and socially disabled, outlining the services that the Goodwill program can make available to a community, and soliciting requests for additional program information. Cooperation will be sought with government agencies and health and welfare organizations in selected Latin America and African countries in an attempt to focus the maximum amount of attention on the needs of the handicapped segment of the population. An increased level of awareness among the community leaders and influential citizens coupled with easily understood step-by-step procedures about how to establish a viable program should lead to an increase in the number of vocational programs in these countries.

5. A fifth possible outcome would be the development of a detailed plan to establish an integrated vocational rehabilitation program/training center in one country, as a model for establishing additional programs/centers in other Latin American and African countries. This plan would seek to integrate the resources of the government Ministries of Health and Education, International Labor Organization, Partners of America, and existing community resources.

IV. PROJECT NARRATIVE

A. Program Goal

1. Statement of the Goal: The broader objective to which this project contributes is the development of capabilities of local institutions within less developed countries to improve the quality of life of handicapped people.

2. Measurement of Goal Achievement:

a. Capabilities of existing institutions will have been improved and expanded.

b. Available local participation will have been enhanced.

c. Increased understanding of all aspects of a rehabilitation delivery system will have been developed.

3. Means of Verification: Goal achievements will be verified by documentation from Goodwill Industries of America, reports, field visits, and USAID site visits and reports.

4. Assumptions: Assumptions for achieving goal targets are:

a. That the rehabilitation problem solving approach of Goodwill Industries of America is accepted by the host country governments.

b. That a responsible LDC organization, government or private, realizes the need and welcomes assistance from Goodwill Industries of America.

c. That basic local human and material resources are available.

B. Project Purpose

1. Statement of Purpose: The purpose of the development program grant is to strengthen the capacities of Goodwill Industries of America, Inc. so that it can effectively plan, design and evaluate vocational rehabilitation programs to serve the physically, mentally and socially disabled in Latin America and Africa.

2. End of Project Status (EOPS): Goodwill Industries of America intends to maximize its program performance in wide spectrum with the following results at the end of this DPG period:

a. Analysis, evaluation and determination of needs of the handicapped in (1) one African country and (2) two Latin American countries completed by 1977, and programs designed to meet these needs by 1978.

b. Written materials to assist implementation of programs in urban and rural areas of 50,000 people or more, completed by 1978.

c. A plan to establish training centers in one Latin American and one African country to train technical and para-professional staff for rehabilitation facilities by 1978.

3. Means of Verification: The accomplishment of the above indicators will be verified by G.I.A. documentation, reports, field visits, USAID site visits, visits to G.I.A. headquarters by appropriate A.I.D. personnel and by technical outputs reviewed by appropriate A.I.D. offices.

4. Assumptions: In order to obtain the conditions for the project to achieve its purpose, it is assumed that, a) G.I.A. approach proves to be valid and viable; b) current G.I.A. funding support will be expanded to achieve institutional purposes, and c) the target population will accept G.I.A. and its method of approach.

C. Project Outputs

1. Outputs and Output Indicators: The outputs to be obtained from the grant and its indicators will be:

- a. An expanded development staff. Program staff will have been increased by 6 professionals and 1 clerical.
- b. Additional planning, programming and evaluation capability. With the addition of the professional staff and clerical and logistic support, the planning, programming and evaluation systems will be operative.
- c. Developed rehabilitation program models. An indicator will be a designed rehabilitation program model, including implementation, operation and evaluation, applicable in other areas of need.

2. Means of Verification: The project outputs will be verified by review of the payroll records, accounting records, the instruction documentation and training manuals for rehabilitation delivery systems and by site visits and USAID reports.

3. Assumptions: The listed outputs are dependent on several factors, such as that the DPG is funded at the level requested and that qualified personnel is available.

D. Inputs

1. Inputs from A.I.D.

A Development Program Grant

2. Inputs from others

- a. GIA membership dues.
- b. GIA International Council dues
- c. Private individuals and corporations
- d. Foundations

3. Baseline Data

A baseline data will be developed during the first six months of the grant.

V. COURSE OF ACTION

A. Implementation Plan

The Development Program Grant will provide the resources necessary to employ staff at GIA to conduct development, planning and evaluation activities. These activities will focus on four major subject areas as they relate to the specific conditions found in the selected Latin American and African Countries. These four areas include, 1) determining the specific vocational rehabilitation needs of the handicapped in relation to the number of disabled and types of disabilities of this handicapped population; 2) determining the level of services currently available and analyzing the service delivery systems as they presently operate; 3) assessing the resources and support available from the public and private sectors to determine the type and scope of programs that might be supported; 4) developing integrated programs with local communities and governmental agencies (Ministries of Health and Labor, for example), designed to serve the maximum number of handicapped at the lowest cost. The operation of these programs must be within the financial and manpower resources available in the country.

The timetable for the three year project separates the four areas of activity into the following time frames:

1. Time Frame One - Employment of project staff and establishment of proper procedures and schedules for the three year project. Selection of target Latin American and African countries based on the following criteria: the representative nature of the country in relation to similar characteristics of other L.A. and African countries; the country's

perceived willingness to consider adopting or expanding vocational rehabilitation programs for the physically, socially, and mentally handicapped; the resources that could be made available in developing appropriate programs; and other criteria to be determined by the project staff. It is anticipated that at the most two countries will be selected for extensive analysis in anticipation of development program activities. Also, during the time frame one, the staff will undertake an in-depth analysis of the specific rehabilitation needs of the physically, mentally, and socially disabled in the selected countries. The focus will be on determining the number of handicapped individuals in the total population by the type of disability. This activity will require considerable assistance from government agencies in the target countries since the demographic data regarding handicaps is generally not collected on a regular basis.

The data will be assessed in light of the economic conditions found in the countries in preparation for the eventual development of integrated rehabilitation programs. If it were found, for example, that the high rate of unemployment existing in certain countries precludes quick assimilation of trained handicapped workers into the labor force, the project staff would perhaps explore more traditional sheltered and terminal workshop models as possible program approaches.

In the process of determining the demographic characteristics of the handicapped and the economic/manpower requirements of the labor market, • the staff will also investigate related health and nutrition problems

found in the countries, e.g., availability of program information for child care, nutrition and diet, general hygiene, etc. Vocational rehabilitation programs should include educational components which instruct handicapped clients in these areas, in addition to equipping them with marketable skills. Information regarding proper practices in these health areas and the current state of public knowledge of these matters will serve to direct program planning activities toward maximizing the instructional opportunities for the handicapped population who receive rehabilitation services. The thrust of activities during time frame one will be to determine the extent of the needs for vocational rehabilitation in selected Latin American countries as a basis for moving into time frame two, the assessment and analysis of current levels of services available to the handicapped.

2. Time Frame Two - The project staff will undertake a thorough assessment of the current levels of vocational rehabilitation services that are available to the physically and mentally handicapped in the selected L.A and African....countries. Current evidence suggests that most countries do not provide extensive vocational rehabilitation services and those services which do exist reach only a small portion of the potential client population. An analysis of the current service delivery systems will provide valuable knowledge into the possible alternative methods that could be implemented to reach a greater number of handicapped without over-extending the resources available. Of particular interest in this analysis are the relationships between private organizations and public governmental agencies, i.e., how do they interact to coordinate services, are there efforts to avoid

possible duplications, is there cooperation to focus on specific disability groups in the population, etc. The extent to which there is interaction and cooperation will have important consequences for developing viable alternative program approaches to deal with the handicapped population.

Another important issue to be investigated during time frame two concerns the possible restructuring of present service delivery systems without materially altering their focus or target populations. This would involve primarily a reorientation of the procedural aspects of the program, i.e., decentralization of rehabilitation workshops in a quasi-satellite model in order to bring the facilities closer to the people being served. Another possible restructuring of the current process might involve a shift in emphasis toward sub-contract operations as a means to train more handicapped clients for placement in competitive employment. It is believed that there are a number of relatively inexpensive changes in process that might dramatically increase the number of clients being served and at the same time decrease the costs of the services to the handicapped.

The primary purpose for gathering information about the program operation, levels of services, number and types of clients being served, etc., is to provide insight into establishing, expanding, and/or restructuring the rehabilitation program and service delivery systems to increase efficiency and effectiveness. Information gained from this analysis will benefit not only those programs already in existence, but will direct the project staff toward establishing

a process of developmental stages of vocational rehabilitation program implementation. It may be found for example, that many countries are reluctant or unwilling to undertake sophisticated and/or innovative programs without having some assurance that these programs will be cost-effective. Under these conditions, the development of vocational rehabilitation programs will have to begin with a "demonstration" model to provide evidence that the concept and approach are viable, cost-effective methods to treat the physically and mentally handicapped. It is apparent that the analysis of service delivery systems will play a guiding role in the ultimate development of rehabilitation programs.

3. Time Frame Three - After determining the needs for vocational rehabilitation in the selected countries, and after assessing and evaluating the current service delivery system operations, the project staff will conduct a study of the resources which are currently available or which could be made available in support of different vocational rehabilitation program approaches. This study will begin by spelling out, in considerable detail, the requisite components of the various types of vocational rehabilitation program models that might be incorporated in the selected countries. For example, there are several variations of the sheltered workshop model, each having a different clientele, program orientation, and expected outcomes. For example, the Work Activities Center model would serve the most severely mentally handicapped (individuals with I.Q.'s below 50), and the work being performed would be inconsequential. Its purpose would be to maintain these handicapped individuals without hope of moving them into employment, yet provide them special supportive services and some economic benefits. This type of program model will require a considerable amount of financial subsidy from public and private

sources to maintain staff, the wage structure, the physical plant, etc., since the W.A.C. will not be able to generate much of its own revenue.

The Terminal Sheltered Workshop, on the other hand, would serve less severely disabled clients than the W.A.C., but those clients, after thorough testing and evaluation, would have been found not capable of engaging in competitive employment because of the physical or mental disabled. However, they are capable of some productive activities and of doing some piece work at a reduced rate in a sheltered workshop environment. Thus, they can be paid a wage based on their own capacity to work. The materials they produce are sold and help to provide revenue for client wages, staff salaries, etc. of the sheltered workshop. This program model does not require as much direct financial subsidy as the W.A.C. model because goods are being sold by the handicapped clients, but there is an increased need for special supportive services associated with this approach. These supportive services might include counseling, day care services, personal hygiene and health care instruction, etc. The provision of these services requires additional personnel to instruct and counsel the handicapped clients and these costs must be borne by public and private sources to the extent possible.

Clients served in a Terminal Sheltered Workshop do gain a measure of financial independence through sheltered employment. They are taught skills of daily living, health care and nutrition, and are given counseling and guidance pertaining to their roles in the society as handicapped individuals. Direct government support of these handicapped individuals decreases quite dramatically once they begin to earn wages

on a regular basis.

The Transitional Sheltered Workshop serves those handicapped clients who have the greatest potential for training and eventual employment in the competitive labor market. These individuals are physically, socially and mentally handicapped, but are capable of acquiring new or additional skills with which they can compete for available jobs in the competitive job world. This type of rehabilitation program model requires an experienced staff of evaluators, trainers, counselors, placement specialists and supportive personnel to effectively train and place handicapped clients. Fortunately, these additional overhead costs are partially offset by the increased productive capacity of the clients. As clients are trained in specific skill areas, they are actually receiving instruction in a real work setting within the sheltered workshop. The products they manufacture or refurbish are sold to the public, the revenue coming back to the clients in the form of wages and benefits. The sale of materials and goods also helps to support the workshop staff and permits the workshop to exercise considerable autonomy from direct public and private funding sources.

The purpose of the Transitional Sheltered Workshop is to place clients in employment. This is accomplished after evaluation, training, work adjustment, and counseling have taken place. Clients go on to become wage earners in the labor market and gain a considerable amount of economic independence. The requirements for direct subsidization of the Transitional Sheltered Workshop are less than those for the W.A.C. or the Terminal Sheltered Workshop. However, there is a much greater need for experienced and trained therapists, evaluators, counselors

and vocational trainers who will prepare the client to enter the labor market. The personnel requirements at their level of program sophistication are quite high and the need is for a pool of trained vocational rehabilitation personnel in order for the program to operate effectively.

During time frame three, the project staff activities will specifically focus on the financial and manpower requirements of each of the various vocational program models, the types of clients each model will serve, etc., and then assess the availability of the financial and manpower resources in the selected countries. Such analysis will provide valuable knowledge to be used during the development of viable programs in time frame four.

4. Time Frame Four - During this terminal phase of the project, the staff will bring together all of the information gathered and evaluated during the previous time frames as a basis for developing realistic and viable vocational rehabilitation programs. The program models developed during time frame four will take into consideration the needs of the handicapped population as well as the manpower and financial resources required and available, relating these factors to the current operational levels of service delivery systems and the perceived willingness of the country's government to support new or innovative program approaches. In this manner, the vocational rehabilitation programs that will be developed will be based on realistic criteria and will take into account the important elements of governmental endorsement and support. The final project outcomes will be rehabilitation programs geared to the conditions and situations found

in the particular country, and established within a realistic framework of the country's customs, national values, and economic realities.

Manuals and handbooks on the implementation of the programs will be written and distributed to interested governmental agencies, private organizations, and community leaders in the selected countries during time frame four. These "how-to-do-it" materials will provide a valuable source of information in encouraging the Latin American countries to adopt and/or adapt viable program models to serve the physically, mentally and socially handicapped. It is anticipated that close liaison will be maintained with appropriate government agencies in the selected countries throughout the process of information gathering, assessment, and program development. In this manner, the government officials will have ample opportunity to make recommendations and suggestions to project staff as to the nature of the vocational rehabilitation programs most needed and appropriate in their country.

One of the first project activities will be to establish Cooperative Councils composed of government officials, leaders of private social welfare organizations, and leaders of the business and industrial communities to review the progress toward accomplishing the project objectives and to advise and recommend appropriate steps in the program development process. Input from these individuals will enhance their willingness to support and sustain the emerging program models through public endorsement, financial support, and cooperation in finding jobs for the handicapped. Ultimately, the emerging rehabilitation programs will enhance job opportunities for the handicapped,

and will offer them an opportunity to become self-sufficient and economically independent.

B. Project Staff and Job Descriptions

In order to carry out these complex and multi-faceted activities, the following staff will be required for the three year duration of the project:

1. Project Director
2. Program Planner
3. Research Assistant - Evaluation
4. Regional Representative
5. Secretary

All but the regional representative will be located at the national headquarters of Goodwill Industries of America, Inc. in Washington, D.C. The regional representative will be located in the selected country and will devote 100% of his/her time to the activities of the Development Program Grant. Job descriptions for each of the professional positions are attached.

JOB DESCRIPTION

Project Director - Goodwill International Project

I. General Responsibilities

- A. Member of the GIA senior staff and reports directly to the President of GIA.
- B. Administers and implements the Development Program Grant to organize, plan, and evaluate vocational rehabilitation programs in less developed countries to serve the physically, mentally, and socially handicapped.

II. Specific Responsibilities

- A. Supervises project staff and directs all phases of the planning, designing, and evaluating of vocational rehabilitation program models.
- B. Establishes and maintains contact with appropriate governmental agencies and private health and welfare organizations in the United States and abroad to coordinate the data gathering and planning activities of the project.
- C. Serves as a representative of Goodwill Industries of America, Inc. to the Cooperative Councils which are comprised of foreign government officials, officials of private health and welfare agencies, and business and industrial leaders of those countries interested in vocational rehabilitation programs.
- D. Directs and participates in the gathering of selected demographic data concerning disabilities, levels of program operation, and the economic conditions found in the target countries.

- E. Directs and participates in the analysis of the collected data, coordinating the staff efforts with information disseminating agencies abroad and in the United States such as the World Health Organization, Pan American Health Union, UNESCO, Organization of American States, International Labor Organization, etc.
- F. Directs and participates in the development of appropriate vocational rehabilitation program models including the writing of manuals and handbooks on how to implement the program models. Responsible for preparation of the final report of the project.

III. Job Specifications

- A. Education - Masters Degree or equivalent in Social Work, Sociology, Political Science or related area. Preferrably, individual should have a working knowledge of at least one foreign language.
- B. Experience - Five years or more in the field of vocational rehabilitation of the physically, mentally, and socially handicapped. Travel in foreign countries, exposure to international rehabilitation programs and familiarity with program planning and evaluation principles are important, but not essential. At least 5 years of administrative experience in directing the activities of many staff in multi-faceted activities is required.

JOB DESCRIPTION

Program Planner - Goodwill International Project

I. General Responsibilities

Under the direction of the Project Director, performs the following functions:

- A. Conducts program planning activities of the project in coordination with the Project Director.
- B. Prepares and writes materials regarding program approaches developed from the data gathering process.
- C. Assists Project Director in maintaining contact and liaison with government agencies and health and welfare agencies in the United States and abroad.

II. Specific Responsibilities

- A. Designs and prepares data gathering documents to be used in collecting demographic information about the types and numbers of disabilities of the target population.
- B. Assists in planning the methodology of data collection with the Project Director.
- C. Prepares documentation of information needs regarding the present level of program services currently available in selected Latin American countries.
- D. Makes and maintains appropriate contact with counterparts in governmental agencies and private health and welfare agencies in the U.S. and abroad so that information can be exchanged efficiently.

- E. Assists in the analysis of collected data, e.g., demographic information, economic conditions, levels of available resources, current program delivery systems, etc.
- F. Develops goals, objectives and action steps for the implementation of the vocational rehabilitation program models in selected foreign countries. This is done within the framework of the planning strategy which considers the various identifiable factors impinging on the process of program implementation.
- G. Assists in the development and writing of manuals and handbooks concerning the implementation of the program models. Also assists the project director in preparing the final report.

III. Job Specifications

- A. Education - A Masters Degree in Public Administration, Research Methodology, Operations Research or a related field is required. Knowledge of a foreign language is preferred.
- B. Experience - At least three years in the field of health and social welfare in program planning and evaluation activities. Knowledge of the principles of vocational rehabilitation and the techniques of applied research and statistical analysis is also preferred, but not essential.

JOB DESCRIPTION

Research Assistant - Evaluation - Goodwill International Project

I. General Responsibilities

Under the supervision of the Project Director, performs the following functions:

- A. Participates in the development of data gathering instruments including questionnaires and interview schedules.
- B. Conducts literature searches for available data pertaining to vocational rehabilitation program needs.
- C. Analyses collected data and prepares preliminary reports for staff review and discussion.

II. Specific Responsibilities

- A. Prepares the instruments, instructions, and devises the methodology for obtaining the required information from government agencies, private health and welfare organizations and identified rehabilitation workshops.
- B. Conducts searches of the literature for available information with which to supplement data gathered directly by project staff. Preliminary review of current data will feed into the planning process for gathering additional information.
- C. Assists in the collection, editing and coding of data from primary and secondary sources. Performs statistical manipulation of data at an elementary level (computation of means, medians, frequency distributions, etc.).
- D. Prepares statistical and narrative summaries of materials and participates in staff discussions of project objectives and program approaches.

III. Job Specifications

- A. Education - A Bachelors Degree in Sociology, Psychology, Statistics, Operations Research, with emphasis on research methodology is required.
- B. Experience - At least one year experience in the field of social science research, program planning or related fields. Knowledge of the principles of vocational rehabilitation and a foreign language are preferred, but not essential.

JOB DESCRIPTION

Field Representative - Goodwill International Project

I. General Responsibilities

Under the general direction of the Project Director, performs the following functions:

- A. Maintains contact and liaison with government agencies, private health and welfare agencies, and business and industrial leaders in the selected target countries.
- B. Serves as a coordinating link between the Goodwill International Project staff and officials, agencies, and organizations in the target countries to maintain effective exchange of program information.
- C. Gathers program data and transmits it to Goodwill International Project Staff for review and analysis.

II. Specific Responsibilities

- A. Identifies, makes contact, and maintains liaison with government officials, private health and welfare agency leaders, and business and industrial leaders in the selected Latin American countries for purposes of gathering and disseminating information.
- B. Serves as source of program information to these leaders so that they are made aware of and understand the goals and objectives of the project. In this capacity, the field representative actively seeks their suggestions and recommendations.
- C. Coordinates the activities of the Cooperative Councils by setting up appropriate meetings, making arrangements for conferences with the GIA project staff, and preparing materials for discussion and distribution.

- D. Represents Goodwill Industries of America, Inc. in the absence of the Project Director and presents and promotes the objectives of the International Program of GIA.
- E. Conducts special studies upon the request of the Project Director and prepares reports, statistical analyses, and descriptive reviews of various social and cultural conditions found in the selected Latin American countries.

III. Job Specifications

- A. Education - Bachelors Degree or equivalent in the area which relates to the vocational rehabilitation of the handicapped. The field representative should be familiar with the Latin American countries where the programs are being developed.
- B. Experience - At least three years experience in the field of vocational rehabilitation. Familiarity with the Goodwill Industries approach to rehabilitation is required. Knowledge of and familiarity with the political, governmental and private social welfare structures of the target countries is also preferred.

Goodwill Industries of America, Inc. - Development Program Grant

Combined Budget - Latin America and Africa

<u>BUDGET</u>	<u>1st year</u>	<u>2nd year</u>	<u>3rd year</u>
Direct Expenses		(7% INCREASE)	
1. <u>Personnel</u>			
Project Director	\$ 25,000	\$ 26,750	\$ 28,625
Program Planner	20,000	21,400	22,900
Evaluator - Africa	12,500	13,375	-
Evaluator - Latin America	12,500	13,375	-
Field Representative - Latin America	6,000	6,420	6,870
Field Representative - Africa	6,000	6,420	6,870
Secretary	8,400	8,990	9,600
SUBTOTAL	\$ 90,400	\$ 96,730	\$ 74,865
2. <u>Fringe Benefits</u> - 20% of salary costs - includes FICA, Unemployment Insurance, Workmen's Compensation, Long Term Disability Insurance, Accident and Life Insurance, Medical and Hospitalization Insurance, and Retirement and Pension	\$ 18,080	\$ 19,346	\$ 14,973
3. <u>Staff Travel</u>			
Latin America			
2 trips, Project Director	\$ 2,800	\$ 2,800	\$ 1,400
2 trips, Program Planner	2,800	2,800	1,400
2 trips, Field Representative to U.S.	2,160	2,160	1,080
SUBTOTAL	\$ 7,760	\$ 7,760	\$ 3,880
Africa			
Project Director	\$ 3,600	\$ 3,600	\$ 1,800
Program Planner	3,600	3,600	1,800
Field Representative to U.S.	1,480 (1)	2,960 (2)	1,480
SUBTOTAL	\$ 8,680	\$ 10,160	\$ 5,080
4. <u>Conferences for Project Staff</u>			
1 trip to Pan American Conference	-	\$ 1,500	-
2 trips to Conference in U.S. - Project Director	\$ 2,000	2,000	\$ 2,000
1 trip to Europe - Rehabilitation Program Planning	1,500	-	-
SUBTOTAL	\$ 3,500	\$ 3,500	\$ 2,000

	<u>1st year</u>	<u>2nd year</u>	<u>3rd year</u>
5. <u>Staff Training</u>			
Language Instruction	\$ 2,000	-	-
Two 2 week training sessions for African Field Representative	1,800	-	-
5 field visits to Goodwill Ind. for orientation - Project Director and Program Planner	3,200	-	-
	<hr/>	<hr/>	<hr/>
SUBTOTAL	\$ 7,000		
6. <u>Logistical Support for Field Office</u>			
Secretary, Latin America (part time)	\$ 1,500	\$ 1,600	\$ 1,700
Secretary, Africa, (part time)	1,500	1,600	1,700
Office Supplies, Equipment	3,000	1,000	1,000
Travel - Latin America	2,000	2,000	2,000
Travel - Africa	2,000	2,000	2,000
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SUBTOTAL	\$ 10,000	\$ 8,200	\$ 8,400
7. <u>Printing</u>	\$ 1,000	\$ 4,000	\$ 8,000
8. <u>Office Supplies and Equipment</u>	\$ 3,000	\$ 1,500	\$ 1,500
TOTAL DIRECT EXPENSES	\$ 149,420	\$ 151,196	\$ 118,698
TOTAL INDIRECT EXPENSES	\$ 22,413	\$ 22,679	\$ 17,805
GRAND TOTAL	\$ 171,833	\$ 173,875	\$ 136,503

GOODWILL INDUSTRIES OF AMERICA, INC.
DEVELOPMENT PROGRAM GRANT
COMBINED BUDGET - AFRICA/LATIN AMERICA

	<u>1st Year</u>	<u>2nd Year</u>	<u>3rd Year</u>
<u>DIRECT EXPENSES</u>			
<u>PERSONNEL</u>			
Project Director	\$ 25,000	\$ 26,750	\$ 28,625
Program Planner	20,000	21,400	22,900
Evaluator - Africa	12,500	13,375	-
Evaluator - Latin America	12,500	13,375	-
Field Representative - Africa	6,000	6,420	6,870
Field Representative - Latin America	6,000	6,420	6,870
Secretary	8,400	8,990	9,600
SUB TOTAL	\$ 90,400	\$ 96,730	\$ 74,865
<u>FRINGE BENEFITS</u>	\$ 18,080	\$ 19,346	\$ 14,973
20% of salary costs - includes FICA, Unemployment Insurance, Workmen's Compensation, Long Term Disability Insurance, Accident and Life Insurance, Medical and Hospitalization Insurance, and Retirement and Pension.			
<u>STAFF TRAINING</u>			
Language Instruction	\$ 2,000	-	-
Training Sessions - 2 Two-week sessions for African Field Representative	1,800	-	-
Field Visits - 5 field visits to Goodwill Industries for orientation for Project Director and Program Planner	3,200	-	-
SUB TOTAL	\$ 7,000	-	-
<u>PRINTING</u>	\$ 1,000	\$ 4,000	\$ 8,000
<u>OFFICE SUPPLIES AND EQUIPMENT</u>	\$ 3,000	\$ 1,500	\$ 1,500
A.I.D. REQUESTED SHARE	\$119,480	\$121,576	\$ 99,332

D. Evaluation Plan

The evaluation of the project will depend upon establishing the objectives and quantitative indicators of the development program. What is the purpose of the Development Program Grant and what are the expected outcomes? The answers to these questions will provide a point of departure for quantifying the objectives and goals so that they can be measured empirically. These measures of program achievement will also allow staff to gauge their progress toward accomplishing the project goals within the specified time frames.

Measures or indicators of achievement of program objectives will be directly related to the following empirically verifiable activities:

1. Recruitment and employment of the program staff at Goodwill Industries of America, Inc. This activity is the primary objective during the first few months of the project. Without a qualified staff, there is little hope of accomplishing any of the project objectives.
2. Development of criteria for selecting the country or countries toward which the program development activities will be directed. A number of factors must be included in the establishment of proper selection criteria and the project staff must spell these out in considerable detail. At the conclusion of their effort, the country or countries will be selected.
3. Establishment of Cooperative Councils in the selected target country(s) comprised of government officials, leaders of private health and welfare organizations, and leaders of the business and industrial community. Once organized, the Cooperative Council will meet at least once a year throughout the duration of the project to review and make recommendations about project objectives. The establishment of the Cooperative Councils will be done during time frame one.

4. Development of information requirements, design of data gathering instruments, and selection of potential respondents. This activity will also include developing a detailed strategy concerning the data gathering methodology, how the primary and secondary information sources will be approached, and how the data will be analyzed. This effort will be a part of the activities during time frames two and three, and will include the production of reports and statistical analyses covering the types and numbers of the disabled in the selected country(s), the vocational rehabilitation needs to serve this handicapped population, the present level of services and how they are delivered to the disabled, and the resources which could be made available to establish, expand and/or restructure the vocational rehabilitation programs in the country(s).
5. Development of vocational rehabilitation program models in considerable detail, laying out the specific needs for manpower, training, the physical plant, financial resources, equipment, administration, etc. Also included in the development of these program models will be an analysis of the conditions and circumstances which are most favorable for implementing each of the different program models. This analysis will be particularly valuable to government officials and community leaders as they begin the process of selecting the types and scope of programs that are viable in their specific situations. This activity will take place during time frame four and will include development of special studies, reports, manuals, and other informational materials for distribution to government officials and individuals interested in establishing vocational rehabilitation programs.

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The evaluation of a development program project must rely on materials and programs that are produced and on empirical measures of the accomplishment of the stated objectives. During the operational stage of program implementation which calls for assisting selected countries to implement and operate the vocational program models developed during the course of the Development Program Grant, the program evaluation efforts will emphasize the effects, changes, and observable modifications that result or do not result from the use of the materials and the technical assistance provided by staff. Relating the empirically measurable changes to the expected or anticipated changes in programs will provide a means for evaluating the effectiveness of the vocational rehabilitation program models developed during the development program grant.

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E. Disabilities - Types and Processes for Determining Eligibility

All types of disabilities will be served including physical impairment, medical limitations, mental health problems and social handicaps with the limitation that they have the potential to be trained to take their place in society in either (1) competitive employment (2) self-employment or (3) as sheltered workshop employees. The emphasis of the rehabilitation program is to prepare handicapped individuals for employment and if the prognosis is that this goal is not feasible for the individual, a determination must be made that the rehabilitation facility has no services to offer that individual.

This determination is made through an evaluation process that includes

1. Medical examination
2. Psychological testing when appropriate
3. Testing for mental and physical functioning level
4. Counselor/social worker interview to develop social profile and previous work record
5. Application of individual for services

A staffing is then held by the individuals conducting the evaluation at which time a determination is made for eligibility for receiving rehabilitation service based on the findings of the evaluation team.

F. How Federal or Local Government Agencies Can Be Partners in the Rehabilitation Program

It has already been demonstrated in some developing countries that governmental agencies are willing and are participating in one or more

of the following ways:

1. Providing a percent (%) of private voluntary rehabilitation agencies budget as a grant.
2. Providing land or buildings owned by the government.
3. Provide instructors from state vocational training schools.
4. Provide medical and other professional services either at government-operated facilities or at the rehabilitation facility.
5. Participate in liaison committees or councils made up of government representatives and public/private agencies dealing with social problems.

VI. Role of Women in GIA

There are women at all levels of management and professional services in the Goodwill movement. At the national office of GIA, there are two women in executive staff positions. At the local level, there are several women holding the top management position of executive director. In addition, women commonly hold positions of responsibility ranging from the operations director to floor supervisors. In the professional fields, women are prominent in the medical field, rehabilitation directors and counselors, social workers, etc.

In Latin America, eleven (11) out of the twelve (12) Goodwill affiliates have women for executive directors.

Women also hold positions of responsibility as volunteers by being Board members in all Goodwills and in auxiliaries.

**PROJECT DESIGN SUMMARY
LOGICAL FRAMEWORK**

Life of Project:
From FY _____ to FY _____
Total U. S. Funding _____
Date Prepared: _____

VII
Project Title & Number: GOODWILL INDUSTRIES OF AMERICA (GIA) No. 950-082

MARRAT: 2 SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
<p>Program or Sector Goal: The broader objective to which this project contributes: To develop the capabilities of local institutions within less developed countries to improve the quality of life of the handicapped people.</p>	<p>Measures of Goal Achievement: 1. Capabilities of existing institutions will have been improved and expanded. 2. Available local participation will have been enhanced. 3. Increased understanding of all aspects of a rehabilitation delivery system.</p>	<p>Goodwill Industries of America (GIA) documentation, reports, field visits, USAID site visits and reports.</p>	<p>Assumptions for achieving goal targets: 1. That the rehabilitation problem solving approach of GIA is accepted by host country governments. 2. That a responsible LDC organization, government or private, realizes the need and welcomes assistance from GIA. 3. That basic local human and material resources are available.</p>
<p>Project Purpose: An operational GIA capable to develop leadership and provide assistance to organizations in less developed countries, in their efforts to help the physically and mentally handicapped and socially disadvantaged to attain their fullest individual potential development by (a) improving the quality and effectiveness of their rehabilitation services, (b) providing guidance to their programs and (c) allowing GIA to adjust to the needs of a changing society. d. Establishing a Planning and Program Development staff.</p>	<p>Conditions that will indicate purpose has been achieved: End of project status. 1. Analysis, evaluation, determination needs of handicapped in 1 African/2 LA countries completed by 1977. Programs designed to meet needs by 1978. 2. Written materials to assist implement programs in urban/rural areas of 50,000 people or more. 3. Plan developed for training centers in 1 LA/1 African country to train technical/para-professional staff for rehabilitation facilities by 1978.</p>	<p>GIA documentation, reports, field visits, USAID site visits. Visits to GIA Hq. by appropriate AID personnel. Technical outputs reviewed by appropriate AID office.</p>	<p>Assumptions for achieving purpose: 1. GIA approach proves to be valid and viable. 2. Current GIA funding support will be expanded to achieve institutional purposes. 3. The target population will accept GIA and its method of approach.</p>
<p>Outputs: 1. Expanded development staff. 2. Additional planning, programming and evaluation capability. 3. Developed rehabilitation program models.</p>	<p>Magnitude of Outputs: 1. Program staff increased by 6 professionals and 1 clerical. 2. Planning, programming and evaluation systems operative. 3. Designed rehabilitation program models, including implementation, operation and evaluation, applicable in other areas of need.</p>	<p>1. Payroll records. 2. Accounting records. 3. Instruction documentation and training manuals for rehabilitation delivery system. 4. Site visits and USAID visits.</p>	<p>Assumptions for achieving outputs: 1. That the DPG is funded at the level requested. 2. That qualified personnel is available.</p>
<p>Inputs: 1. NTG from A.I.D. 2. GIA membership dues. 3. GIA International Council dues. 4. Private individuals and corporations. 5. Foundations.</p>	<p>Implementation Target (Type and Quantity) (Budget) (Implementation Plan)</p>		<p>Assumptions for providing inputs:</p>

VIII. REPORTING AND EVALUATION

A. GIA will report progress to AID/W in accordance with the Implementation Work Plan.

B. The evaluation schedule which is proposed will consist of the following three types:

1. Informal status analysis to be performed by PHA/PVC Project Manager as regular monitoring practice, with frequency as determined by the reporting from GIA.

2. A non-intensive (meaning a regular PAR) evaluation performed by an AID/W team prior to the end of the first and second years of the grant. This evaluation will be adequate to gauge progress and identify bottlenecks. Furthermore, it will determine if continuation of the Grant is justified.

3. At the end of the grant, if the record of the grant should indicate the necessity of an intensive evaluation to determine possibilities of replication elsewhere, or continuation of support to the same institution, outside consultants will be engaged to make an evaluation outside the AID/W influence.

PHA/PVC/OPNS:10/20/75

GOODWILL INDUSTRIES OF AMERICA, INC.

BUDGET - 1975

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GENERAL INDUSTRIES OF AMERICA, INC.
 Federal Income Tax Return
 1975

	Actual 1975	1974	1973	Facilities Services	Public Relations	Education and Training	Compara- tive Reporting	Service Fees	Insurance Funds	Central Council	Adminis- tration	Inter- national	Project Development	Resources Development
EXPENSES														
Salaries and Wages	519,912	470,510	493,998	119,610	44,570	71,441	69,294	34,757	10,176	45,200	25,200	25,000	20,000	28,750
Employee Health & Retirement Benefits	50,662	64,264	61,290	14,824	5,992	7,993	8,825	4,336	1,369	6,110	3,062	2,926	2,445	3,408
Payroll Taxes, etc.	27,262	23,936	26,668	5,656	2,627	4,824	3,073	2,310	691	2,160	1,080	1,080	2,037	1,080
Total Payroll Expense	597,837	558,710	581,956	140,090	53,239	84,258	81,192	41,403	12,236	53,470	29,342	29,006	24,482	33,238
Professional Fees and Contract Services	58,360	65,650	84,214	662	18,920	14,857	8,587	14,788	200	4,200	5,050	15,050	150	1,750
Supplies	57,305	46,969	53,683	5,575	23,413	3,300	10,205	5,870	310	1,310	1,300	700	850	250
Telephone and Telegraph	26,767	21,880	26,081	8,230	2,600	3,500	1,504	1,064	500	2,510	2,400	1,423	850	1,500
Postage and Shipping	19,823	19,111	23,108	3,750	5,125	2,500	6,074	1,404	600	1,150	800	605	400	700
Occupancy	5,702	5,095	10,900	460	1,615	200	225	200	230	7,320	300	75	-	175
Rental and Maintenance of Equipment	103,062	138,765	53,138	-	-	1,800	25,594	22,534	3,210	-	-	-	-	-
Outside Printing, Publications and Subscrip- tion and Agency Vehicles	56,551	56,881	44,092	930	32,675	5,980	20	317	-	500	400	-	250	-
Conferences, Conventions and Meetings	176,592	123,258	191,074	52,373	9,008	83,443	2,358	2,848	608	7,800	13,300	7,700	4,650	3,880
Specific Assistance to Individuals	13,319	9,388	14,695	130	5,165	-	-	-	-	700	7,800	-	-	900
Membership Dues and Support Payments	-	100	100	-	-	-	100	-	-	-	-	-	-	-
Award and Grants	8,212	2,102	1,665	130	223	50	27	-	-	-	-	-	-	-
Miscellaneous	94,964	123,050	173,074	-	-	173,074	8	-	-	500	175	500	50	-
Total before Depreciation and Contingency	1,225,581	1,174,955	1,258,280	212,332	152,077	372,882	135,867	90,455	17,886	79,460	60,867	55,659	31,482	49,313
Contingency Allowance	-	43,018	51,281	8,591	6,164	15,214	5,574	3,672	721	3,213	2,492	2,295	1,312	2,033
Depreciation of Building and Equipment	-	-	27,282	6,572	2,282	8,094	2,968	1,954	384	1,710	1,326	1,221	698	1,082
Total Direct Expenses	1,225,581	1,217,965	1,336,853	225,496	161,523	396,192	144,407	96,081	18,991	84,383	64,685	59,175	33,492	52,428
Distribution of Indirect Expenses:														
Housing and Occupancy	-	-	25,781	4,117	3,493	4,116	3,243	2,121	582	3,327	998	1,455	787	1,622
Central Services, Print Shop & Mailing	-	-	89,573	15,154	10,948	26,420	9,684	6,420	1,243	5,684	4,315	4,000	2,210	3,473
Personnel	-	-	14,851	3,598	1,340	2,166	2,056	1,046	312	1,358	753	753	686	863
Executive and Accounting	-	-	228,662	38,430	27,794	67,675	24,652	19,435	3,162	14,381	11,118	10,151	5,881	5,881
Total Indirect Expenses	288,312	225,057	298,848	61,201	43,275	100,377	39,636	29,022	5,299	24,870	17,184	16,259	9,378	11,801
Full Cost	1,492,094	1,543,022	1,695,701	286,797	205,098	496,569	184,043	125,103	24,290	109,253	81,869	75,534	42,816	64,329
REVENUES														
Contributions	495,192	338,678	438,943	-	-	305,100	-	-	-	-	-	69,534	-	64,329
Donations from Member Agencies	796,433	964,236	1,060,712	267,739	178,654	190,336	184,043	-	-	109,253	81,869	6,000	42,816	-
Normal Revenue	171,391	199,331	196,026	12,028	28,442	1,132	-	125,103	24,290	-	-	-	-	-
Total Revenue	1,463,016	1,499,245	1,695,701	286,797	205,098	496,569	184,043	125,103	24,290	109,253	81,869	75,534	42,816	64,329
Excess or (Deficit)	(29,078)	(43,777)	-	-	-	-	-	-	-	-	-	-	-	-

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GOODWILL INDUSTRIES OF AMERICA, INC.
Support from the Public and Revenues Supporting Schedule
Budget 1975

	Actual 1973	Budget 1974	Budget 1975
<u>Support from the Public</u>			
<u>Received Directly:</u>			
Contributions - General	30	5,000	5,000
Contributions - Restricted			
Leadership Training Program	183,164	191,925	285,100
International Program	15,500	14,920	69,534
Resource Development Program	33,199	66,000	64,329
Other Contributions	40,288	-	-
Total Contributions - Restricted	272,151	272,845	418,963
Contributions - Unexpended Land, Building and Equipment	22,728	29,142	13,108
Total Received Directly	294,879	306,987	437,071
<u>Received Indirectly:</u>			
Contributions - Methodist Church	16,500	15,000	15,000
Contributions - National Auxiliary to Goodwill Industries	5,000	5,000	5,000
Total Received Indirectly	21,500	20,000	20,000
Total Support from the Public	316,409	326,987	457,071
<u>Federal Grants</u>	201,541	45,833	
<u>Other Revenues</u>			
<u>Membership Dues:</u>			
Agencies - USA	797,351	965,436	1,062,141
Agencies - International	6,282	6,000	6,000
Total Membership Dues	803,633	971,436	1,068,141
<u>Earned Revenue:</u>			
Field Services	8,976	4,000	5,000
Wagner-O'Day	915	15,000	12,000
Accounting Services	115,063	157,000	125,103
Insurance Trust	12,239	16,081	24,290
Public Relations Materials and Services	30,616	25,250	23,500
Seminars	3,582	4,000	5,000
Conference of Executives	4,874	7,000	9,840
Delegate Assembly	17,580	18,000	22,500
Endowment Interest	-	-	1,133
Total Earned Revenue	193,845	246,331	228,366
<u>Incidental Revenue:</u>			
Interest and Dividends	17,284	14,000	16,000
Miscellaneous	16,774	1,000	18,400
Total Incidental Revenue	34,058	15,000	34,400
Total Other Revenues	1,031,536	1,232,767	1,330,907
Total Support from the Public and Other Revenues	1,549,486	1,605,587	1,787,978

GOODWILL INDUSTRIES OF AMERICA, INC.
Summary of All Financial Activities
Budget 1975

Budget 1975

EXPENSES	Budget 1975					
	Actual 1973	Budget 1974	Annual Total	Program Services to Members	Membership Governing Activities	Supporting Services
Salaries and Wages	637,500	714,648	743,880	493,998	-	249,882
Employee Health and Retirement Benefits	67,735	104,061	100,812	61,290	7,200	32,322
Payroll Taxes, etc.	33,367	35,570	42,596	26,668	-	15,928
Total Payroll Expenses	738,602	854,279	887,288	591,956	7,200	298,132
Professional Fees and Contract Services	74,490	77,820	101,263	84,214	225	16,824
Supplies	68,952	51,569	66,453	53,683	1,255	11,515
Telephone and Telegraph	32,332	27,580	34,745	26,081	360	8,304
Postage and Shipping	22,547	21,961	25,325	23,108	265	1,952
Occupancy	75,060	33,490	36,813	10,800	-	26,013
Rent and Maintenance of Equipment	122,939	153,760	75,135	53,138	-	21,997
Outside Printing, Publications and Subscriptions	58,925	57,081	47,150	44,092	1,560	1,498
Travel and Agency Vehicles	192,095	141,801	245,818	191,074	35,500	19,244
Conferences, Conventions and Meetings	66,297	70,802	40,955	14,695	26,260	-
Specific Assistance to Individuals	-	1,600	350	100	-	250
Membership Dues and Support Payments	16,459	8,612	2,610	1,665	-	945
Award and Grants	94,997	123,050	179,674	173,074	6,600	-
Miscellaneous	7,916	5,142	9,500	600	-	8,900
Total before Depreciation and Contingency Allowance	1,571,611	1,628,547	1,753,079	1,258,280	79,225	415,574
Contingency Allowance	-	-	-	51,281	-	(51,281)
Depreciation of Building and Equipment	-	-	34,899	27,292	-	7,607
Total Direct Expenses	1,571,611	1,628,547	1,787,978	1,336,853	79,225	371,900
Distribution of Indirect Expenses:						
Housing and Occupancy	-	-	-	-25,781	-	(25,781)
Central Services, Print Shop and Mailing	-	-	-	89,573	-	(89,573)
Personnel	-	-	-	14,851	-	(14,851)
Executive and Accounting	-	-	-	228,643	13,052	(241,695)
Total Indirect Expenses	-	-	-	358,848	13,052	(371,900)
Full Cost	1,571,611	1,628,547	1,787,978	1,695,701	92,277	-
REVENUES						
Related Revenue						
Contributions - Designated	495,192	338,678	438,963	438,963	-	-
Dues from Member Agencies	803,633	971,436	1,068,141	1,060,712	7,429	-
Earned Revenues from Sale of Supplies and Services	193,845	221,331	228,366	196,026	32,340	-
Total Related Revenue	1,492,670	1,531,445	1,735,470	1,695,701	39,769	-
Excess or (Deficit) of Revenue over Expenditures	(78,941)	(97,102)	(52,508)	-	(52,508)	-
Deduct - Unrelated Revenue:						
Contributions - Undesignated	22,758	34,142	18,108	-	18,108	-
Interest, Dividends and Miscellaneous	34,058	15,000	34,400	-	34,400	-
Total Unrelated Revenue Deductions	56,816	49,142	52,508	-	52,508	-

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GOODWILL INDUSTRIES OF AMERICA, INC.
Summary of Revenue and Expenses
Budget 1975

<u>EXPENSES</u>	Before Indirect Expenses Distribution		After Indirect Expenses Distribution	
	<u>Total</u>	<u>Percent</u>	<u>Total</u>	<u>Percent</u>
Program Services to Member Agencies:				
Field Services	225,496	12.6%	286,797	16.0%
Public Relations	161,523	9.0%	205,098	11.5%
Education and Training	396,192	22.2%	496,569	27.8%
Comparative Reporting	144,407	8.1%	184,043	10.3%
Service Bureau	96,081	5.4%	125,103	7.0%
Insurance Trust	18,991	1.1%	24,290	1.4%
Legal and Legislative Counsel	84,383	4.7%	109,253	6.1%
Rehabilitation	64,685	3.6%	81,869	4.6%
International	59,175	3.3%	75,534	4.2%
Project Development	33,492	1.9%	42,816	2.4%
Resource Development	52,428	2.9%	64,329	3.6%
Total	1,336,853	74.8%	1,695,701	94.9%
Membership National Governing Activities:				
Board of Directors Meetings	18,810	1.0%	22,194	1.2%
Conference of Executives Meeting	9,840	.5%	11,532	.6%
Delegate Assembly	26,735	1.5%	31,569	1.8%
National Auxiliary to Goodwill Industries	8,990	.5%	10,682	.6%
CARF and Other National Organizations	6,600	.4%	7,808	.4%
History of Goodwill	1,050	.1%	1,292	.1%
Trevethan Retirement	7,200	.4%	7,200	.4%
Total	79,225	4.4%	92,277	5.1%
Supporting Services:				
National Executive Department	85,143	4.8%	-	-
Accounting Department	132,201	7.4%	-	-
Personnel Department	16,617	.9%	-	-
Central Services	62,463	3.5%	-	-
Print Shop and Mail Department	33,894	1.9%	-	-
Housing and Occupancy	41,582	2.3%	-	-
Total	371,900	20.8%	-	-
Total Expenses	1,787,978	100.0%	1,787,978	100.0%
<u>REVENUE</u>				
Contributions - Undesignated	18,101	1.0%	18,101	1.0%
Contributions - Designated	438,963	24.6%	438,963	24.6%
Dues from Member Agencies	1,068,141	59.7%	1,068,141	59.7%
Earned Revenue from Sale of Supplies and Services	228,366	12.8%	228,366	12.8%
Interest, Dividends and Miscellaneous	34,400	1.9%	34,400	1.9%
Total Revenue	1,787,978	100.0%	1,787,978	100.0%

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COUNTELL INDUSTRIES OF AMERICA, INC.
Membership National Governing Activities
Budget 1975

	Actual 1973	Budget 1974	Budget 1975	Board of Directors Meetings	Conf of Executive Meetings	Delegate Assembly	NAGI	CARF and Other Natl Orgs	History of Goodwill	Trevelyan Retire- ment
EXPENSES										
Salaries and Wages	-	-	-	-	-	-	-	-	-	-
Employee Health & Retirement Benefits	7,343	7,200	7,200	-	-	-	-	-	-	7,200
Payroll Taxes, etc.	-	-	-	-	-	-	-	-	-	-
Total Payroll Expenses	7,343	7,200	7,200	-	-	-	-	-	-	7,200
Professional Fees & Contract Servs	256	-	225	50	-	75	100	-	-	-
Supplies	1,504	-	1,255	160	225	530	240	-	100	-
Telephone and Telegraph	368	-	360	135	30	140	5	-	50	-
Postage and Shipping	778	-	265	165	40	15	45	-	-	-
Occupancy	134	-	-	-	-	-	-	-	-	-
Rental & Maintenance of Equipment	-	-	-	-	-	-	-	-	-	-
Printing, Publications & Subscriptions	1,454	-	1,560	-	185	75	1,300	-	-	-
Travel and Agency Vehicles	7	-	35,500	18,100	9,200	-	7,300	-	900	-
Conferences, Conventions & Meetings	52,978	61,500	26,260	200	160	25,900	-	-	-	-
Specific Assistance to Individuals	-	-	-	-	-	-	-	-	-	-
Membership Dues & Support Payments	5,000	5,000	-	-	-	-	-	-	-	-
Award and Grants	-	-	6,600	-	-	-	-	6,600	-	-
Miscellaneous	-	-	-	-	-	-	-	-	-	-
Total Before Deprecia. & Contingency	69,822	73,700	79,225	18,810	9,840	26,735	8,990	6,600	1,050	7,200
Contingency Allowance	-	-	-	-	-	-	-	-	-	-
Depreciation of Building & Equipment	-	-	-	-	-	-	-	-	-	-
Total Direct Expenses	69,822	73,700	79,225	18,810	9,840	26,735	8,990	6,600	1,050	7,200
Distribution of Indirect Expenses:										
Housing and Occupancy	-	-	-	-	-	-	-	-	-	-
Central Servs, Print Shop & Mailing	-	-	-	-	-	-	-	-	-	-
Personnel	-	-	-	-	-	-	-	-	-	-
Executive and Accounting	9,695	11,825	13,052	3,384	1,692	4,834	1,692	1,208	242	-
Total Indirect Expenses	9,695	11,825	13,052	3,384	1,692	4,834	1,692	1,208	242	-
Full Cost	79,517	85,525	92,277	22,194	11,532	31,569	10,682	7,808	1,292	7,200
REVENUES										
Contributions	-	-	-	-	-	-	-	-	-	-
Dues from Member Agencies	7,200	7,200	7,429	-	229	-	-	-	-	7,200
Earned Revenue	22,454	25,900	32,340	-	9,840	22,500	-	-	-	-
Total Revenue	29,654	32,200	39,769	-	10,069	22,500	-	-	-	7,200
(Deficit) or Revenue Over Expenditures	(49,863)	(53,325)	(52,508)	(22,194)	(1,463)	(9,069)	(10,682)	(7,808)	(1,292)	-

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GOODWILL INDUSTRIES OF AMERICA, INC.
Supporting Services
Budget 1975

EXPENSES	Actual 1973	Budget 1974	Budget 1975	Administrative Cost			Indirect Cost			Contingencies & Allowance
				National Executive	Accounting	Personnel	Central Services	Mail Room & Print Shop	Housing & Occupancy	
Salaries and Wages	117,588	244,138	249,882	48,600	68,081	9,900	41,712	20,924	12,000	48,665
Employee Health & Retirement Benefits	9,730	32,597	32,322	5,652	8,996	609	6,097	3,218	1,628	6,122
Payroll Taxes, etc.	6,104	11,634	15,928	1,440	4,638	361	3,723	1,967	1,010	2,789
Total Payroll Expenses	133,422	288,369	298,132	55,692	81,715	10,870	51,532	26,109	14,638	57,576
Professional Fees and Contract Servs	15,874	12,170	16,824	117	12,590	2,317	1,800	-	-	-
Supplies	10,143	4,600	11,515	810	5,685	400	620	3,500	500	-
Telephone and Telegraph	5,197	5,700	8,304	5,790	1,602	100	512	300	-	-
Postage and Shipping	1,946	2,850	1,952	800	902	100	50	100	-	-
Occupancy	69,224	28,395	26,013	175	680	75	525	900	23,658	-
Rental & Maintenance of Equipment	19,897	15,000	21,997	-	17,960	-	2,887	850	300	-
Printing, Publications & Subscriptions	920	800	1,498	400	213	800	35	50	-	-
Travel and Agency Vehicles	15,496	18,538	19,244	15,250	3,094	-	750	75	75	-
Conferences, Conventions & Meetings	-	-	-	-	-	-	-	-	-	-
Specific Assistance to Individuals	-	1,500	250	250	-	-	-	-	-	-
Membership Dues & Support Payments	3,247	1,510	945	835	25	50	35	-	-	-
Awards and Grants	33	-	-	-	-	-	-	-	-	-
Miscellaneous	809	460	8,900	-	-	900	-	-	-	8,000
Total Before Depreciation & Contingency	276,208	379,892	415,574	80,119	124,466	15,612	58,746	31,884	39,171	65,576
Contingency Allowance	-	(43,010)	(51,281)	3,279	5,049	656	2,426	1,312	1,573	(65,576)
Depreciation of Building & Equipment	-	-	7,607	1,745	2,686	349	1,291	698	838	-
Total Direct Expenses	276,208	336,882	371,900	85,143	132,201	16,617	62,463	33,894	41,582	-
Distribution of Indirect Expenses:										
Housing and Occupancy	-	-	(25,781)	2,370	3,950	582	3,825	5,074	(41,582)	-
Central Servs, Print Shop & Mailing	-	-	(89,573)	5,633	8,842	1,158	(66,288)	(38,968)	-	-
Personnel	-	-	(14,851)	1,469	2,037	(18,357)	-	-	-	-
Executive and Accounting	-	-	(241,695)	(94,665)	(147,030)	-	-	-	-	-
Total Indirect Expenses	(276,208)	(336,882)	(371,900)	(85,143)	(132,201)	(16,617)	(62,463)	(33,894)	(41,582)	-
Full Cost	-	-	-	-	-	-	-	-	-	-

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ARTHUR ANDERSEN & Co.
WASHINGTON, D. C.

To the Board of Directors of
Goodwill Industries of America, Inc.:

We have examined the balance sheet of GOODWILL INDUSTRIES OF AMERICA, INC. (the national association -- a Massachusetts not-for-profit corporation) as of December 31, 1974, and the related statements of support, revenue and expenses and changes in fund balances and of functional expenses for the year then ended. Our examination was made in accordance with generally accepted auditing standards, and accordingly included such tests of the accounting records and such other auditing procedures as we considered necessary in the circumstances.

In our opinion, the accompanying financial statements present fairly the financial position of Goodwill Industries of America, Inc. as of December 31, 1974, and the results of its operations and changes in fund balances for the year then ended, in conformity with generally accepted accounting principles applied on a basis consistent with that of the preceding year after giving retroactive effect to the changes (with which we concur) in accounting for research and development costs and in recognizing depreciation expense as discussed in Note 3 to the financial statements.

Arthur Andersen & Co.

Washington, D. C.,

March 31, 1975.

GOODEWILL INDUSTRIES OF AMERICA, INC.
BALANCE SHEET
DECEMBER 31, 1974

A S S E T S

LIABILITIES AND FUND BALANCES

Current Funds - Unrestricted

Cash (including \$1,366 in interest-bearing accounts)	\$ 7,591
Marketable securities (at cost, less allowance for market decline of \$17,240)	54,502
Accounts receivable:	
Current -	
Dues	72,761
Supplies and services	21,923
Pledges and other	13,967
Noncurrent - Accounts and notes receivable	108,651
	173,312
Less- Allowance for doubtful accounts	281,963 (79,000)
	202,963
Supplies, at cost	21,191
	\$ 286,247

Accounts payable	\$ 37,878
Accrued expenses	37,060
Deferred revenue	5,273
Due to other funds	129,666
Total liabilities and deferred revenue	209,877
Fund balance - undesignated, available for general activities	76,370

Current Funds - Restricted

Cash in interest-bearing accounts	\$ 200,560
Pledges receivable	32,138
Prepaid expenses	16,175
Due from other funds	173,354
	\$ 422,227

Accrued expenses	\$ 2,281
Deferred revenue	34,296
Total liabilities and deferred revenue	36,577
Fund balances (Note 2)	385,650
	\$ 422,227

Land, Building and Equipment Fund

Marketable securities (at cost, less allowance for market decline of \$10,501)	\$ 23,962
Pledges receivable	95,851
Land	349,906
Building and improvements	277,823
Equipment	167,748
Less- Accumulated depreciation	795,477 (214,074)
	581,403
	\$ 701,216

Note payable (Note 5)	\$ 223,287
Due to other funds	43,688
Total liabilities	266,975
Fund balances (Note 2):	
Expended	358,116
Unexpended - restricted	76,125
Total fund balances	434,241

Endowment Fund

Cash in interest-bearing account	\$ 20,275
	\$ 20,275

Fund balance (Note 2)	\$ 20,275
	\$ 20,275

The accompanying notes are an integral part of this statement.

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STATEMENT OF SUPPORT, REVENUE AND EXPENSES AND CHANGES IN FUND BALANCES
FOR THE YEAR ENDED DECEMBER 31, 1974

	Current Funds		Land, Building and equipment Fund	Endowment Fund	Total
	Unrestricted	Restricted			
PUBLIC SUPPORT AND REVENUE:					
Public support -					
Received directly -					
Contributions	\$ 47,802	\$ 64,127	\$ 4,896	\$ 275	\$ 117,100
Foundation grants	-	225,618	-	-	225,618
Received indirectly, net of contributors' fund raising expenses	47,802	289,745	4,896	275	342,718
Total public support	47,802	302,770	4,896	275	355,743
Fees and grants from governmental agencies	-	80,343	-	-	80,343
Total	47,802	383,113	4,896	275	436,086
Other revenue -					
Membership dues (less provision for uncollectible accounts of \$39,728)	982,969	9,425	-	-	992,394
Program service fees	129,503	-	-	-	129,503
Investment and other income or (expense)	50,643	1,055	(10,501)	-	41,197
Total other revenue (loss)	1,163,115	10,480	(10,501)	-	1,163,094
Total public support and revenue	1,210,917	393,593	(5,605)	275	1,599,180
EXPENSES:					
Program services to member agencies					
Education and training	23,934	227,398	3,003	-	254,335
Finance and management information	207,254	45,839	4,337	-	257,430
Local services	184,903	-	3,003	-	187,906
Public relations	127,348	4,698	2,578	-	134,624
International and other program services	52,917	35,662	1,577	-	90,156
Fund raising	74,004	-	1,183	-	75,187
Rehabilitation	53,403	18,344	728	-	72,475
Special services and general counsel	51,293	-	2,426	-	53,719
Annual meetings	23,309	-	-	-	23,309
Volunteer training	3,675	12,802	-	-	16,477
Total program services to member agencies	802,040	344,743	18,835	-	1,165,618
Supporting services					
Administration	156,154	-	8,614	-	164,768
Finance and management information	111,319	-	2,881	-	114,200
Housing and occupancy	24,820	-	14,106	-	38,926
Total supporting services	292,293	-	25,601	-	317,894
Total expenses	1,094,333	344,743	44,436	-	1,483,512

The accompanying notes are an integral part of this statement.

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ROGERS INDUSTRIES OF AMERICA, INC.

STATEMENT OF REVENUE, EXPENSE AND EXPENDITURE AND CHANGES IN FUND BALANCE
FOR THE YEAR ENDED DECEMBER 31, 1974

	Current Funds		Land, Building and Equipment Fund	Endowment Fund	Total
	Unrestricted	Restricted			
EXCESS (deficiency) of public support and revenue over expenses	\$ 116,584	\$ 48,850	\$ (50,041)	\$ 275	\$ 115,668
OTHER CHANGES IN FUND BALANCES - Property and equipment acquisitions	(9,729)	-	9,729	-	-
FUND BALANCES, beginning of year:					
As previously reported	129,652	215,245	632,478	20,000	997,375
Effect of restatement for accounting changes (Note 1)	(105,640)	-	(157,925)	-	(263,565)
Reclassifications	(54,497)	54,497	-	-	-
Adjustment to reflect committed but unexpended grant funds	-	67,058	-	-	67,058
As adjusted	(30,485)	336,800	474,553	20,000	800,868
FUND BALANCES, end of year	\$ 76,370	\$385,650	\$ 434,241	\$20,275	\$ 916,536

The accompanying notes are an integral part of this statement.

Best Available Document

GOODWILL INDUSTRIES OF AMERICA, INC.

STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED DECEMBER 31, 1974

Program Services To Member Agencies

	Education and Training	Finance and Management Information	Local Services	Public Relations	International and Other Program Services	Fund Raising	Rehabilitation	Special Service and General Counsel	Annual Meetings	Volunteer Training	Total Program Services To Member Agencies
Salaries	\$ 68,936	\$116,185	\$106,653	\$ 44,125	\$24,506	\$43,863	\$30,307	\$33,167	\$ -	\$ -	\$ 467,802
Employee health and retirement benefits	7,384	13,118	12,710	4,872	10,076	4,844	3,297	4,806	-	-	61,107
Payroll taxes	4,360	7,446	5,579	2,331	1,328	2,039	1,382	1,670	-	-	26,135
Total salaries and related expenses	80,680	136,749	124,942	51,328	35,970	50,746	34,986	39,643	-	-	555,044
Professional services and fees	4,634	26,426	4,294	11,444	13,246	6,913	10,858	1,867	251	-	79,937
Supplies	2,649	16,959	2,008	26,467	836	475	433	828	804	76	51,535
Telephone	3,637	3,731	7,878	2,112	1,527	1,415	2,097	1,701	329	87	24,514
Postage and shipping	2,165	8,536	3,243	5,343	695	426	708	1,186	228	2,355	24,835
Occupancy	560	51,308	1,166	1,264	772	77	172	67	-	-	55,386
Outside printing	5,403	3,043	769	22,203	1,453	2,582	3,781	-	183	13,959	53,376
Local transportation	117	791	1,144	223	133	293	70	182	-	-	2,953
Conferences, conventions and meetings	77,670	3,619	39,031	9,937	21,826	10,154	18,469	4,871	20,594	-	206,171
Subscriptions	6,847	12	318	1,293	91	143	15	607	-	-	9,326
Membership dues and support	80	45	110	271	10,830	780	158	341	20	-	12,635
Awards and grants	66,677	1,870	-	-	900	-	-	-	-	-	69,447
Miscellaneous	213	4	-	157	300	-	-	-	900	-	1,574
Total expenses before depreciation	251,332	253,093	184,903	132,046	88,579	74,004	71,747	51,293	23,309	16,477	1,146,783
Depreciation of buildings and equipment	3,003	4,337	3,003	2,578	1,577	1,183	728	2,426	-	-	18,835
Total expenses	\$254,335	\$257,430	\$187,906	\$134,624	\$90,156	\$75,187	\$72,475	\$53,719	\$23,309	\$16,477	\$1,165,618

The accompanying notes are an integral part of this statement.

GOODWILL INDUSTRIES OF AMERICA, INC.STATEMENT OF FUNCTIONAL EXPENSESFOR THE YEAR ENDED DECEMBER 31, 1974

	Supporting Services			Total Supporting Services	Total Functional Expenses
	<u>Administration</u>	<u>Finance And Management Information</u>	<u>Housing And Occupancy</u>		
Salaries	\$ 90,074	\$ 64,595	\$ 3,457	\$158,126	\$ 625,928
Employee health and retirement benefits	8,920	6,635	7	15,562	76,669
Payroll taxes	4,356	3,722	245	8,323	34,458
Total salaries and related expenses	103,350	74,952	3,709	182,011	737,055
Professional service and fees	9,406	8,744	44	17,794	97,731
Supplies	7,219	1,524	252	8,995	60,530
Telephone	7,861	1,269	-	9,130	33,444
Postage and shipping	2,046	599	-	2,645	27,530
Occupancy	4,300	20,237	34,288	58,825	114,211
Outside printing	3,067	166	33	3,266	56,442
Local transportation	755	166	-	921	3,874
Conferences, conventions and meetings	13,077	4,014	154	17,245	223,416
Subscriptions	267	8	-	275	9,601
Membership dues	2,873	40	-	2,913	15,548
Awards and grants	93	-	-	93	69,540
Miscellaneous	1,840	-	446	2,286	3,860
Total expenses before depreciation	156,154	111,319	38,926	306,399	1,453,182
Depreciation of buildings and equipment	8,614	2,881	-	11,495	30,330
Total expenses	\$164,768	\$114,200	\$38,926	\$317,894	\$1,483,512

The accompanying notes are an integral part of this statement.

GOODWILL INDUSTRIES OF AMERICA, INC.

NOTES TO FINANCIAL STATEMENTS

DECEMBER 31, 1974

(1) GOODWILL INDUSTRIES OF AMERICA, INC.

Goodwill Industries of America, Inc. ("Goodwill") is a national association whose purpose is to improve the quality of life for people who are handicapped. Goodwill is supported primarily by member organizations as it receives annual dues from its members based on earned income at the local level. Goodwill renders various services to its members, including personnel placement and recruiting, accounting, and training and rehabilitation.

(2) SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

- (a) Pledges for contributions are recorded when received.
- (b) Membership dues are recorded in the year earned. An allowance for pledges and membership dues estimated to be uncollectible is provided.
- (c) Marketable securities are carried at cost less a provision for decline in market value as determined at year-end. Securities acquired as gifts are recorded at market value when received.
- (d) The accrued liability to employees for vacation earned but not taken as of year-end is provided.
- (e) Depreciation is provided using the straight-line method over the useful life of the related asset. The following useful lives are used in determining depreciation.

	<u>Estimated Useful Life</u>
Buildings and improvements	10-20 years
Furniture and equipment	10 years
Automobiles	4 years

- (f) Restricted funds represent contributions designated by donors for use primarily in the development of new members, training and personnel placement.

(3) RESTATEMENTS OF PRIOR YEAR FUND BALANCES

In order to conform with a recent pronouncement of the Financial Accounting Standards Board, certain costs incurred in the development of an accounting system for sale to others were written off in 1974. These costs were previously deferred

For the year beginning January 1, 1974, Goodwill provided depreciation as recommended by the industry audit guide for voluntary health and welfare organizations published in 1974 by the American Institute of Certified Public Accountants.

Both the accumulated depreciation to December 31, 1973, of \$157,925 and development costs of \$105,640, incurred prior to that date, as discussed above, were recorded in 1974 and are reflected in the accompanying financial statements as retroactive charges to the fund balances at the beginning of the year.

(4) PENSION PLAN

Goodwill participates in a group pension plan with Aetna Life Insurance Company that covers substantially all employees. Based on the most recent actuarial review (February 1974), the plan assets exceeded the actuarially computed value of vested benefits. Goodwill's policy is to amortize unfunded prior service cost over thirty years and to fund currently all pension costs accrued. Pension expense for 1974 was \$45,967, including amortization of prior service costs. Goodwill believes that the Pension Reform Act of 1974 will not have a significant effect on pension costs.

(5) NOTE PAYABLE

The note payable, secured by a first deed of trust on the land and building, is payable in quarterly installments of \$6,536, including annual interest of 6%, through March 31, 1988.

(6) TAX STATUS

Goodwill is a not-for-profit voluntary health and welfare organization, exempt from income tax under Section 501(c)(3) of the U. S. Internal Revenue Code. Goodwill has been classified as an organization that is not a private foundation. For U. S. income tax purposes, individuals may deduct contributions to Goodwill within the limits generally applicable to gifts to publicly supported charitable organizations.

TASKS PROJECTED FOR THE DEVELOPMENT PROGRAM GRANT

1. Employment of project staff at GIA.
2. Orientation of project staff to Goodwill Industries programs.
3. Establish operating procedures and work scheduling.
4. Develop criteria for selecting the target country(s) in Latin America. Conduct library research to gather appropriate evaluative data.
5. Select the target country(s).
6. Develop methodology and data gathering instruments to determine rehabilitation needs of the handicapped.
7. Establish Cooperative Councils in selected country(s)
8. Distribute data gathering instruments.
9. Follow-up on data collection to assure maximum completion rate.
10. Analyze collected data regarding needs of the handicapped, demographic characteristics of target population, economic conditions in the country(s), and related health areas.
11. Produce preliminary reports on target countries - rehabilitation needs, demographic, economic, and related health.
12. Meeting of the Cooperative Council to review project preliminary findings.
13. Develop methodology and data gathering instruments to determine current levels of services to the handicapped.
14. Distribute data gathering instruments.
15. Follow-up on data collection to assure maximum completion rate.
16. Analyze data regarding types of service delivery systems, levels of services provided, numbers of handicapped individuals served.
17. Produce preliminary reports on target countries - delivery systems, levels of service, numbers served.
18. Meeting of Cooperative Council to review project preliminary findings.
19. Develop methodology and data gathering instruments to determine the resources available to support and sustain different program models.
20. Distribute data gathering instruments.
21. Follow-up on data collection to assure maximum completion rate.



22. Analyze data regarding the amount and distribution of financial and manpower resources, determine specific program costs for each program model.
23. Produce preliminary reports on target country(s) - resources availability, costs of each program component.
24. Meeting of Cooperative Council to review project preliminary findings.
25. Analysis of all research findings, library searches, interviews with knowledgeable sources, etc. in preparation for developing vocational rehabilitation program models.
26. Writing of handbooks, manuals and other materials describing each program model and how to implement it.
27. Development of a comprehensive information program to disseminate to governments, community leaders and private citizens interested in establishing vocational rehabilitation programs.
28. Begin preparation of final report with recommendations on implementing the program models in Latin American countries.
29. Final meeting of Cooperative Council to review findings, written materials, program models, information program and final report. The Cooperative Council will also make its written recommendations to the project staff on implementing the program models.
30. Dissemination of developed materials.

SUGGESTED PROGRAM EVALUATION AND REVIEW TECHNIQUE (Modified PERT) NETWORK

The Project plan specifies a three year period in which to accomplish the events and activities required for completion. In the PERT network presented here, events are indicated by circles (O) and arrows (→). Events are numbered and are identified by corresponding numbers in the listing attached. The vertical lines indicate the limits of the months of the Project calendar.

