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**CATHOLIC RELIEF SERVICES  
SMALL ENTERPRISE DEVELOPMENT  
MATCHING GRANT PROGRAM**

**ANNUAL REPORT - GRANT YEAR I**

**In fulfillment of AID/FVA/PVC Grant  
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## **SUMMARY**

On 30 August 1988, AID signed into effect the CRS Small Enterprise Development (SED) Matching Grant Program. The Grant is centrally funded through the AID/FVA/PVC Office and is valued at \$5 million. The purpose of the Program is to **build CRS' institutional capacity in small enterprise programming** through the establishment of an SED Technical Unit at CRS headquarters and the implementation of SED pilot programs in Latin America, Africa and Asia. The Program consists of three phases which are to be implemented over five years.

Phase I comprises a **start-up period** during which time CRS is to establish program management systems for the grant. During this period, CRS is also to develop detailed design and implementation plans for the five pilot programs. Pilot programs are to be implemented in Thailand, Togo, Bolivia, Peru, and Senegal. All plans are due in Grant Year I except that of Senegal which is due in Grant Year II. In **Phase II**, CRS will begin **full-scale implementation** of the pilot programs and a series of institutional strengthening activities in SED programming. In **Phase III**, CRS will draw on **lessons learned** to realign its strategy for expanding SED programming within the Agency.

In the **ten months** of implementation thus far, CRS has established SED program management systems at headquarters and **prepared for pilot program implementation**. In Thailand, Togo, and Bolivia, CRS field offices have hired program management staff, collected base-line data, conducted needs assessments, organized training workshops, implemented small test projects and developed their detailed design and implementation plans. CRS/Peru is several months behind schedule and will not be completing its plan until the first quarter of Grant Year II. CRS/Senegal is ahead of schedule and has begun an early preparation of their plan.

The **major challenge** in program implementation thus far has been in meeting the **expanding demand for SED technical services** from CRS field offices. The SED Technical Unit will seek to increase CRS' capacity to meet the demand through SED information dissemination, field workshops aimed at developing a sub-regional technical capacity in SED, and contracting local and international SED technical services.

The budget expenditures as of 30 June 1989 were \$175,506. CRS expects to spend an additional \$123,564 before the close of Grant Year I on 31 August 1989.

## INTRODUCTION

The following report provides an overview of progress made to date in the implementation of CRS' SED Matching Grant Program. The document which covers the reporting period of 1 September 1988 - 31 July 1989 and comprises the first eleven months of Grant Year I first describes the institutional context in which CRS is implementing the Grant. Secondly, it discusses the institutional strengthening methodology of the Matching Grant and how it has evolved since it was developed in the original grant proposal. The report then provides an overview of progress made in implementation at the level of headquarters and the individual country programs. This is followed with a presentation on the grant monitoring system and an analysis of the grant financial status. The report concludes with a discussion of Grant Year II activities, lessons learned and recommendations.

### I. Background to Grant and Program Context

The SED Matching Grant is one of several initiatives which CRS has recently undertaken to strengthen its capacity to provide quality development assistance. In the last five years, CRS has instituted a strategic planning process for its field offices to sharpen the focus and increase the impact of their programs. The Agency has sought to improve program efficiency by decentralizing decision-making and strengthening local counterparts. CRS is now in the process of relocating its world headquarters to Baltimore in order to reduce the costs of its programming operations. The SED Matching Grant is thus part of a broader effort to move the Agency towards a greater capacity to reach the poor with efficient, effective and affordable development assistance.

Indeed, the Matching Grant comes at a point when CRS is addressing major institutional challenges. The roots of the institution are found in a global infrastructure recognized for its expertise in the delivery of relief and food aid. During the 46 years since its inception, the rapid growth of this infrastructure has resulted in the creation of one of the largest and most experienced institutions in the international PVO community. Although CRS maintains a strong commitment to relief, over the last decade CRS has increasingly integrated development in its programming activities. CRS has thus confronted the challenge of

introducing development programming skills and systems into an infrastructure whose principal orientation had been the administration of relief and food aid.

To foster the self-reliance of poor communities, the majority of CRS field offices have established projects departments which sponsor development activities. These activities are implemented independently from or integrated with food programming activities. In countries where it was no longer appropriate, CRS has phased out of food aid and focuses on development activities which exclusively use cash inputs. Other country programs have developed a variety of strategies to use food aid as a resource for development. Still others continue to use food aid as a resource in welfare and relief programs.

The program management at CRS headquarters are organized along regional lines - Eurasia, Africa and Latin America. Each of these regional offices has an established system for the review, approval, and monitoring of development projects in the support of the field. Besides providing administrative support to the field, the regional offices have also offered some programmatic support for the wide range of projects in their portfolio by analyzing project designs, hiring technical consultants, disseminating information and funding field workshops. However, the diversity and scope of field operations tend to restrict support to the field to largely administration.

Through the SED Matching Grant, CRS is implementing a program designed to work across all three regions and offer specialized support to field offices in small enterprise development. The Grant offers CRS the possibility of establishing an organizational unit which will assist the regional and field offices to consolidate lessons learned and refine them into improved methodologies and systems. Moreover, CRS field offices now have an organizational channel through which they can access proven methodologies and SED performance standards developed within CRS and the PVO community at large. During the grant period, CRS will conduct an agency-wide training program in SED programming skills and methods for both field staff and management. Finally, CRS field offices will work together with headquarters to develop guidelines and performance standards for the design, feasibility, planning and operations research of projects promoting small-scale commercial activity.

The Matching Grant thus offers CRS a strategic opportunity to strengthen its general programming capability. The success of the Grant, however, will be measured by the degree to which it can improve program quality in SED while capitalizing on the Agency's long-standing institutional linkages, professional experience, and diverse resource base. It will be this approach of introducing programming innovation to CRS while drawing on its institutional uniqueness that will serve as the basis of the SED Matching Grant strategy.

## II. Program Methodology

### II.A. Evolution in Program Methodology

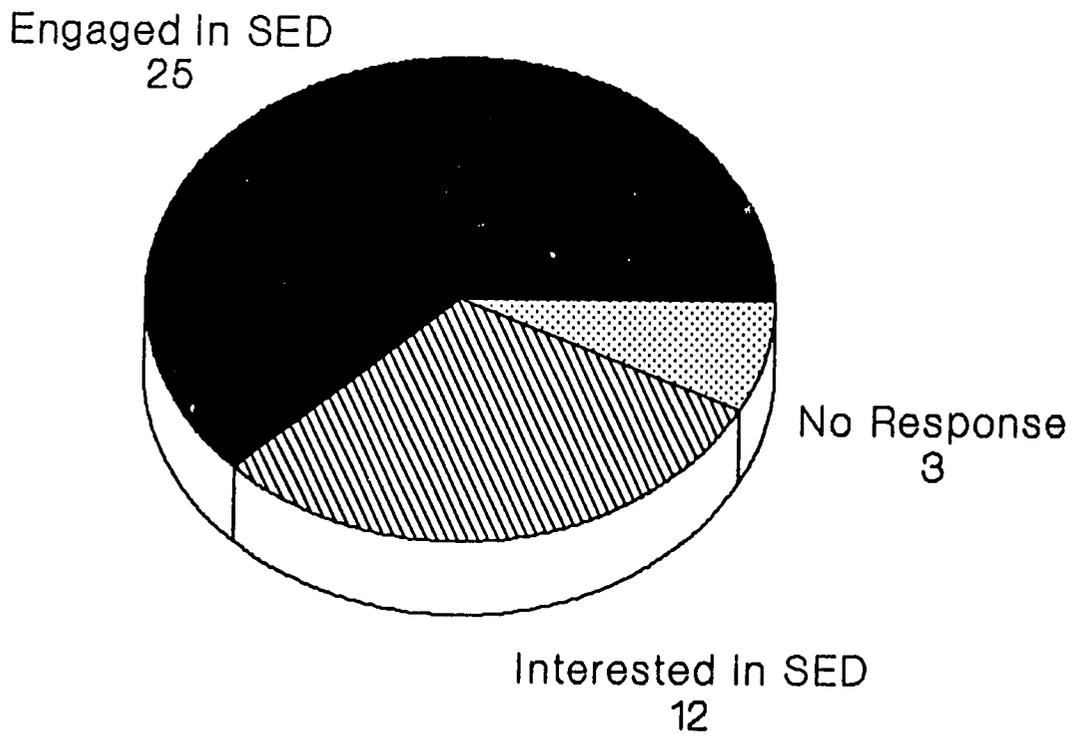
Upon awarding the SED grant, the AID/Matching Grant Review Committee recommended that CRS provide for a pre-implementation phase to establish program management systems and prepare detailed design and implementation plans for the pilot programs. Thus, Phase I of the Matching Grant comprises the pre-implementation period.

Over the course of the ten months of program implementation, CRS has found that allowing for a pre-implementation phase has provided a useful opportunity to sharpen the focus and approach of its SED Program methodology. During this period, CRS field offices have been able to develop substantive design and implementation strategies for the pilot programs. CRS has also been able to use the opportunity to solicit the participation of the field offices and management in the formulation of an institutionalization plan for SED within the Agency.

#### II.A.1. Pilot System

The principal strategy for matching grant implementation is to develop a system of pilot programs which are successful and innovative in CRS SED programming. This pilot system consists of five coordinated field laboratory programs for testing, refining and consolidating SED methodologies that reflect CRS programming values. The approach with the pilots has been one of providing them with resources, time and technical assistance to identify SED intervention strategies that are appropriate to the local context; that increase the technical capacity of CRS staff to strengthen local institutions; and that are ground breaking in CRS SED methods. The pilots have thus used the pre-implementation period to expand upon proven methodologies developed both locally and internationally and formulate program designs that not only address the needs of targeted enterprises and institutions but contribute towards increasing CRS' technical capacity in small enterprise programming methodologies.

## ***Current Activity/Interest of CRS Field Offices in SED***



**Figure 1**

## **II.A.2. SED Technical Support Services**

### **Expanding the Mandate of OPRM**

A second component of the SED Program methodology entails establishing an SED Technical Unit at CRS headquarters within CRS' Office of Project Resources Management (OPRM). Since the departmental mandate of OPRM to date has been largely one of administering public and private resource flows, the expansion of the department's operations to include programmatic support services represents a significant departure from its past.

Thus far OPRM has made considerable progress in establishing a Technical Unit that is service oriented and sensitive to the individual needs of the regional and field offices while facilitating innovation in CRS programming. In addition to managing the pilot system, the SED Technical Unit will thus also seek to promote the transfer of SED skills, methods and learning within the Agency through information dissemination, training, and technical consultancy.

### **CRS Demand for SED Services**

In an effort to tailor SED services to the needs and demand of CRS field offices, OPRM conducted an agency-wide survey of CRS' forty field offices to determine their interest and service priorities in SED to which it received 37 responses.

The baseline survey revealed that a widespread interest and activity in SED programming currently exists among CRS field offices. Sixty-seven percent of those offices that responded indicated that they had developed an SED related component in their strategic program plan. Of the remaining twelve offices which did not have an SED component in their strategic plans, all expressed an interest in developing one. In sum, 92% of the 37 responding field offices indicated that they either want to initiate or expand the role of SED in their programming. The chart displayed in Figure 1 provides an indication of the high level of present and future interest in small enterprise development.

This growing interest in SED can be attributed in part to several factors. Prior to the Matching Grant many CRS field offices had begun initiatives in SED upon which they have since expanded. Many CRS field offices are also responding to the demand from local counterparts who are increasingly interested in SED interventions as a viable method for poverty alleviation. Finally, the Matching Grant has

encouraged CRS field offices to draw on SED as a development strategy.

This movement among CRS field offices towards SED has major implications for the operations of the SED Technical Unit. Not having anticipated the rapid growth of interest in SED, the Matching Grant design only planned for two SED technical advisors and a program assistant. Hence, the Unit does not have the staff to keep up with the demand from so many field offices for support services. In surveying the needs for SED support services, 92% of field offices have requested SED workshops, 89% requested resource mailings and 73% of the offices have requested technical advisors.

The Region which has made the most dramatic shift towards SED is Eurasia. Requests from this Region for technical support services are sufficient alone to more than absorb the entire capacity of the Technical Unit. The Latin America region has been historically the most active in SED. Offices there have experience and lessons learned that the Technical Unit could tap more fully. Finally, the Africa Region is the area where CRS SED programming could possibly have the most catalytic impact in introducing SED technologies to local institutions that are only now embarking on schemes for micro-enterprise development, community income generation and organizational self-reliance. The Unit currently lacks the capacity, however, to respond fully to the potential that Africa offers for advancing CRS SED programming in the region.

In light of the demand, the SED Technical Unit has been faced with the challenge of defining strict interim limits to its service capacity which are manageable while developing a strategy for increasing its outreach to the field over time. The focus of the Unit thus far has been on assisting the field in making the pilot system operate effectively. During Grant Year II, the Unit will begin to develop its training package to be used in the grant sub-regional workshop series which includes all CRS field offices. Implementation of the workshops has been rescheduled for Grant Years III and IV in order to provide more time to establish and draw on lessons learned from the pilot system. In the interim, the SED Unit will assist regional offices in coordinating SED workshops using unrestricted funds for countries where there is an acute demand for SED technical training.

The strategy of the Unit is to work with the regional offices in facilitating the transfer of SED skills, methods

and systems to the sub-regional level of CRS operations and hence develop the sub-region's internal capacity to provide SED support services to its field offices. CRS has recently embarked on a decentralization process of authority to its sub-regional field offices of which there are ten. Sub-regions should increasingly serve as the organizational nexus for exchange and transfer of innovation in CRS programming. Program officers from several country programs meet occasionally for training at the sub-regional level. Sub-regional SED workshops will be designed to be a part of this sub-regional learning process. In addition, the Technical Unit will cooperate with any CRS sub-regional office interested in developing a program officer who could serve as an SED technical resource to field offices within the sub-region.

Finally, the Technical Unit will rely on both local and international contractors to respond to the service demands beyond the pilot programs. These services will be contracted on request using the unrestricted funds of the regional or field office. The Technical Unit will work with the regions in identifying technical advisors and in coordinating the provision of the assistance. Drawing on outside contractors will provide the Agency with a flexible technical resource pool, allow it to access specialized SED expertise, and expose the Agency to state-of-the art SED methodologies.

### III. Headquarters Management

#### III.A. Planning, management, training and technical assistance activities

The effective date of the SED Matching Grant is 31 August 1988. Since the AID/Contract's Office was nearly a month late in processing the agreement, CRS did not begin implementation until 30 September 1988 when CRS signed and returned the grant agreement.

During the first month of program start-up in October of 1988, the focus of headquarters management was on establishing the SED Technical Unit and formulating the systems to manage the pilot programs. The Unit and regional offices issued administrative and program guidelines to the pilots and established a central mechanism for coordinating among the three regional offices the accounting and disbursement of funds within the pilot system.

In October, the SED Technical Unit also prepared the first draft of the CRS SED Strategic Program Plan which will constitute its program design for the Matching Grant. The Unit drafted an early version in order to formulate the broad strategic parameters of the program and thus provide a more updated framework for grant operations from that outlined in the SED Matching Grant proposal. A copy of the draft SED strategic plan has been submitted to the PVC Office. The plan will be finalized with the input of the field and regional offices and be submitted to the AID/FFV/PVC Office in October of 1989.

In November and December, the Unit provided direct technical assistance to Togo and Thailand respectively in initiating their needs assessments and trial interventions. In November, the Unit also used unrestricted funds to conduct an introductory SED workshop for program directors and project officers of the Lome Cluster (a sub-regional office of West Africa).

In January of 1989, the Unit launched its agency-wide survey of CRS field offices to measure existing SED involvement and assess the nature of demand for technical services. In the same month, the Unit used unrestricted funds to conduct a workshop for project officers from the five zonal offices of CRS/India to determine strategies for assisting local counterparts in building their capacity to integrate SED into their MCH/Food Aid programs.

In February and March, the Unit provided technical assistance to Bolivia, Peru, Togo and Senegal in developing their program designs. In May, the Unit provided technical assistance to Thailand in finalizing their design and contracted technical assistance for a SED feasibility workshop in the Lome Cluster.

In June and July, the Unit has continued to work with the pilot programs in finalizing their detailed implementation plans and has assisted the Eurasia region in contracting technical assistance to stage an intensive SED programming workshop for CRS/Egypt. In June, the Bureau for Science and Technology and the PVC Office also provided a fellowship to the SED Coordinator in order to participate at Harvard University in an intensive training for applying the case study pedagogical method in SED training.

On an on-going basis, the Unit provides assistance to the regional offices in the review of SED projects and to headquarters policy makers on SED related issues.

### **III.B. Staff Resources**

At the time of program start-up, the staff of the Technical Unit consisted of the SED Coordinator and a part-time assistant. CRS' Human Resources Department had difficulty in recruiting a person with the appropriate combination of skills and a full-time SED program assistant was thus not hired until February 1989. The Manager of Public Grants of the Office of Project Resources Management has been appointed Grant Officer for the Matching Grant and is able to offer substantial experience in grants management. The SED Technical Advisor of the Latin America regional office has also been able to offer support in the coordination of pilot activities in Bolivia and Peru. This position will be discontinued upon relocation to Baltimore. The Grant does budget for a third position, that of a SED Program Officer. This position will be filled after headquarters relocates to Baltimore.

Thus far the Unit has drawn on the services of two contractors: Lassen Associates and FINCA (Foundation for International Community Assistance). Having provided extensive assistance to both local SED institutions and U.S. PVOs implementing institutional strengthening grants, Lassen Associates has brought to CRS a wide range of skills in methods for building institutional capacity in small enterprise programming. FINCA has provided CRS with

assistance in developing methods for promoting community-based lending systems, women's enterprise, and participatory development approaches. The Unit is also seeking to identify local contractors who can provide on-going technical assistance to field offices and has made some progress in accomplishing this in India. Since SED is a new field, identifying appropriate local contractors is not always possible in many countries.

In the ten months of implementation, the SED Coordinator has provided 126 days of on-site technical assistance to programs in the pilot system to date. The SED Project Officer Latin America has provided 12 days. The Technical Unit has contracted an additional 67 days for field services.

#### **IV. Review of Country Progress to Date**

The primary focus of matching grant activities in the ten months of operations thus far has been on developing the detailed implementation plans (DIPs) for the pilot programs in Thailand, Togo, Bolivia, and Peru. In order to develop their DIPs, CRS field offices in these countries have hired program management staff, negotiated working relationships with local counterparts, collected base-line data, organized training workshops, and implemented small test projects. The DIPs for Thailand, Togo and Bolivia will be submitted to the AID/FFV/PVC Office in August of 1989. The DIP for the Peru program has been delayed and will not be submitted until later this fall. The Senegal program is not scheduled to begin preparation of the DIP until Grant Year II. They are, however, ahead of schedule and already began preparation of their DIP earlier this year.

The SED Technical Unit has worked closely with the pilot programs in formulating their design and implementation strategies. The Unit has allowed for diversity within the pilot system. At the same time, it has encouraged an integration of themes among the pilot programs in order to move towards defining a CRS approach to SED which reflects CRS programming values. Pilot intervention strategies have thus ranged widely including: community banking for women's village enterprise; integrated financial, production and management assistance to rural artisans; and urban micro-enterprise assistance packages.

There are also several common themes running through all of the pilot programs. They all seek not only to increase the income of the poor but to empower them to capture surplus (savings), make rational investment decisions and start their families on a cycle of economic growth. The programs recognize that Third World women are usually the managers of the household finances of poor families and thus can be among the most dynamic element of a developing economy being the ones who are ultimately responsible for bringing food to the family table. The programs thus encourage the involvement of women particularly in savings and credit schemes because their family role in the developing world seems to make mothers particularly responsible borrowers.

The programs emphasize the participation of communities in the management of delivery systems in order to reduce costs, establish community-based mechanisms for sustainability and empower them to formulate collective local solutions to

problems. The communities may be village associations, trade guilds, cooperatives, women's groups or any other mutual support group for entrepreneurs that can provide a means to access resources to increase productivity whether it be raw materials, collective sales orders, a money club, exchange of production techniques or favorable policies from the local government official.

The programs also work with local development counterparts which share participatory values and allow communities space for their own initiative. The programs develop the technical capacity of CRS field offices to strengthen the methodologies of counterpart institutions in SED interventions, cost-recovery systems and institutional sustainability.

These themes do not constitute a CRS SED model. They are, however, foundations for developing an approach to small enterprise programming that taps CRS' core development values and translates them into programming methods and systems. CRS field offices will continue to develop and refine these themes over the course of matching grant implementation.

What follows are concise overviews of the progress of each of the pilot programs.

#### **IV.A. Thailand**

The purpose of the CRS/Thailand Pilot Program is to work with local NGOs to develop a community banking program appropriate to rural Thailand. CRS/Thailand and the SED Technical Unit conducted workshops to train several local NGOs in community-based lending systems. In December 1988, CRS/Thailand assisted RFA, a local NGO, in inaugurating two test community banks in Surin Province. Membership of the two banks totaled 73 village mothers. A four month loan cycle and an interest rate of 12% was set for the test banks. In January 1989, SED program staff were hired and a CRS SED community banking support center was established in Surin city. The support center collected base-line data and conducted institutional analyses of participating NGOs.

In May, RFA collected the loans and CRS sponsored a two day participatory evaluation with community bank members. The repayment rate of the test banks to RFA was 100%. There was one default which the village women covered from member savings. The annual capitalization rate was over 60%. (The capitalization rate is the rate at which a unit of

credit generates a unit of savings; savings constitutes the villagers own capital base for sustaining the bank). Micro-enterprise activities financed included vegetable gardening, animal husbandry, weaving, sericulture and petty trading. Village women were enthusiastic about the program and interested in expanding it within their villages. Neighboring villages also expressed interest in participating in the program. CRS/Thailand has drawn on data from the tests to formulate their detailed implementation plan. Full-scale implementation is scheduled for August 1989.

#### **IV.B. Togo**

The purpose of the CRS/Togo Pilot Program is to assist rural artisans with training in management, production technologies, credit, savings, and strengthening of their micro-enterprise associations. CRS/Togo will first work with GIPATO, an association of artisans in the rural town of Sokode, and then explore the possibility of expanding beyond GIPATO/Sokode.

GIPATO is unique in the African context: the nascent institution is managed democratically by member artisans and has achieved a fledgling capacity to self-finance its operations. CRS/Togo will provide assistance to GIPATO in extending the scope and improving the quality of its services to its member artisans. It will assist GIPATO in developing its capacity to recruit more members, strengthen its cost-recovery systems, improve internal participation and offer more opportunities to women artisans.

CRS/Togo hired its SED program manager in December 1988. CRS/Togo thus far has concentrated on a comprehensive institutional analysis of GIPATO; an assessment of training needs of GIPATO artisans in management, marketing, and production technologies; and the development of a methodology for enhancing GIPATO's systems in savings mobilization and credit for working capital loans. CRS/Togo has collected base-line socioeconomic data of GIPATO's membership and conducted experimental workshops with the artisans in production technologies. CRS/Togo is preparing for full-scale implementation in August of 1989.

#### **IV.C. Bolivia**

The purpose of the CRS/Bolivia Pilot Program is to work with established local SED NGOs in enhancing their methodologies in community-based micro-enterprise development interventions and in extending these methodologies to local NGOs which have not yet developed a micro-enterprise capacity. Under the aegis of the Matching Grant, CRS/Bolivia will sponsor the formation of a Micro-enterprise Development Group comprised of CRS and three partner institutions: PRODEM, which provides working capital credit to micro-entrepreneurs applying a methodology developed by AITEC International; FIE which extends credit and management training to micro-entrepreneurs in La Paz; and, CEDLA which is renowned for its work in research and publications related to the informal sector.

The Micro-enterprise Development Group will implement small projects to test methods for increasing community management of delivery systems in credit and training in order to reduce costs and facilitate the reinforcement of mutual support structures which can empower groups of entrepreneurs to formulate collective solutions to their problems. The partner institutions have singled out trade (guild) and women's associations as the community-based groups on which they will focus in urban areas. The partners are also interested in testing ways to augment the impact of credit with integrated training packages and in introducing savings mobilization as a force which can promote group cohesion by providing a shared source of working capital.

CRS/Bolivia will draw on matching grant resources to finance small projects to test and document new methodologies and sponsor symposia to promote information and learning exchange. Partner institutions will enter into a "twinning" relationship with new SED NGOs to transfer micro-enterprise skills and methods.

CRS/Bolivia hired the SED Coordinator for South America Region in March 1989. The Coordinator is based in La Paz and serves as the manager for both the Bolivia and Peru pilot programs. Thus far, CRS/Bolivia has concentrated on negotiating with partner institutions, formulating the mandate of the Micro-enterprise Development Group and developing a research agenda for Grant Year II. CRS/Bolivia intends to begin full-scale implementation in August of 1989.

#### IV.D. Peru

The purpose of the CRS/Peru SED Pilot Program will be to assist local SED NGOs in increasing the impact of their credit delivery systems to micro-enterprises through management assistance and the strengthening of trade associations. CRS/Peru has not completed the formulation of its program design and strategy and will thus be delayed in submitting its detailed implementation plan until the first quarter of Grant Year II. The SED Coordinator/South America will first focus on making the CRS/Bolivia pilot program operational before turning his full attention to the CRS/Peru pilot program. Moreover, the severe economic crisis which Peru is currently experiencing has made the formulation of a feasible intervention strategy particularly challenging. Since CRS often works in countries with hyperinflation and acute political instability, this is a challenge that the Agency welcomes. It will provide CRS an opportunity to develop SED methodologies appropriate under such tenuous economic conditions and will thus prove very useful to the wider learning purpose of the matching grant.

#### IV.E. Senegal

CRS/Senegal was not scheduled to begin its needs assessment process for the Matching Grant until Grant Year II. CRS/Senegal has been eager to begin operations and thus started the needs assessment earlier this year. They hired a program manager in May and have begun a detailed survey to determine the local institutional capacity in SED. Based on their preliminary analysis, CRS/Senegal envisions departing significantly from the SED strategy outlined in the grant proposal for Senegal. The original program concept focused on management extension services to small scale manufacturers operating in the light industrial sector of Dakar. CRS/Senegal now envisions focusing more on micro-enterprises operating in the rural sector and providing both management and credit assistance. The new program concept is only in the preliminary stage and will be further developed over the next six months. CRS/Senegal has been keeping the local AID mission informed about the evolution of the program concept and has received their support. CRS/Senegal anticipates finalizing its detailed implementation plan in the first quarter of 1990.

## V. Monitoring and Evaluation

In establishing monitoring and evaluation systems for the Matching Grant, the SED Technical Unit has concentrated thus far on the following:

- (1) conducting baseline surveys of the pilot programs and CRS small enterprise activities agency-wide;
- (2) assisting the pilot program in designing logical frameworks for the pilot programs and the Technical Unit which specify measurable targets and other performance indicators which can be monitored;
- (3) developing computerized cost models for NGO enterprise assistance delivery systems to project and monitor progress towards institutional capacity for self-financing;
- (4) assisting the pilot programs to establish management information systems to evaluate progress towards major program milestones and impact of program activities on beneficiaries.

The SED Technical Unit has not imposed a standard monitoring and evaluation system because of the diversity in pilot program activities. Each pilot program is engaged with a variety of local institutions, community groups, sectors, enterprises and intervention packages. The Technical Unit has issued complete guidelines, however, for programmatic and financial reporting. CRS internal reporting for the grant consists of monthly program status memoranda and semi-annual progress reports. AID progress reports are submitted on an annual basis, and additional relevant documentation is provided to the PVC Office and local missions throughout the grant year. Internal evaluations of pilot programs will be conducted by the Technical Unit in years II and IV. AID external evaluations will be conducted in years III and V. In October 1989, the Technical Unit will submit to the PVC Office its comprehensive grant monitoring targets and system.

## **VI. Grant Year II Activities**

A detailed calendar of activities for Grant Year II will be submitted to the PVC Office as a component of the SED Strategic Program Plan. The focus of Grant Year II will be on beginning the full-scale implementation of the pilot programs and on developing a system for reaching beyond the pilot programs through "outreach" services. As opposed to on-site technical assistance, outreach services will provide a means to reach a large number of field offices through information dissemination, coordinating SED contractors and training workshops. In Grant Year II, the Unit will begin an information dissemination campaign and it will also develop the training packages for the grant workshops which have been rescheduled for Grant Years III and IV. Finally, the Unit has begun planning with CRS' External Affairs Department a social marketing strategy for SED which it will formulate in Grant Year II.

## **VII. Financial**

As had been agreed with the AID/FFV/PVC Office, the following financial report only covers the first three quarters of Grant Year I (1 September 1988 - 31 May 1989). This fiscal period was selected because the PVC Office requires that the report be submitted 30 days prior to the closing day of the grant year and CRS needs one month in the field and one month at headquarters to compile the financial data.

### **VII.A. Analysis of Budget Expenditures and Projections**

The total amount budgeted for Grant Year I of the SED Matching Grant was \$792,382. Actual expenditures for the first three quarters of Grant Year I totaled \$175,506. A breakdown of the expenditures is shown in Table 1 in Appendix A. As the table indicates, \$81,633 was spent of AID's \$424,998 funding commitment for Grant Year I and \$93,872 was spent of CRS' \$434,735 commitment. CRS projects that budget expenditures for the last quarter of Grant Year I will total \$123,563. CRS thus estimates that there will be a remaining balance of \$289,182 of AID's commitment for Grant Year I.

The low rate of expenditures seen occurred while the SED pilot programs took time to develop their design and implementation plans. Thailand and Togo spent respectively \$48,303.59 and \$44,796.25 and both conducted test projects, collected baseline data, held workshops and established SED

field offices. Bolivia's expenditures totaled \$8,387.61 and that of Peru totaled \$2,663; both of these countries anticipate making large commitments to counterpart institutions for project funding in Grant Year II. Senegal asked to begin their start-up period in Grant Year I and was advanced funding. They were originally slated to begin in Grant Year II.

The SED Technical Unit has also been operating under budget during the first nine months of the year. Low total expenditures which for this period equaled \$56,713 can be attributed to several factors. The actual salary expenses of SED Technical Unit staff are less than that which was budgeted. Moreover, the third staff member budgeted for the Technical Unit has not yet been hired and will not be hired until Grant Year II when CRS headquarters relocates to Baltimore. Finally, the Latin America Region has deferred implementation of its SED sub-regional workshops until Grant Year III. These workshops were covered in the budget of the Technical Unit.

In the original Matching Grant proposal, the total amount budgeted for expenditures in Grant Year II was \$1,146,895 of which \$424,999 was AID monies and \$721,896 was CRS monies. CRS currently projects expenditures for Grant Year II is \$1,196,690 of which \$598,169 will be AID monies and \$598,521 will be CRS monies. In the grant agreement, AID/FFV/PVC provided a straight-line commitment of \$425,000 annually with the provision of CRS' rolling over unexpended AID monies from one year to the next. Since full scale implementation begins in Grant Year II, budget expenditures can be expected to be low in Grant Year I and progressively increase during Grant Years II and III.

#### **VII.B. Letter of Credit Operations**

CRS drawn downs on the matching grant are done on a monthly basis. Total draw downs for Year I amounted to \$85,927 versus the \$81,634 AID monies expended. The remaining balance represents the difference between actual and projected expenditures.

**VII.C.** No fund-raising plans or activities were began in Year I or projected for Year II.

**VII.D.** CRS remains strongly committed to the SED Matching Grant. The Agency has not had nor does not foresee any actual or anticipated problems in meeting the agreed cost-share on an annual or aggregate basis.

### VIII. Summary of Lessons Learned and Long-term Program Implications

As the pilot programs undertake full-scale implementation, many lessons can be anticipated in the costs, benefits and technical requirements of various forms of SED interventions.

The primary lessons of Year I have been on the level of institutional development and CRS policies. It is clear that CRS is in a dynamic phase of change. The response to SED within the Agency has been positive. Field programs throughout CRS are interested in initiating and/or expanding SED program activities. The current resources that the Matching Grant provides the SED Technical Unit are not adequate to cover this demand. The strategy therefore is to (1) develop standard setting pilot programs which share methodologies and lessons learned with other CRS programs; (2) offer SED workshops at the sub-regional level and establish an agency-wide information dissemination system; (3) assist regional and field offices in assessing technical assistance needs and contracting outside SED technical services.

#### Recommendations

1. The SED Technical Unit/OPRM should collaborate with the regional and sub-regional offices to determine a strategy for building an SED technical capacity at the sub-regional level in order to respond to the demand of field offices for SED services.
2. The SED Technical Unit/OPRM should work with the regional and sub-regional offices in developing a pool of local and international contractors whom field offices can call upon for SED technical services.
3. Any outside technical assistance provided to field offices should be conducted in a way that strengthens the independent technical capacity of the field office.

## APPENDIX A

SED MATCHING GRANT  
FINANCIAL PROFILE OF THE PROJECT

A. BUDGETED VERSUS ACTUAL EXPENDITURES

YEAR I  
1 SEPTEMBER 1988 - 31 AUGUST 1989

PROJECT ELEMENTS -----	A.I.D.		CRS		Total Budget	Total Expenditure (thru 5/31)
	Budget	Expenditure (thru 5/31)	Budget	Expenditure (thru 5/31)		
<b>BOLIVIA COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$53,217	\$691	\$48,683	\$691	\$101,900	\$1,381
EVALUATION	\$0	\$0	\$0	\$0	\$0	\$0
PROGRAM MANAGEMENT	\$20,150	\$3,624	\$24,750	\$3,382	\$44,900	\$7,006
<b>PERU COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$86,324	\$1,245	\$86,476	\$1,418	\$172,800	\$2,663
EVALUATION	\$0	\$0	\$0	\$0	\$0	\$0
PROGRAM MANAGEMENT	\$14,250	\$0	\$14,250	\$0	\$28,500	\$0
<b>SENEGAL COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$0	\$0	\$0	\$509	\$0	\$509
EVALUATION	\$0	\$0	\$0	\$0	\$0	\$0
PROGRAM MANAGEMENT	\$0	\$0	\$0	\$385	\$0	\$385
<b>TOGO COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$33,102	\$9,273	\$19,440	\$0	\$52,542	\$9,273
EVALUATION	\$0	\$0	\$0	\$0	\$0	\$0
PROGRAM MANAGEMENT	\$26,998	\$10,190	\$41,372	\$25,333	\$68,370	\$35,524
<b>THAILAND COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$60,113	\$10,613	\$68,157	\$14,675	\$128,270	\$25,288
EVALUATION	\$1,800	\$0	\$1,800	\$0	\$3,600	\$0
PROGRAM MANAGEMENT	\$15,150	\$10,781	\$15,150	\$12,234	\$30,300	\$23,016
HEADQUARTERS	\$80,600	\$28,822	\$80,600	\$27,891	\$161,200	\$56,713
<b>TOTAL DIRECT COSTS</b>	<b>\$391,704</b>	<b>\$75,239</b>	<b>\$400,678</b>	<b>\$86,518</b>	<b>\$792,382</b>	<b>\$161,757</b>
INDIRECT COSTS	\$33,295	\$6,395	\$34,058	\$7,354	\$67,353	\$13,749
<b>TOTAL M G PROGRAM</b>	<b>\$424,999</b>	<b>\$81,634</b>	<b>\$434,736</b>	<b>\$93,873</b>	<b>\$859,735</b>	<b>\$175,506</b>

B. SOURCES OF PROJECT FUNDS FOR CATHOLIC RELIEF SERVICES

	YEAR 1 -----
A.I.D. MATCHING GRANT	\$424,999
PRIVATE	
CASH	\$434,736
IN-KIND	\$0
	<hr/>
	\$859,735

TABLE 2

SED MATCHING GRANT  
CATHOLIC RELIEF SERVICES

## PROJECTED BUDGET FOR LAST QUARTER OF GRANT YEAR I

YEAR I

1 June 1989 - 31 August 1989

PROJECT ELEMENTS -----	A.I.D.			CRS		
	Budget Remaining	Projected Expenditures	Balance to Roll Over	Budget Remaining	Projected Expenditures	Balance to Roll Over
<b>BOLIVIA COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$52,526	\$11,050	\$41,476	\$47,992	\$22,100	\$25,892
EVALUATION	\$0	\$0	\$0	\$0	\$0	\$0
PROGRAM MANAGEMENT	\$16,526	\$4,176	\$12,350	\$21,368	\$7,175	\$14,193
<b>PERU COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$85,079	\$0	\$85,079	\$85,058	\$0	\$85,058
EVALUATION	\$0	\$0	\$0	\$0	\$0	\$0
PROGRAM MANAGEMENT	\$14,250	\$0	\$14,250	\$14,250	\$0	\$14,250
<b>SENEGAL COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$0	\$0	\$0	(\$509)	\$0	(\$509)
EVALUATION	\$0	\$0	\$0	\$0	\$0	\$0
PROGRAM MANAGEMENT	\$0	\$3,800	(\$3,800)	(\$385)	\$3,800	(\$4,185)
<b>TOGO COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$23,829	\$0	\$23,829	\$19,440	\$0	\$19,440
EVALUATION	\$0	\$0	\$0	\$0	\$0	\$0
PROGRAM MANAGEMENT	\$16,808	\$0	\$16,808	\$16,039	\$0	\$16,039
<b>THAILAND COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$49,500	\$7,949	\$41,551	\$53,482	\$7,949	\$45,533
EVALUATION	\$1,800	\$0	\$1,800	\$1,800	\$0	\$1,800
PROGRAM MANAGEMENT	\$4,369	\$10,562	(\$6,193)	\$2,916	\$10,563	(\$7,647)
HEADQUARTERS	\$51,778	\$12,380	\$39,398	\$52,709	\$12,380	\$40,329
TOTAL DIRECT COSTS	\$316,465	\$49,917	\$266,548	\$314,160	\$63,967	\$250,193
TOTAL INDIRECT COSTS	\$26,900	\$4,243	\$22,657	\$26,704	\$5,437	\$21,266
M G PROGRAM COSTS	\$343,365	\$54,160	\$289,205	\$340,863	\$69,404	\$271,459

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TABLE 3

SED MATCHING GRANT  
CATHOLIC RELIEF SERVICES

## PROJECTED BUDGET FOR GRANT YEAR II

Year II  
1 September 1989 - 31 August 1990

PROJECT ELEMENTS -----	A.I D.		CRS		Total Budgeted	Total Projections
	Budgeted	Current Projection	Budgeted	Current Projection		
-----	-----	-----	-----	-----	-----	-----
<b>BOLIVIA COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$55,871	\$89,650	\$56,029	\$89,650	\$111,900	\$179,300.00
EVALUATION	\$0	\$1,225	\$0	\$1,225	\$0	\$2,450.00
PROGRAM MANAGEMENT	\$14,885	\$15,875	\$14,885	\$15,875	\$29,770	\$31,750.00
<b>PERU COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$61,089	\$86,324	\$79,151	\$86,476	\$140,240	\$172,800.00
EVALUATION	\$0	\$0	\$0	\$0	\$0	\$0.00
PROGRAM MANAGEMENT	\$15,000	\$14,250	\$15,900	\$14,250	\$30,900	\$28,500.00
<b>SENEGAL COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$11,436	\$41,935	\$72,434	\$41,935	\$83,870	\$83,870.00
EVALUATION	\$0	\$1,287	\$0	\$1,288	\$0	\$2,575.00
PROGRAM MANAGEMENT	\$46,600	\$63,600	\$80,600	\$63,600	\$127,200	\$127,200.00
<b>TOGO COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$10,277	\$26,435	\$42,592	\$26,435	\$52,869	\$52,869.00
EVALUATION	\$1,345	\$1,345	\$1,345	\$1,345	\$2,690	\$2,690.00
PROGRAM MANAGEMENT	\$19,070	\$19,070	\$19,242	\$19,242	\$38,312	\$38,312.00
<b>THAILAND COUNTRY PROGRAM</b>						
PROGRAM ACTIVITY	\$25,809	\$91,170	\$152,841	\$91,170	\$178,650	\$182,340.00
EVALUATION	\$1,800	\$1,800	\$1,800	\$1,800	\$3,600	\$3,600.00
PROGRAM MANAGEMENT	\$15,700	\$15,700	\$15,700	\$15,700	\$31,400	\$31,400.00
HEADQUARTERS	\$112,823	\$81,642	\$112,823	\$81,642	\$225,646	\$163,284.00
TOTAL DIRECT COSTS	\$391,705	\$551,308	\$665,342	\$551,633	\$1,057,047	\$1,102,940
TOTAL INDIRECT COSTS	\$33,295	\$46,861	\$56,554	\$46,889		
M G PROGRAM COSTS	\$425,000	\$598,169 *	\$721,896	\$598,521		

NOTE: AID provided a straight-line commitment of \$425,000 annually with the provision of CRS' rolling over unexpended AID monies from one year to the next. Since full scale implementation begins in Grant Year II, budget expenditures can be expected to be low in Grant Year I and progressively increase during Grant Years II and III.

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TABLE 4

## FINANCIAL PROFILE OF CATHOLIC RELIEF SERVICES

Statement of Support, Revenue and Expenses  
and Changes in Fund Balances

Year Ended December 31, 1988  
With Comparative Totals for 1987  
(\$000's omitted)

	1988				Total all Funds	
	Current Funds		Land, Building and Equipment Fund	Endowment Fund	1988	1987
	General Fund	Grant Fund				
<b>Public support and revenue:</b>						
Public support:						
Bishops' Committee allocation	\$ 9,672	\$ —	\$ —	\$ —	\$ 9,672	\$ 10,407
Contributions:						
Cash:						
Operation Rice Bowl	2,657	—	—	—	2,657	4,002
Private contributions:						
United States sources	22,790	—	—	1,168	23,958	19,675
Other than United States sources	2,034	—	—	—	2,034	867
Recipient contributions	—	2,599	—	—	2,599	5,477
In kind (Note 1):						
United States sources	12,103	128,335	—	—	140,438	118,551
European Economic Community	—	5,215	—	—	5,215	6,411
Other European sources	—	4,333	—	—	4,333	—
Government and international organizations:						
Ocean freight	—	60,893	—	—	60,893	49,399
Grants and agreements:						
United States Government	313	27,149	—	—	27,462	11,248
Other than United States Government	—	1,242	—	—	1,242	1,540
International organizations	—	1,579	—	—	1,579	2,503
Revenue:						
Investment income	4,008	—	—	1,069	5,077	5,112
Gain on sale of securities	—	—	—	147	147	1,230
Gain on sale of equipment, buildings and vehicles	51	29	574	—	654	141
Other	336	—	—	—	336	452
Total support and revenue	<u>53,964</u>	<u>231,374</u>	<u>574</u>	<u>2,384</u>	<u>\$ 288,296</u>	<u>\$ 237,015</u>
<b>Expenses:</b>						
Program services:						
General welfare	2,472	19,572	127	—	\$ 22,171	\$ 37,308
Disaster and emergency relief	15,024	47,084	28	—	62,136	42,750
Refugee relief and resettlement	2,442	9,901	28	—	12,371	12,579
Human development	27,059	156,457	368	—	183,884	132,770
Total program services	<u>46,997</u>	<u>233,014</u>	<u>551</u>	<u>—</u>	<u>280,562</u>	<u>225,407</u>
Supporting services:						
Management and general	10,719	39	297	64	11,119	10,540
Public awareness	838	—	—	—	838	946
Fund raising	4,326	—	—	—	4,326	4,535
Total supporting services	<u>15,883</u>	<u>39</u>	<u>297</u>	<u>64</u>	<u>16,283</u>	<u>16,021</u>
Total expenses	<u>62,880</u>	<u>233,053</u>	<u>848</u>	<u>64</u>	<u>\$ 296,845</u>	<u>\$ 241,428</u>
(Deficiency) excess of public support and revenue over expenses	(8,916)	(1,679)	(274)	2,320		
<b>Other changes in fund balances:</b>						
Property and equipment acquisitions from General Fund	(703)	—	703	—		
Transfer of Endowment Fund income to General Fund	1,006	—	—	(1,006)		
Transfer of Endowment Fund income to land, building and equipment fund	—	—	3,350	(3,350)		
Fund balances, beginning of year	<u>66,965</u>	<u>5,158</u>	<u>4,280</u>	<u>16,731</u>		
Fund balances, end of year	<u>\$ 58,352</u>	<u>\$ 3,479</u>	<u>\$ 8,059</u>	<u>\$ 14,695</u>		

See notes to financial statements

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TABLE 5

SED MATCHING GRANT  
SUMMARY TABLE OF EXPENDITURES  
DURING 1 SEPTEMBER 1988 - 31 MAY 1989

## SUMMARY TABLE

	A.I.D.		CRS	
	Budget	Expenditure	Budget	Expenditure
PROJECT ELEMENTS				
PROGRAM ACTIVITIES				
TECHNICAL ASSISTANT				
PERSONNEL	\$61,670.00	\$18,227.20	\$61,670.00	\$18,227.20
PER DIEM/TRAVEL	\$11,705.00	\$5,891.16	\$13,305.00	\$5,025.54
PROCUREMENT	\$10,000.00	\$1,042.00	\$10,000.00	\$3,050.00
OTHER COSTS	\$750.00	\$ .00	\$750.00	\$ .00
TRAINING/WORKSHOP				
PERSONNEL	\$47,851.00	\$25,163.18	\$20,149.00	\$12,751.49
PER DIEM/TRAVEL	\$18,012.00	\$319.40	\$14,350.00	\$319.40
PROCUREMENT	\$5,850.00	\$ .00	\$16,800.00	\$ .00
OTHER COSTS	\$5,700.00	\$ .00	\$5,700.00	\$ .00
PROJECT FUNDING	\$151,818.00	\$ .00	\$162,182.00	\$5,810.00
EVALUATION				
PERSONNEL	\$ .00	\$ .00	\$ .00	\$ .00
PER DIEM/TRAVL	\$1,800.00	\$ .00	\$1,800.00	\$ .00
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00
PROJECT MANAGEMENT				
PERSONNEL	\$51,598.00	\$13,651.74	\$33,902.00	\$6,241.70
PER DIEM/TRAVEL	\$7,630.00	\$7,668.92	\$3,016.00	\$3,467.07
PROCUREMENT	\$1,200.00	\$ .00	\$47,000.00	\$30,211.33
OTHER COSTS	\$16,120.00	\$3,274.95	\$14,562.00	\$1,414.73
TOTAL PROJECT	\$391,704.00	\$75,238.55	\$405,186.00	\$86,518.46
SUMMARY OF COST ELEMENTS				
PERSONNEL/CONSULTANTS	\$161,119.00	\$57,042.12	\$115,721.00	\$37,220.39
TRAVEL & PER DIEM	\$39,147.00	\$13,879.48	\$32,471.00	\$8,812.01
PROCUREMENT	\$17,050.00	\$1,042.00	\$73,800.00	\$33,261.33
PROJECT FUNDING	\$151,818.00	\$ .00	\$162,182.00	\$5,810.00
OTHER COSTS	\$22,570.00	\$3,274.95	\$21,012.00	\$1,414.73
TOTAL	\$391,704.00	\$75,238.55	\$405,186.00	\$86,518.46

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1. BOLIVIA COUNTRY EXPENDITURES

YEAR 1: September 1-May 31, 1989

	Budget	Expenditures		Total	Budget Balance
		A.I.D.	CRS		
<b>PROGRAM ACTIVITIES</b>					
<b>TECHNICAL ASSISTANT</b>					
PERSONNEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PER DIEM/TRAVEL	\$4,200.00	\$690.62	\$690.63	\$1,381.25	\$2,818.75
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
<b>TRAINING/WORKSHOP</b>					
PERSONNEL	\$13,600.00	\$ .00	\$ .00	\$ .00	\$13,600.00
PER DIEM/TRAVEL	\$1,000.00	\$ .00	\$ .00	\$ .00	\$1,000.00
PROCUREMENT	\$3,100.00	\$ .00	\$ .00	\$ .00	\$3,100.00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PROJECT FUNDING	\$80,000.00	\$ .00	\$ .00	\$ .00	\$80,000.00
<b>EVALUATION</b>					
PERSONNEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PER DIEM/TRAVL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
<b>PROJECT MANAGEMENT</b>					
PERSONNEL	\$21,000.00	\$2,836.85	\$2,536.85	\$5,373.70	\$15,626.30
PER DIEM/TRAVEL	\$ .00	\$538.38	\$538.38	\$1,076.76	(\$1,076.76)
PROCUREMENT	\$19,200.00	\$ .00	\$258.00	\$258.00	\$18,942.00
OTHER COSTS	\$4,700.00	\$248.95	\$48.95	\$297.90	\$4,402.10
<b>Totals:</b>	<b>\$146,800.00</b>	<b>\$4,314.80</b>	<b>\$4,072.81</b>	<b>\$8,387.61</b>	<b>\$138,412.39</b>

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2. PERU COUNTRY EXPENDITURES

YEAR 1: September 1-May 31, 1989

	Expenditures				Budget Balance
	Budget	A.I.D.	CRS	Total	
<b>PROGRAM ACTIVITIES</b>					
<b>TECHNICAL ASSISTANT</b>					
PERSONNEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PER DIEM/TRAVEL	\$1,800.00	\$ .00	\$173.00	\$173.00	\$1,627.00
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
<b>TRAINING/WORKSHOP</b>					
PERSONNEL	\$4,000.00	\$1,245.00	\$1,245.00	\$2,490.00	\$1,510.00
PER DIEM/TRAVEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
<b>PROJECT FUNDING</b>	\$167,000.00	\$ .00	\$ .00	\$ .00	\$167,000.00
<b>EVALUATION</b>					
PERSONNEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PER DIEM/TRAVL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
<b>PROJECT MANAGEMENT</b>					
PERSONNEL	\$26,000.00	\$ .00	\$ .00	\$ .00	\$26,000.00
PER DIEM/TRAVEL	\$500.00	\$ .00	\$ .00	\$ .00	\$500.00
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$2,000.00	\$ .00	\$ .00	\$ .00	\$2,000.00
<b>Totals:</b>	<b>\$201,300.00</b>	<b>\$1,245.00</b>	<b>\$1,418.00</b>	<b>\$2,663.00</b>	<b>\$198,637.00</b>

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3. SENEGAL COUNTRY EXPENDITURES

YEAR 1: September 1-May 31, 1989

	Budget	A.I.D.	Expenditures		Total	Budget Balance
			CRS			
<b>PROGRAM ACTIVITIES</b>						
<b>TECHNICAL ASSISTANT</b>						
PERSONNEL	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
PER DIEM/TRAVEL	\$1,600.00	\$ .00	\$508.70		\$508.70	\$1,091.30
PROCUREMENT	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
<b>TRAINING/WORKSHOP</b>						
PERSONNEL	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
PER DIEM/TRAVEL	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
PROCUREMENT	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
PROJECT FUNDING	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
<b>EVALUATION</b>						
PERSONNEL	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
PER DIEM/TRAVL	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
PROCUREMENT	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
<b>PROJECT MANAGEMENT</b>						
PERSONNEL	\$2,000.00	\$ .00	\$ .00		\$ .00	\$2,000.00
PER DIEM/TRAVEL	\$716.00	\$ .00	\$136.77		\$136.77	\$579.23
PROCUREMENT	\$ .00	\$ .00	\$ .00		\$ .00	\$ .00
OTHER COSTS	\$192.00	\$ .00	\$248.09		\$248.09	(\$56.09)
<b>Totals:</b>	<b>\$4,508.00</b>	<b>\$ .00</b>	<b>\$893.56</b>		<b>\$893.56</b>	<b>\$3,614.44</b>

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4. TOGO COUNTRY EXPENDITURES

YEAR 1: September 1-May 31, 1989

	Budget	Expenditures		Total	Budget Balance
		A.I.D.	CRS		
<b>PROGRAM ACTIVITIES</b>					
<b>TECHNICAL ASSISTANT</b>					
PERSONNEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PER DIEM/TRAVEL	\$5,380.00	\$1,547.33	\$ .00	\$1,547.33	\$3,832.67
PROCUREMENT	\$10,000.00	\$ .00	\$ .00	\$ .00	\$10,000.00
OTHER COSTS	\$1,500.00	\$ .00	\$ .00	\$ .00	\$1,500.00
<b>TRAINING/WORKSHOP</b>					
PERSONNEL	\$21,000.00	\$7,725.39	\$ .00	\$7,725.39	\$13,274.61
PER DIEM/TRAVEL	\$3,662.00	\$ .00	\$ .00	\$ .00	\$3,662.00
PROCUREMENT	\$11,000.00	\$ .00	\$ .00	\$ .00	\$11,000.00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PROJECT FUNDING	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
<b>EVALUATION</b>					
PERSONNEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PER DIEM/TRAVL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
<b>PROJECT MANAGEMENT</b>					
PERSONNEL	\$14,300.00	\$5,851.58	\$ .00	\$5,851.58	\$8,448.42
PER DIEM/TRAVEL	\$5,330.00	\$4,338.62	\$ .00	\$4,338.62	\$991.38
PROCUREMENT	\$29,000.00	\$ .00	\$25,333.33	\$25,333.33	\$3,666.67
OTHER COSTS	\$19,740.00	\$ .00	\$ .00	\$ .00	\$19,740.00
<b>Totals:</b>	<b>\$120,912.00</b>	<b>\$19,462.92</b>	<b>\$25,333.33</b>	<b>\$44,796.25</b>	<b>\$76,115.75</b>

5. THAILAND COUNTRY EXPENDITURES

YEAR 1: September 1-May 31, 1989

Year 2

	Budget	Expenditures		Total	Budget Balance
		A.I.D.	CRS		
PROGRAM ACTIVITIES					
TECHNICAL ASSISTANT					
PERSONNEL	\$20,840.00	\$287.20	\$287.20	\$574.40	\$20,265.60
PER DIEM/TRAVEL	\$12,030.00	\$3,653.21	\$3,653.21	\$7,306.42	\$4,723.58
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
TRAINING/WORKSHOP					
PERSONNEL	\$14,400.00	\$6,352.79	\$4,605.49	\$10,958.28	\$3,441.72
PER DIEM/TRAVEL	\$3,000.00	\$319.40	\$319.40	\$638.80	\$2,361.20
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$11,000.00	\$ .00	\$ .00	\$ .00	\$11,000.00
PROJECT FUNDING	\$67,000.00	\$ .00	\$5,810.00	\$5,810.00	\$61,190.00
EVALUATION					
PERSONNEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PER DIEM/TRAVL	\$3,600.00	\$ .00	\$ .00	\$ .00	\$3,600.00
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PROJECT MANAGEMENT					
PERSONNEL	\$22,200.00	\$4,963.31	\$3,704.85	\$8,668.16	\$13,531.84
PER DIEM/TRAVEL	\$4,100.00	\$2,791.92	\$2,791.92	\$5,583.84	(\$1,483.84)
PROCUREMENT	\$ .00	\$ .00	\$4,620.00	\$4,620.00	(\$4,620.00)
OTHER COSTS	\$4,000.00	\$3,026.00	\$1,117.69	\$4,143.69	(\$143.69)
<b>Totals:</b>	<b>\$162,170.00</b>	<b>\$21,393.83</b>	<b>\$26,909.76</b>	<b>\$48,303.59</b>	<b>\$113,866.41</b>

6. HEADQUARTER'S EXPENDITURE

YEAR 1: September 1-May 31, 1989

	Budget	Expenditures		Total	Budget Balance
		A.I.D.	CRS		
<b>PROGRAM ACTIVITIES</b>					
<b>TECHNICAL ASSISTANT</b>					
PERSONNEL	\$102,500.00	\$17,940.00	\$17,940.00	\$35,880.00	\$66,620.00
PER DIEM/TRAVEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PROCUREMENT	\$10,000.00	\$1,042.00	\$3,050.00	\$4,092.00	\$5,908.00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
<b>TRAINING/WORKSHOP</b>					
PERSONNEL	\$15,000.00	\$9,840.00	\$6,901.00	\$16,741.00	(\$1,741.00)
PER DIEM/TRAVEL	\$24,700.00	\$ .00	\$ .00	\$ .00	\$24,700.00
PROCUREMENT	\$8,600.00	\$ .00	\$ .00	\$ .00	\$8,600.00
OTHER COSTS	\$400.00	\$ .00	\$ .00	\$ .00	\$400.00
PROJECT FUNDING	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
<b>EVALUATION MANAGEMENT</b>					
PERSONNEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PER DIEM/TRAVL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
<b>GENERAL MANAGEMENT</b>					
PERSONNEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PER DIEM/TRAVEL	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
PROCUREMENT	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
OTHER COSTS	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
<b>Totals:</b>	<b>\$161,200.00</b>	<b>\$28,822.00</b>	<b>\$27,891.00</b>	<b>\$56,713.00</b>	<b>\$104,487.00</b>

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## APPENDIX B

**COUNTRY INFORMATION FOR  
A.I.D.-SUPPORTED PVO PROJECTS**

Organization: Catholic Relief Services  
 Project/Grant No.: OTR-01580A-00-8240-00  
 Grant Dates: 8/31/88 - 9/1/93  
 Funding Mechanism: M.G.  
 (i.e., MG, OPG, Contract, CA, Etc.)

\*COUNTRY NAME OR HEADQUARTERS: CRS/BOLIVIA

**Project Purpose:** (limit to 40 words or less)

CRS/Bolivia will support activities of Bolivian NGOs in providing credit and technical assistance to small scale entrepreneurs (both merchants and producers).

**Project Implementation:**

Start Date: Sept. 1, 1988 Estimated Completion Date: August 31, 1993  
 Status: (limit to 25 words or less)

Partnership with NGOs in La Paz established, local institutional capacity for integrating micro-enterprise and community development reviewed. Program concept paper negotiated with counterparts and design paper finalized.

**Project Funding:**

Year	I	Year	II	Year	III	Year	IV	Year	V	TOTAL
AIDS	73,367	AIDS	\$106,750	AIDS	68,081	AIDS	68,081	AIDS	68,081	383,399
PVOS	73,433	PVOS	106,750	PVOS	68,080	PVOS	68,081	PVOS	68,080	385,385
OTHER		OTHER		OTHER		OTHER		OTHER		
INKIND		INKIND		INKIND		INKIND		INKIND		
LOCAL		LOCAL		LOCAL		LOCAL		LOCAL		
TOTAL	146,800	TOTAL	213,500	TOTAL	136,161	TOTAL	136,162	TOTAL	136,161	768,784

**Location in Country:** (Region, District, Village - Be Specific)

La Paz, Bolivia

**PVO Representative in Country:** (if any) or **Program Manager for Headquarters:**

(name) James Noel - Catholic Relief Services-USCC  
 (address) Corneta Mamani No. 1973, La Paz  
 (phone) 591-2-3-23335, 3-52293

**Local Counterpart/Host Country Agency:** (If no PVO representative)

N/A

\*Complete separate sheet for each country program and headquarters.

**COUNTRY INFORMATION FOR  
A.I.D.-SUPPORTED PVO PROJECTS**

Organization: Catholic Relief Services-USCC  
 Project/Grant No.: OTR-0158-A-00-8240-00  
 Grant Dates: 8/31/89 - 9/1/93  
 Funding Mechanism: M.G.  
 (i.e., MG, OPG, Contract, CA, Etc.)

\*COUNTRY NAME OR HEADQUARTERS: CRS/PERU

**Project Purpose:** (limit to 40 words or less)

Purpose is to provide management training to small businessmen for more effective use of credit and other available resources and to work with local intermediary organizations to develop their institutional capacity to provide technical services to small businesses and the informal sector.

**Project Implementation:**

Start Date: Sept. 1, 1988 Estimated Completion Date: August 31, 1993  
 Status: (limit to 25 words or less)

Discussions held with local institutions on complimenting their micro-enterprise credit delivery systems with management training. Design document to be developed further and presented in Fall '89.

**Project Funding:**

Year I	Year II	Year III	Year IV	Year V	TOTAL
AIDS \$ 100,574	AIDS \$ 100,574	AIDS \$ 58,249	AIDS \$ 58,249	AIDS \$ 58,250	338,964
PVOS \$ 100,726	PVOS \$ 100,574	PVOS \$ 58,249	PVOS \$ 58,249	PVOS \$ 58,249	412,979
OTHER _____	OTHER _____	OTHER _____	OTHER _____	OTHER _____	_____
INKIND _____	INKIND _____	INKIND _____	INKIND _____	INKIND _____	_____
LOCAL _____	LOCAL _____	LOCAL _____	LOCAL _____	LOCAL _____	_____
TOTAL 201,300	TOTAL 201,148	TOTAL 116,498	TOTAL 116,498	TOTAL 116,499	751,943

**Location in Country:** (Region, District, Village - Be Specific)  
 Lima, Peru

**PVO Representative in Country:** (if any) or **Program Manager for Headquarters:**

(name) Christine Tucker - Catholic Relief Services-USCC  
 (address) Parque Internacional de Industrie y Commerico, Lima, Peru  
 (phone) 51-07-65

**Local Counterpart/Host Country Agency:** (If no PVO representative)

N/A

\*Complete separate sheet for each country program and headquarters.

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COUNTRY INFORMATION FOR  
A.I.D.-SUPPORTED PVO PROJECTS

Organization: Catholic Relief Services  
 Project/Grant No.: OTR-0158-A-00-8240-00  
 Grant Dates: 8/31/88 - 9/1/93  
 Funding Mechanism: M.G.  
 (i.e., MG, OPG, Contract, CA, Etc.)

\*COUNTRY NAME OR HEADQUARTERS: CRS/SENEGAL

Project Purpose: (limit to 40 words or less)

Project purpose is to build the indigenous institutional capacity in Senegal to provide effective management extension services to small scale enterprises.

Project Implementation:

Start Date: Sept. 1, 1988 Estimated Completion Date: August 31, 1993  
 Status: (limit to 25 words or less)

Senegal sought approval to begin implementation a year early and conducted an institutional survey of local counterparts. Develops strategy for program components and reviewed lessons learned from EEC monetization for seed/cereal banks.

Submission of design papers targeted for Jan '90.

Project Funding:

	Year I	Year II	Year III	Year IV	Year V	TOTAL
AID\$	0	106,822	49,894	24,399	102,994	295,323
PVOS	0	104,248	112,826	84,551	102,994	453,405
OTHER						
INKIND						
LOCAL						
TOTAL	0	211,070	162,720	168,950	205,988	748,728

Location in Country: (Region, District, Village - Be Specific)

Dakar, Senegal

PVO Representative in Country: (if any) or Program Manager for Headquarters:

(name) Laverne Pierce - Catholic Relief Services-USCC  
 (address) Immeuble des Eaux, 72, Blvd. de la Republique 1er Etage, Dakar,  
 (phone) 21-46-21, 22-22-75 Senegal

Local Counterpart/Host Country Agency: (If no PVO representative)

N/A

\*Complete separate sheet for each country program and headquarters.

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COUNTRY INFORMATION FOR  
A.I.D.-SUPPORTED PVO PROJECTS

Organization: Catholic Relief Services  
 Project/Grant No.: OTR-0158-A-00-8240-00  
 Grant Dates: 8/31/88 - 9/1/93  
 Funding Mechanism: M.G.  
 (i.e., MG, OPG, Contract, CA, Etc.)

\*COUNTRY NAME OR HEADQUARTERS: CRS/TOGO

Project Purpose: (limit to 40 words or less)

Purpose is to provide management training to rural artisans and to build the capability of local counterparts to provide technical services in credit management, marketing and production techniques.

Project Implementation:

Start Date: Sept. 1, 1988 Estimated Completion Date: August 31, 1993  
 Status: (limit to 25 words or less)

Pre-project feasibility analysis completed, institutional analysis and strategy for strengthening and widening the services of GIPATO developed. Experimental training in appropriate technologies initiated and design document finalized.

Project Funding:

					TOTAL
Year I	Year II	Year III	Year IV	Year V	
AID\$ \$60,100	AID\$ \$46,849	AID\$ \$41,791	AID\$ \$41,791	AID\$ \$41,791	216,015
PVO\$ 60,812	PVO\$ \$46,850	PVO\$ \$41,791	PVO\$ \$41,791	PVO\$ \$41,791	249,342
OTHER	OTHER	OTHER	OTHER	OTHER	
INKIND	INKIND	INKIND	INKIND	INKIND	
LOCAL	LOCAL	LOCAL	LOCAL	LOCAL	
TOTAL 120,912	TOTAL \$93,699	TOTAL \$83,582	TOTAL \$83,582	TOTAL \$83,582	465,357

Location in Country: (Region, District, Village - Be Specific)

Sokome, Togo

PVO Representative in Country: (if any) or Program Manager for Headquarters:

(name) Nancy Mickelsen Catholic Relief Services-USCC  
 (address) 9 Rue Brazza, Lome, Togo  
 (phone) 210662, 212088

Local Counterpart/Host Country Agency: (If no PVO representative)

N/A

\*Complete separate sheet for each country program and headquarters.

**COUNTRY INFORMATION FOR  
A.I.D.-SUPPORTED PVO PROJECTS**

Organization: Catholic Relief Services  
 Project/Grant No.: OTR-0158-A-00-8240-00  
 Grant Dates: 8/31/88 - 9/1/93  
 Funding Mechanism: M.G.  
 (i.e., MG, OPG, Contract, CA, Etc.)

\*COUNTRY NAME OR HEADQUARTERS: CRS/THAILAND

**Project Purpose:** (limit to 40 words or less)

Purpose is to enable landless and small farmers to diversify income sources, away from primary commodities towards alternative land uses and value added processes; to provide management assistance and enable them to gain access to greater amounts of credit.

**Project Implementation:**

Start Date: Sept. 1, 1988 Estimated Completion Date: August 31, 1993  
 Status: (limit to 25 words or less)

Pre-project feasibility analysis conducted, base-line data compiled and NGO workshop in community banking methodology sponsored. Two test women community banks inuaguarated. Detailed implementation plans developing.

**Project Funding:**

Year I	Year II	Year III	Year IV	Year V	TOTAL
AIDS\$ 77,063	AIDS\$ 108,670	AIDS\$ 114,663	AIDS\$ 114,663	AIDS\$ 114,663	323,274
PVOS\$ 85,107	PVOS\$ 108,670	PVOS\$ 114,663	PVOS\$ 114,663	PVOS\$ 114,663	744,214
OTHER	OTHER	OTHER	OTHER	OTHER	
INKIND	INKIND	INKIND	INKIND	INKIND	
LOCAL	LOCAL	LOCAL	LOCAL	LOCAL	
TOTAL 162,170	TOTAL 217,340	TOTAL 229,326	TOTAL 229,326	TOTAL 229,326	1,067,488

**Location in Country:** (Region, District, Village - Be Specific)

Northeast Provinces - the Korat Triangle and Ubon-Udorn area

**PVO Representative in Country:** (if any) or **Program Manager for Headquarters:**

(name) Timothy Ryan - Catholic Relief Services-USCC  
 (address) 89/25 Vithayu Place, Site #14, Wireless Road, Putumwan District,  
 (phone) 252-4829, 4830, 4831, 4832, 4833 Bangkok 10500

**Local Counterpart/Host Country Agency:** (If no PVO representative)

N/A

\*Complete separate sheet for each country program and headquarters.

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**COUNTRY INFORMATION FOR  
A.I.D.-SUPPORTED PVO PROJECTS**

Organization: Catholic Relief Services  
 Project/Grant No.: OTR-0158-A00-8240-00  
 Grant Dates: 8/31/88 - 9/1/93  
 Funding Mechanism: M.G.  
 (i.e., MG, OPG, Contract, CA, Etc.)

\*COUNTRY NAME OR HEADQUARTERS: Headquarters

Project Purpose: (limit to 40 words or less)

Through the resources provided by the Matching Grant, CRS will develop a solid institutional foundation from which it can expand its SED programming activities throughout the developing world.

Project Implementation:

Start Date: Sept. 1, 1988 . Estimated Completion Date: August 31, 1993  
 Status: (limit to 25 words or less)

First draft of SED Strategic Program Plan completed.  
 SED survey taken of CRS field offices and results tabulated and analyzed. Technical assistance given to each of the pilot programs and financial management systems installed.

Project Funding:

Year I	Year II	Year III	Year IV	Year V	TOTAL
AIDS \$ 80,600	AIDS \$ 81,642	AIDS \$ 79,769	AIDS \$ 76,769	AIDS \$ 79,769	401,549
PVOS \$ 80,600	PVOS \$ 81,642	PVOS \$ 79,769	PVOS \$ 76,769	PVOS \$ 79,769	401,549
OTHER _____	_____				
INKIND _____	_____				
LOCAL _____	_____				
TOTAL 161,200	TOTAL 163,284	TOTAL 159,538	TOTAL 159,538	TOTAL 159,538	803,098

Location in Country: (Region, District, Village - Be Specific)

Headquarters 1011 First Ave., NY, NY 10022

PVO Representative in Country: (if any) or Program Manager for Headquarters:

(name) Lawrence Yanovitch, SED Coordinator  
 (address) Catholic Relief Services 1011 First Ave., New York, N.Y. 10022  
 (phone) (212) 838-4700  
 Alternative - Grace Hauck, Grants Manager - same address

Local Counterpart/Host Country Agency: (If no PVO representative)

N/A

\*Complete separate sheet for each country program and headquarters.

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**APPENDIX C**

## SED MATCHING GRANT PROGRAM

### LOGICAL FRAMEWORK

#### OBJECTIVES

##### GOAL:

To create employment and income opportunities for the poor in developing countries in which CRS operates by promoting a people-centered development process.

##### PURPOSE:

To establish a foundation from which CRS can build its institutional capacity to implement successful SED projects in the developing world.

##### OUTPUTS:

1. Implementation and institutionalization of 4-5 years of Pilot Projects in 5 targeted countries

#### INDICATORS

- Increased employment in small enterprises
- Increased financial viability, productivity and efficiency of small enterprises
- Diversification of sources of income in poor communities
- Improved financial and management capabilities of small entrepreneurs
- Increased income of small entrepreneurs, employees and local communities

By 1993, CRS will demonstrate its institutional capacity to implement SED projects by:

- identification of SED as a principal programming activity in the agency;
- appropriate SED project design analysis & implementation
- growth in resource flows allocated to SED
- effectiveness of CRS assistance relative to objectives of SED pilot project designs

- By 1993 CRS will have implemented 5 SED Pilot Project Programs in Bolivia, Peru, Senegal, Togo and Thailand.

#### MEANS OF VERIFICATION

- Local government and international PVO surveys of access to income and employment
- Surveys of income distribution data
- Surveys of Pilot Prjt. beneficiaries to determine their status

Number of SED activities in the CRS portfolio

- SED projects realize objectives and goals
- Use of the MIS
- Increase in resource flows
- Receipt of detailed progress reports of SED Pilot Projects every six months

- Number of Pilot Projects institutionalized

#### ASSUMPTION

- small enterprises are growth catalysts forspurring community income and employment opportunities
- Surveys already exist
- Necessary addition

- SED activities become an important programming area in CRS

- Program receives key local government and institutional support

- Local governments and counterparts continue to support Pilot Project Program.

<u>OBJECTIVES:</u>	<u>INDICATORS</u>	<u>MEANS OF VERIFICATION</u>	<u>ASSUMPTION</u>
2. Increased SED activities in CRS portfolio	- Change in the percentage of SED Programming activities in CRS' overall development portfolio	- Number of activities and beneficiaries	
3. Development of integrated strategic planning for the agency's SED Program	- SED needs assessment for each of CRS' three regions	- SED activities are full under strategic plan	
4. Development of CRS personnel SED capabilities through training, consultancy, technical assistance and resource development	<ul style="list-style-type: none"> <li>- An integrated agency-wide SED Strategic Plan</li> <li>- a working roster of specialized SED consultants</li> <li>- 4 SED Headquarters symposiums on SED Strategies and Methodologies.</li> <li>- 7 subregional SED workshops providing training to 91 CRS field staff</li> <li>- SED training materials</li> <li>- SED field handbooks on methodology for project design, monitoring and implementation</li> <li>- System for technical material dissemination to the field.</li> <li>- Computerized reference list of both internal and external SED materials.</li> </ul>	<ul style="list-style-type: none"> <li>- Number and attendance at workshops</li> <li>- Kinds of training materials and handbooks available</li> <li>- Access to technical material in the field</li> </ul>	
5. Developing Management System to refine, apply and disseminate SED programming methodologies appropriate to CRS' organizational goals and objectives.	- successful utilization of CRS computerized Management Information System (MIS) for monitoring and evaluation of SED program activities		

.../...

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<u>OBJECTIVES:</u>	<u>INDICATORS</u>	<u>MEANS OF VERIFICATION</u>	<u>ASSUMPTION</u>
<u>INPUTS:</u>			
1. Project and support funds	Financial Resources	- Number of Pilot Project	- Funds are available on time
2. CRS administration and management support	Totalling \$2,125,000 - AID \$2,125,000 - CRS (minimum)	- Number and type of revolving loan funds	- Revolving loan funds do not decapitalize
3. CRS field staff administration and management support		- Number of workshops	- Appropriate staff available
4. Counterpart administration and management support			
5. Seed capital for revolving loan funds			
6. Technical visits to Pilot Projects			
7. Outside consultancy services			
8. Office and vehicle procurement			
9. Expenses for headquarters and subregional workshops			

(P)