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LATIN AMERICA AND THE CARIBBEAN

EDUCATION AND HUMAN RESOURCES
TECHNICAL SERVICES PROJECT

MONITORING AND EVALUATION SYSTEMS

USAID - NAPA Cooperative Agreement

Phase One Report

February 1992

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Monitoring and Evaluation System
Technical Assistance
Consultantship

Overview

Over the past six weeks, I assisted the National Association of Partners of the Americas with the development of monitoring and evaluation systems which would fully respond to the reporting requirements of the A.I.D. Cooperative Agreement, as well as meet NAPA's internal management needs. This work was performed under contract with Management Systems International. The Statement of Work consisted of the following:

1. Identify all project and administration elements which will be routinely captured by the proposed monitoring and evaluation system;

2. Recommend an integrated data base structure which can manage the gathering, processing and reporting of this information;

3. Design the prototype computer entry screens which meet the requirements of the Cooperative Agreement and respond to the needs and capacities of the NAPA staff and Partnership;

4. Recommend an implementation plan and timetable for installation of the system which responds to the requirements of the Cooperative Agreement and takes into consideration NAPA's plans for installing new computer and communication systems. This plan would include a description of technical assistance required Phase Two and would recommend possible collaborative efforts with other A.I.D. programs; and,

5. Involve the full NAPA staff in the development of the system, beginning with a workshop at their January retreat.

To accomplish the Statement of Work objectives, I conducted several in-person interviews with key NAPA staff and analyzed relevant NAPA documents and studies. In addition, I met four times with the A.I.D. project officer for NAPA to review the current progress and to obtain further guidance. The January retreat also provided an excellent opportunity to engage most of the NAPA staff in discussions and exercises on the design of the monitoring and evaluation system.

This Phase One Report is organized according to the five Statement of Work objectives. For each of these headings, I present my findings, the rationales for each and the work remaining for Phase Two (which are then incorporated into the recommended implementation plan).

Identification of Monitoring & Evaluation Elements

The Cooperative Agreement requires considerable reporting on NAPA's project activities and its progress towards strengthening its Partnership structures. NAPA's current sources for this information are extensive, but they are not integrated or organized for quick access.

The foundation for the proposed Cooperative Agreement monitoring and evaluation system is a comprehensive set of information *elements* which must be gathered, organized and stored for retrieval as needed. The full range of these data elements are displayed in the protoytpe computer entry screens found in the Attachment section of this report. They include the simple contact information for a Partnership office to the impact results of projects in the field.

Also addressed in this section are the strategies for capturing this information and maintaining its currency. Clearly, the recommendations call for an integrated, computer-based system that is accessible by each NAPA staff person and over time will also reach to the Partnerships northern and southern committees.

Focus on the Parthership Representatives

This monitoring and evaluation system is focused on the NAPA Partnership Representatives. The Reps are the access points into NAPA for virtually all information germaine to the Cooperative Agreement. They all have, or will have computers at their desks capable of managing the required information handling tasks. In large part, the monitoring and evaluation instruments described in this report are the tools which help the Reps perform their assigned tasks more efficiently and integrate their individual efforts with all of NAPA.

Information Sources

Described below are the data sources which should be maintained for gathering this needed information. As is evidenced by my recommendations for each, these sources will be linked into a mutually supporting framework, so that the information gathered for one will usually add to the breadth, currency and accuracy of information coming from other sources. A diagram of these file relationships is provided on page 6.

- **The Excellence Program & Partnership Rechartering** - Each Partnership is required to submit an annual, written "checklist" that details their progress on key organizational indicators, such as the composition of their membership, structure of subcommittes, long-term objectives, the name and purposes of each project, etc.

  Recommendations:

  1. Revise the rechartering forms so that NAPA staff can readily enter the data into a computer. The Partnership Data Entry computer screens on page A-6 illustrate how the rechartering responses are quantified and categorized for establishing trend lines and other comparisons necessary for A.I.D. and NAPA analysis.

The current rechartering form seeks the appropriate information, but its questions could be better organized so that the responses better link the goals, objectives and activities for each committee. If rewriting the rechartering form poses too much difficulty, the NAPA staff could interpret the existing responses to also obtain these linkages . I provide an example of a restructured set of questions on page A-21.

2. Apply increased effort to obtaining fully completed rechartering forms from the Partners. I recommend that the Representatives regularly receive work sheets (generated from the Partnership file) detailing missing information so that the Reps can efficiently telephone or write to those Partnerships to obtain this information.

- **Trip requests & reports** - Each NAPA supported trip requires a description of the purposes of the travel, the populations served, and other relevant information.

  Recommendations:

  1. Revise the trip request form so that it, too, is better geared for computerization. An illustration of the data entry screens for trip requests is given on page A-16.
  2. As illustrated on those screens, expand the information recorded for trip requests to cover the monitoring and evaluation requirements of the Cooperative Agreement. These trips are excellent opportunities to obtain program impact results and to update Partnership membership and long range planning information.
  3. Improve the linkages to the file information on small grants and to NAPA's financial accounting system. The Grant# field on the recommended data entry screen enables tracking and later statistical analysis by funding source (see Grants entry screen on page A-14). A Social Security number for the travelers and the accounting codes in the Grants screen are links to NAPA's accounting files. Further discussion with NAPA financial management staff will fully flesh out all these interactions.
  4. Assign the "flow-control" responsibilities for the trip information to the Rep for the involved Partnership. The Rep would use the Trip Request computer screens, seen on page A-16, to oversee the full cycle of operations, from registering the background information for the request, to ensuring that the trip report was returned on time.

- **Partner Representative Contact Log** - Each Rep currently uses a variety of highly individualized methods for handling their contact logs — from handwritten yellow tablets to the use of word processing software. As such, these logs are minimally effective in gathering information pertinent to the Cooperative Agreement.

  Recommendations:

  1. Create standardized, entry screens for handling the contact logs for all staff. Shown on page A-20, these screens would be used for each substantive contact by telephone, mail, FAX or visit. The screens are also be able to call up other computer files (on

trips, Partner profiles, etc.) so that updates in their information are readily made.

2. Provide data search and retrieval properties for the contact log file that allows staff to look up contacts made by each other (e.g., viewing contacts for a specified country, type of assistance, etc.). This improves coordination among staff and facilitates reporting under the requirements of the Cooperative Agreement.

- **People file registry** - The current registry of information is a mix of files that capture only the principal leaders of the Partnerships and very limited information on donors. A directory of Partnerships is produced semi-annually.

  Recommendations:

  1. Create a single set of standarized entry screens that profile all types of individuals that become involved with NAPA and the Partnerships — the officers, members, resource people and others of significance. These screens are shown on page A-1.

  2. Establish linkages between this people information and all the other files involving these people - as travelers, project contacts, donors, trainers, trainees, etc. In this way the gender, nationality and other statistical information wanted by A.I.D. on these activities can be generated.

- **Training logs** - There is presently no standarized process for storing information on trainings offered by NAPA or for those under the aegis of its Partnerships.

  Recommendations

  1. Establish standardized data entry screens for registering all trainings. These screens profile the basic nature and purposes of each training. A set of subordinate screens would also be available for registering the trainees and evaluation results for each training.

  2. Develop a portable version of these screens that could be readily loaded onto the computers of contractor trainers so that they would be able to directly enter the information for the training (and, as an incentive, also be able to report information useful for their own purposes).

- **Auxiliary surveys and reportings** - Special surveys, reports from NAPA Fellows, evaluation trips, etc. provide needed information not otherwise obtainable.

  Recommendations:

  1. Use the data entry screens illustrated in this report to handle the information coming from special surveys, evaluation trips and the like. For example, the entry screens for the trip reports can be used for on-site evaluations; the projects entry screens are suitable for recording survey projects. Once entered, the information

from these other sources can then be libraried for quick reference.

2. Explore the capabilities of the Fellows program to improve the comprehensiveness and quality of the information sources, *and* to then model the way this information can be communicated directly from the field to the NAPA computer system:

   - Where possible, have a Fellow conduct an on-site project evaluation, using a paper format that mirrors that of the computer entry screen; for those Fellows with local access to a computer, enable them to enter the information onto their computer for transfer to NAPA by disk file or electronic communication.

   - Acquaint the 1992 Fellows on the computer entry screens so that they can advise local Partnership members on their availability for direct transfer of information to NAPA by those Partners with local computer capabilities.

3. Make certain that the computer formats already being developed by the Emergency Preparedness Program and other early innovators are compatible with the Project screens on page A-10.

- **Donor and Grant files** - The identification of all individual, corporate and institutional donors is currently a mix of computerized files and mailing lists.

  Recommendations:

  1. Establish a standardized entry screen capable of handling donations from all types of givers, as illustrated on page A-4. This screen is linked to the People file so that the donations can be categorized by their source.

  2. Create a grants and contracts file that categorizes and provides needed background information on these resources. The entry screens for this file are illustrated on page A-14. This information, too, is then linked to the Partnerships, projects and trips receiving them, so as to furnish A.I.D with the statistical information it seeks.

Data Base Structure

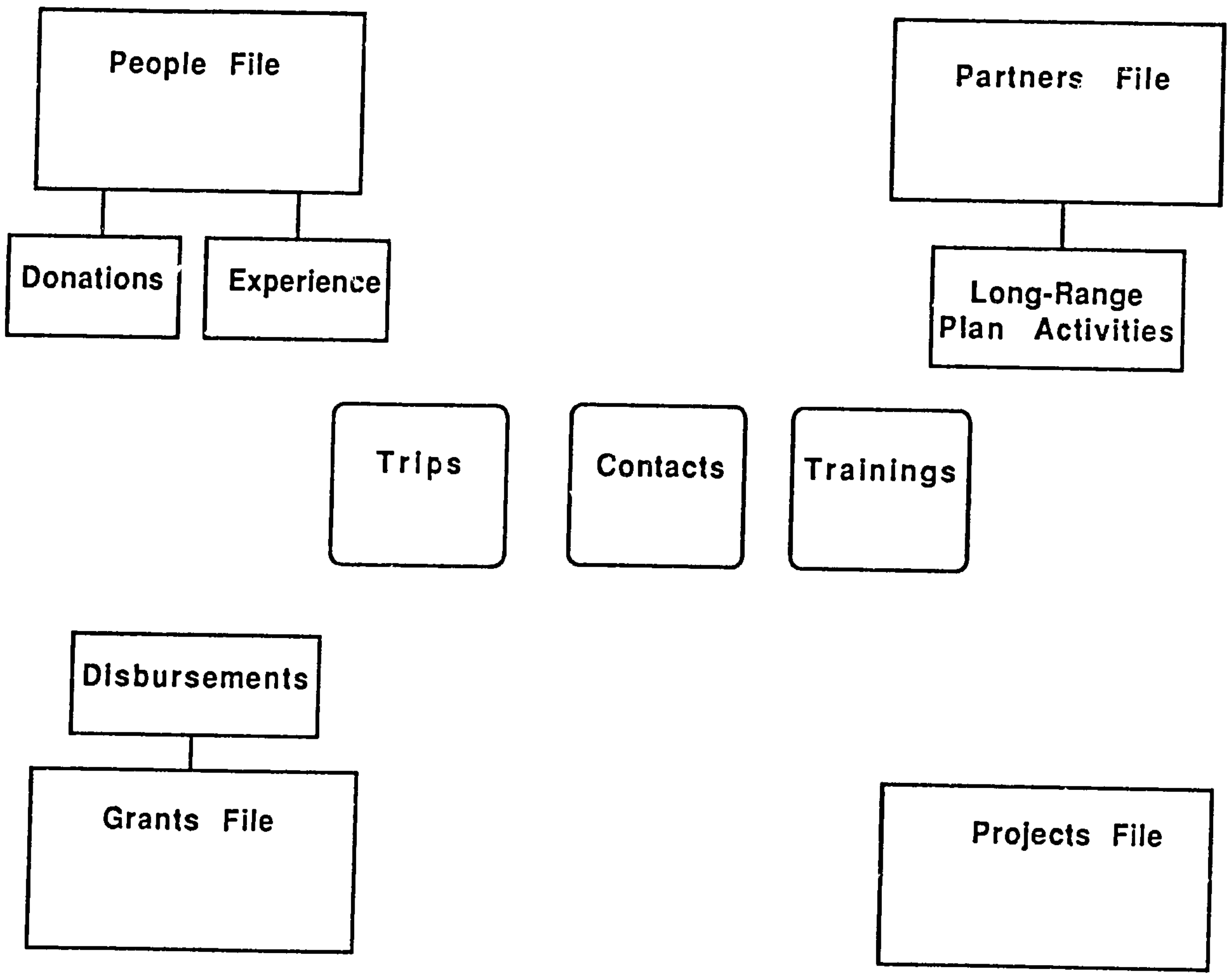
All of the information described in the previous section are organized into one, integrated *data base* structure. This structure has the feature of being able to link information collected from one source to that coming from any other source. A Partnership Representative, for example, can check on the current address of a Partnership Chair while handling a trip request or other matter. An evaluation can compare the target communities affected by projects funded by different kinds of funding sources, and so forth. A sample of capabilities which the system can achieve this year are:

- A listing of members that have a needed skill;
- Abstracts from reports and studies that provide "how to" information or provide documentation useful for publicity or funding purposes;

- The schedule of all pending trips and their purposes so that various activities could be coordinated and "piggy-backed" with them;
- The long-term objectives of the Partners, organized by type, so that joint ventures among the Partnerships can be arranged in mutually benefitting ways;
- The identification of Partnerships that are particularly succesful in obtaining gender and ethnic diversity among their members, so that others can learn from their experience;
- The names of contract trainers whose evaluations indicate special success with specific subject matters involving trainees of particular backgrounds;
- The pattern of financial giving by individuals so that appeals can be better crafted;
- The average number and type of contacts between NAPA Reps and the Partners so that work loads can be appropriately adjusted and underserved areas better addressed.

A diagram for this data base structure is presented below. The four "pillars" are the People, Partners, Projects and Grants files. Their subsidary files, which track transactions such as the donation from a person or a disbursement of a grant, are linked by solid lines. The three central files -- Trips, Contacts & Trainings -- contain links to all the files. In this structure, data from any file can be linked to data from any other file.

Data Base Diagram



Prototype Data Entry Screens

The data entry screens presented in this report in the Attachments section:

- Itemize all the data elements being gathered and organize them for easier data entry;
- Provide the "look and feel" of the proposed system; and,
- Indicate the level of effort facing the NAPA staff as they meet their daily information handling requirements.

I constructed an earlier version of these screens, building upon my one-on-one discussions with key NAPA staff. Those screens were then presented to nearly the full staff at their retreat in early January whee they worked in groups to go over those drafts, line by line. The screens offered here reflect their suggestions. Even this current rendering, however, requires further revisions, which will come as the monitoring and evaluation system is actually implemented. The recommenoed implementation schedule at the end of this report indicates how these additional changes will be made.

The various "system" screens are not illustrated here. They would include the screens for entering code tables (e.g., Country Code), the "help" screens which provide instructions for every data field and prompt, and the "popup" windows for jumping from one file to another. An exhaustive development of these screens for NAPA should occur in Phase Two.

The listing of screens in the Attachments section are as follows:

Screen	Attachment Page
People Registry	A-1
People-Donations	A-4
People-Experience	A-5
Partnership Registry	A-6
Partnership-Long Range Plan Activity	A-9
Projects	A-10
Grants Registry	A-14
Grants-Disbursements	A-15
Trip Request	A-16
Contact Log	A-20
Example Paper form for Partnership Rechartering	A-21

Implementation Plan - Phase Two

The implementation plan consists of a set of objectives, their schedule for implementation and a description of the resources required for each. Phase Two refers to the next twelve months, when the initial installation of the Cooperative Agreement requirments will be done. Phase Three then covers the remaining three years of the Cooperative Agreement, when these systems are fully incorporated into the day-to-day workings of NAPA and the Partnerships. This last phase is not further detailed here, as its full dimensions depend on the results of Phase Two.

The Objectives

When early drafts of the Phase Two implementation objectives were presented to NAPA, many staff were understandably wary about the ambitous nature of the work that was involved. There was general agreement on the sequencing of the work to be done, but considerable doubt existed about the ability to commit resources to accomplishing them all in a year's time.

In analysing these concerns, the following major obstacles are at issue:

- Can the funding be found to pay for the software development needed? The current Information Systems Manager has just resigned and a replacement is being sought.
- Will staff have the computer equipment required to provide access to this software? The NAPA computer network is faltering and it, too, will be replaced this year. About half of the staff also need replacement desk top computers.
- Can the staff find the time for the testing and training required for the new systems? Their time is already heavily commited and any monitoring and evaluation innovations must also bring producitivity gains that free-up more of their time.

The above concerns *have* been incorporated into the Phase Two objectives specified below, and in the scheduling which follows. I provide additional comment, where necessary, to indicate how these concerns are being addressed by the implementation plan.

The Phase Two plan has five objectives. They are listed below in the order of their unfolding, as they build upon one another.

- Create an "operational", computer-based system for the Cooperative Agreement requirements. By operational, it is meant that the systems work, but they may still require further refinements as staff adjust to them and computer equipment becomes available.
- Install this system onto NAPA's current computer hardware and extend its access to staff as NAPA continues to upgrade its systems with new and additional equipment.

- Enter "core" data to each of the described files. The amount of this data will be sufficient to fully test the software and enable those staff with access to adequate computer equipment to handle their Partnership interactions using this software.

- For those staff with the right computer equipment, train them to operate the software and support their use of it for their standard work procedures. (The experiences with these staff will scout the way for the remainder of the staff when their equipment comes on line).

- Begin testing and development of field-based, computer systems that permit information to be entered and accessed directly by the local Partnership committees.

The Schedule

NAPA and A.I.D. have agreed on the priorities for sequencing the NAPA-based implementation in 1992. Those activities which bear most importantly on the requirements of the Cooperative Agreement are the first to be handled. In brief, these priorities are:

1. The travel request thru final reporting process
2. The rechartering of Partnerships and related follow-up
3. The expansion of the information stored on people
4. The integration of the donation and grant information
5. The maintenance of in-depth information on project activity
6. The addition of systems to manage the various training components

The implementation schedule provided below identifies when major activities are begun and substantially completed for each of these priority areas. It should be noted, however, that elements of more that one priority are handled at a time because of their interrelationships. It is also assumed that revisions and improvements in these activities are ongoing tasks that are not limited only to the time frames specified.

A general staff meeting is recommended for October for the purposes of reviewing the progress to date and making adjustments to the implementation schedule. By that time, the delivery dates for new equipment and the staff training requirements will be known so as to predict the effort that still lies ahead.

March thru June

The focus is the full implementation of the travel related activities. This requires:

- The completion of the Trip Request screen and the training in its use by the first few Reps who have fully outfitted computers. By the end of June, these screens will be fully operational and a plan will be in place to extend their application to the remaining Reps.

- The completion of the People and Partnerships screens so that the data required from them for the Trip Requests can be accessed. By the end of June, the People file will also be populated with at least those individuals who are involved in the trips.

- The first-stage installation of the Projects file so that information on those projects with current trips can be handled. The full inclusion of all the data elements in the projects file will be completed over the course of the year as the Reps and Partnership officials work out the long range planning frameworks for the project activity.

- The completion of the coding tables for all code fields used in the travel process, such as country codes, trip type, skills and language codes, and target community type.

- The design and development of the initial reports needed to properly handle the trip requests and to monitor and assess this activity.

July

Attention will be on the People file and using the computer systems to increase productivity in contacts with the Partnerships. The specific objectives are:

- Completion of the entry of all People file information required for the Partnership Directory. The first inclusion of membership listings for Partnerships will also be attempted.

- Adding the information for special listsings, such as for the Fellows, Press, corporate supporters, and others will be the focus.

- Installation of Partnership Contact Log for those Reps with capable computers.

August thru September

These months address the granting and donation elements of the system, specifically:

- Completing the Grants file and its Small Grants Disbursements sub-file.

- Completing the People file's Donor sub-file and the entry of the first nine months of donation activity

- Adding to the Projects file the codings and related financial tracking elements.

- Exploring linkages to NAPA's existing accounting file information.

- Completing the initial reports and providing the associated training to NAPA staff.

October thru November

A Phase Two midpoint assessment and expansion of effort are made involving:

- Holding of a general staff workshop in October to review the overall progress of the monitoring and evaluation systems. The completion of the Projects file design will be one of the objectives of this workshop, as it represents an interweaving of almost all elements of the overall system.

- Conducting extensive staff training and support sessions to increase the number of staff using the system as equipment and tested systems become ready.

- Launching field tests of the systems by Partnerships with computers of their own.

December

This period will be concerned with the incorporation - or at least the linking - of any remaining, relevant data from other NAPA sources, such as the accounting files and the 20,000+ list of donor names now being maintained by an outside organization.

This time will also be used to put finishing touches on all of the files and screens and to prepare the system for receiving data directly from the Partnerships through disk swapping or electronic communications.

January and February

The focus will be on incorporating the various NAPA and Partnership-based training acitvities into the computer systems. It involves:

- Creating files and their data entry screens to identify training events and to register trainee information. These files will be linked to the rest of the computerized system so that demographic statistics on the trainees, for example, can be derived.

- Entering training data for the period begining January 1, 1993.

- Prototyping a software package which enables the contract trainers to enter this information directly on their own computers and to then send a computer disk with the information to NAPA.

Resource Requirements

NAPA is planning to make major investments in computer modernization for this year. In the next six months, there will be a sufficient number of staff with the needed equipment to test the new software and perform the tasks described in the implementation plan schedule. By the time of the recommended October general staff meeting, the delivery dates for any more equipment will be known so that the inclusion of the remaining staff in the system can be charted.

If the needed computer equipment for all staff cannot be purchased for some time, the placement of centrally accessable workstations, data entry by assigned clerical staff and other alternatives will still allow the Cooperative Agreement systems to be effective. The October workshop provides the forum for handling these contingencies.

The recent news of the imminent departure of NAPA's Information Systems Manager has the potential of throwing back the whole schedule until a replacement is on board. It also opens the possibility for obtaining a staff person, consultants, outside firm or combination of these resources that have the specific skills and aptitudes specifically geared for implementing the new systems.

Recommendations:

1. Use the salary slot for the vacating Information Management Specialist in the most creative way possible. If possible, hire a single person with the range of skills necessary. Consider also a contract with a firm that can provide this same coverage, using a team of people, at a comparable fee.

2. Seek additional monies for a software programmer. A minimum of 300 hours of development effort are required for the data base, entry screens and reports needed during Phase Two. It is highly unlikely that a single new staff person can handle this amount of software development while also becoming oriented to NAPA, overseeing the installation of new equipment and continuing the staff supports for existing software applications. Given that the new hire should be able to assume at least half of the new software development, approximately $5,000 in additional monies will be needed for programmer assistance.

3. Again, to avert delays because the new hire must spend time becoming acquainted with NAPA needs, an additional allotment of $3,000 to $5,000 for a consultant will help cover the design, testing and training requirements for the Cooperative Agreement systems.

Staff and Partners Participation in the Process

During the period of this consultantship, I also had responsibility for organizing and leading a full day of staff discourse on the monitoring and evaluation system at the January retreat. This proved to be an excellent opportunity for unfolding the proposed system and obtaining the full staff's assistance in refining it further. It had the additional benefit of achieving general staff acceptance of the effort so that their cooperation during the months ahead would be enhanced.

The day began with an explanation of the Cooperative Agreement requirements and the demands this placed on effective information gathering and analysis. I followed with a "primer" on how computer data bases are developed and demonstrated a prototype entry screen so that they could appreciate how it actually works, including the use of help screens and other user supports.

At midday, the staff broke into small groups where each took a critical look at a set of entry screens and made suggestions. They then presented their findings to the full session where additional comments were made. About half of the groups took the extra step of later typing out their recommendations and submitting them to me. This report includes the staff suggestions.

Recommendations:

1. Continue the staff participation during the implementation period by forming small committees for each of the six priority areas. They would advise on the screens, procedures and other aspects of the system as they are being finally developed. A small committee composed of the Cooperative Agreement Manager, the VP for Programs and the Information Systems Manager should oversight the whole process.

2. As mentioned, arrange for an all-staff workshop in October so that the staff can participate in the midpoint evaluation and help adjust the implementation plan.

3. Develop a written "fact sheet" on the implementation plans for the monitoring and evaluation system and circulate it among the Partnerships. Invite their comments and provide for a forum at NAPA gatherings where the system can be discussed. Care is necessary in the design and timing of this fact sheet so that the Partnerships understand how the system fits into the larger "Excellence" objectives.

4. Provide to the Partnerships example printouts, directories and other listings that demonstrate the potential of the enhanced system (e.g., in order of priority):

   - A regularly updated travelers schedule
   - A Projects Directory, fully indexed by topic, geography and travelers
   - A statistical profiling of donor and grant types
   - Skillsbank directories of Members

   By seeing the value of this information to them, the Partners cooperation in providing their information will be reinforced.

```
1234567890123456789012345678901234567890123456789012345678901234567890123456789O

                     People Registry - Screen #1
                   Primary Background Information

 ID# [    ]  Affiliation [      ]  [                             ]

 [     ]      [          ]   [          ]   [            ]   [      ]
 Prefix       First Name     Middle Name    Last Name        Suffix

 Mailing Address [                                                  ]
                 [                                                  ]
            City [              ] State [        ] Post Code [      ]

   Country Code [     ] [               ]        Home/Business? [  ]

 Home Phone [          ] Bus Phone [          ]  Fax [              ]

 Gender[ ] Birthdate[ | | ]Source [   ] [              ] Info Release?[ ]

 Occupation Code[   ] [                                             ]
 Professional Title   [                                             ]
 Organization Name    [                                             ]

 Reg Date [      ] Term Date[      ] Term Code[      ] Last Update [      ]
```

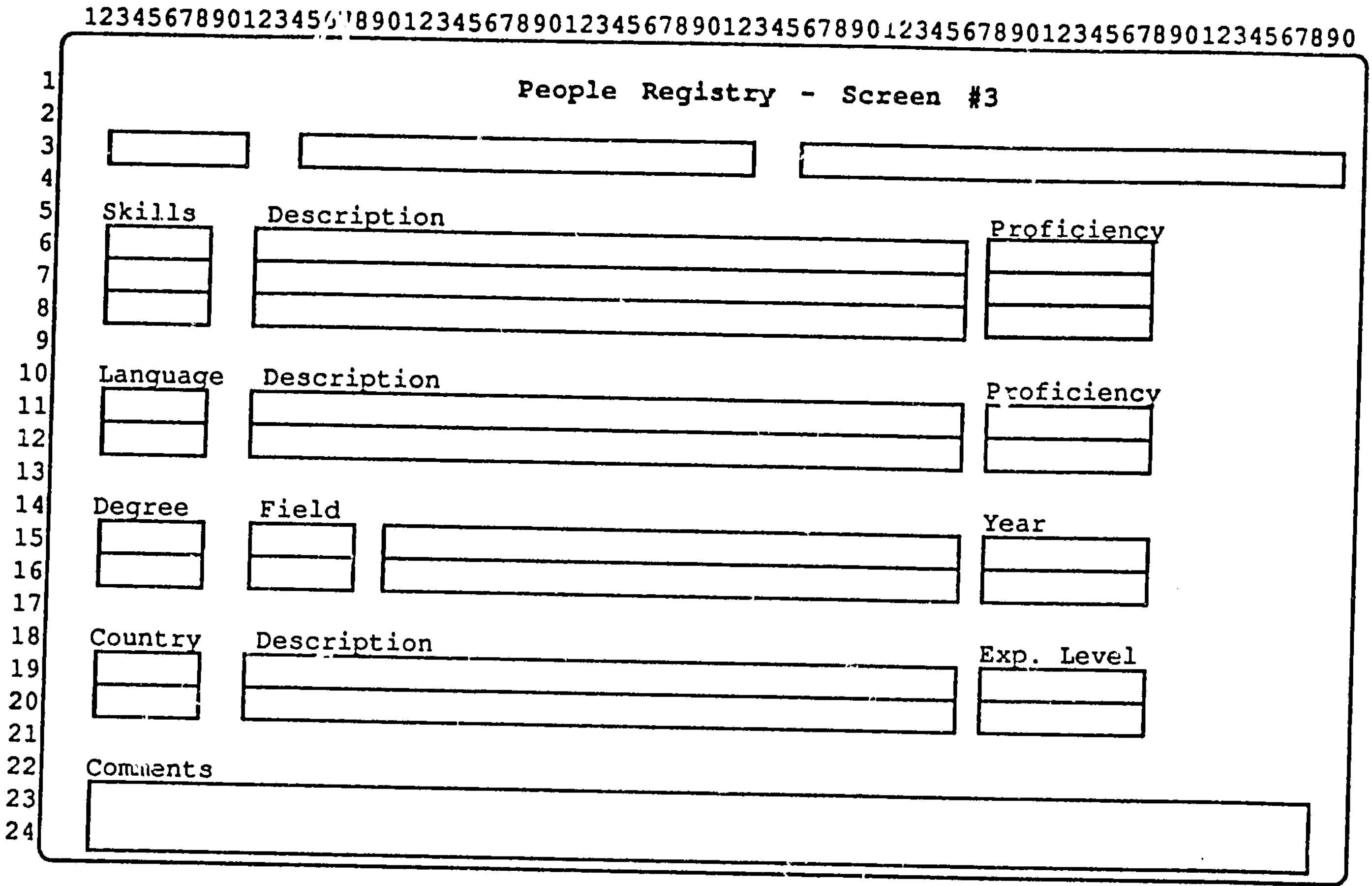
ID# - This is a sequential number that is automatically assigned by the computer. When updating an existing person, the ID# is used to bring up the person's information. If the ID# is not known, a fast name search is done via the F2 key.
Affiliation - A code for the Partnership, NAPA staff, or other designation. An F2 provides a popup with selection options. The text description for it is displayed in the field box to the right.
Name fields - These four parts of the name are for the primary name. The next screen offers additional naming options, including various salutations and maternals.
Mailing Address - Two lines are provided for the street, department or other mailing label part.
City - The city for this mailing address.
State - The state, district or other country division. For U.S., the state postal code is used.
Post Code - The zip code (up to 10 digits and dash) or other country postal code.
Country code - Press F2 for listing. When entered, the full country name appears to the right.
Home/Business? - "H" indicates that this is home address; "B" that it is the business address.
Phone fields - The full telephone numbers are entered for each type of phone.
Gender - "M" for Male, "F" for female.
Birthdate - The full day/month/year is given, if known. An option is to enter only the birth year.
Source - The code indicating how person beacme known; text description then appears to right. An F2 popup gives list of choices.
Info Release? - If "Y", person gives permission to release names for directories, etc.
Occupation Code - Indicates person's occupational category; text then appears to right. An F2 popup gives list of choices.
Professional Title - The title that would appear on a mailing label for this person.
Organization Name - The organization that would appear on a mailing label.
Reg Date - Date that the person was first registered with NAPA.
Term Date - Date that the person was deactivated.
Term Code - Reason for the termination.
Last Update - The system automatically enters the last date when any information was entered or changed on this person's record.

```
12345678901234567890123456789012345678901234567890123456789012345678901234567890

                People Registry - Screen #2
          Secondary Contact Information & Codes

 Personal Salutation [          ]    SP Salutation [          ]
  Solicit Salutation [          ]     Alter. FName [          ]
Secondary Address [                                            ]
                  [                                            ]
             City [          ]     [State    ]  Post Code [     ]
     Country Code [   ] [          ]        Home/Business? [  ]
 Solicitation Codes [   ] [                  ]
                    [   ] [                  ]
                    [   ] [                  ]
 Comm. Involvement  [   ] [                  ]
                    [   ] [                  ]
                    [   ] [                  ]
 Social Security # [        ]  Spouse ID [   ] [            ]
```

Top Row of Field Boxes - The person's ID#, full name, affiliation are automatically carried over from the first entry screen.
Personal Salutation - The salutation used for personal letters.
SP Salutation - The Spanish or Portuguese salutation used for letters.
Solicit Salutation - The salutation used for fund raising letters.
Alter. FName - An alternative first name used as preferred.
Secondary Address - Two lines are provided for the street, department or other mailing label part for this secondary address.
City - The city for this mailing address.
State - The state, district or other country division. For U.S., the state postal code is used.
Post Code - The zip code (up to 10 digits and dash) or other country postal code.
Country code - Press F2 for listing. When entered, the full country name appears to the right.
Home/Business? - "H" indicates that this is home address; "B" that it is the business address.
Solicitation Codes - Categorizes the solicitation possibilities for this person. An F2 popup gives choices. The three displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.
Comm. Involvement - Categorizes the institutional roles of the person. An F2 popup gives choices. The three displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.
Social Security # - Optional for employees, consultants, travelers and others who require this number for accounting purposes.
Spouse ID - If person has a spouse on file, enter the ID here. F2 gives listing. The full name is then displayed to the right.



Top Row of Field Boxes - The person'sID#, full name, affiliation are automatically carried over from the first entry screen.

Skills Codes - Categorizes the skills for this person. An F2 popup gives choices. The four displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.

Skills Proficiency - Each of the skills can be ranked on a 1-2-3 scale, with the "3" being the highest.

Language Codes - Categorizes the languages for this person. An F2 popup gives choices. The three displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.

Language Proficiency - Each of the languages can be ranked on a 1-2-3 scale, with the "3" being the highest.

Degree - MA, Ph.D, etc. The two displayed lines scroll up to allow for an unlimited number of degree codes.

Field - Code for field of study, e.g., AG. The text description (e.g., Agriculture) is then displayed to the right. An F2 popup gives a selection list.

Year - The year the degree on that line was received.

Country - The code for the country (could also include section of country) where the person has previous experience. An F2 popup gives selection choices. The text description is then displayed at the right. The two displayed lines scroll up to allow for an unlimited number of codes.

Exp. Level - A 1-2-3 ranking of the experience with a "3" being the highest.

Comments - Use to elaborate on the person's background.

People Experience Log

Person ID [ ] [ ] [ ]

Position Code [ ] [ ]

Start Date [ ] End Date [ ] Last Update [ ]

Status Code [ ] [ ]

Comments

[ ]

NOTE: One of these screens is completed for <u>each</u> position that a person holds.

Person ID - Used to link this file to "parent" People File record. If the ID# is not known, a fast name search is done via the F2 key. When entered the person's name and affiliation are displayed in the field boxes to the right.

Position Code - Press F2 for selection list. Includes Partnership Executive Director, etc. The text displays in the field box to the right.

Start Date - The date the person started the position.

End Date - The date the person left the position.

Last Update - The system automatically enters the last date when any information was entered or changed on this person's record.

Status Code - A code categorizing the quality of performance of the person in this position.

Comments - A text field for describing the person's experience in this position in more detail. The text automatically wordwraps and allows for paragraph structure. The text scrolls up to accommodate an unlimited amount of lines.

People Donation Log

Person ID

Campaign Code

Donation Date | Type

Amount/Value | Pledge Received Date

Description/Comments

NOTE: One of these screens is completed for <u>each</u> donation that a person makes.

Person ID - Used to link this file to "parent" People File record. If the ID# is not known, a fast name search is done via the F2 key. When entered the person's name and affiliation are displayed in the field ooxes to the right.

Campaign Code - Press F2 for selection list of national mailings, etc. The text displays in the field box to the right.

Donation Date - The date the person made the donation or pledge.

Type - Press F2 for selection list that includes cash, plege, in-kind, matching, etc. Text description then displayes to the right.

Amount/Value - The US$ amount of a cash gift or its dollar equivalency for in-kind donations.

Pledge Received Date - Used when the donation is a pledge.

Comments - A text field for describing the donation in more detail. The text automatically wordwraps and allows for paragraph structure. The text scrolls up to accommodate an unlimited amount of lines.

```
12345678901234567890123456789012345678901234567890123456789012345678901234567890

                       Partnership Registry  -  Screen #1

  Partner ID [    ] Name [                                          ] N/S [ ]
                  S/P Name [                                                  ]
  NAPA Rep. [   ] [               ] Reg. Rep. [   ] [                         ]

  Mailing Address [                                             ]
                  [                                             ]
            City [              ] State/Dis.[           ] PostCode[          ]

     Country Code [      ] [                   ] Telephone [                 ]
                                                    TELEX [                  ]
  Office Type [ ] [                        ]          Fax [                  ]
 President Id [ ] [                        ]
  Director Id [ ] [                        ] Type [  ] [                     ]

  Found. Date [        ]  Last Update [         ]   Archive Year [      ]

  Members [      ]   Women Percent [    ]   Minority Percent [    ]

  Tax Exempt Status [      ]  Annual Tax Filing? [ ]  Fundraising Committee? [ ]

  Fundraising Needs Specified? [ ]    Money Raised [        ]
```

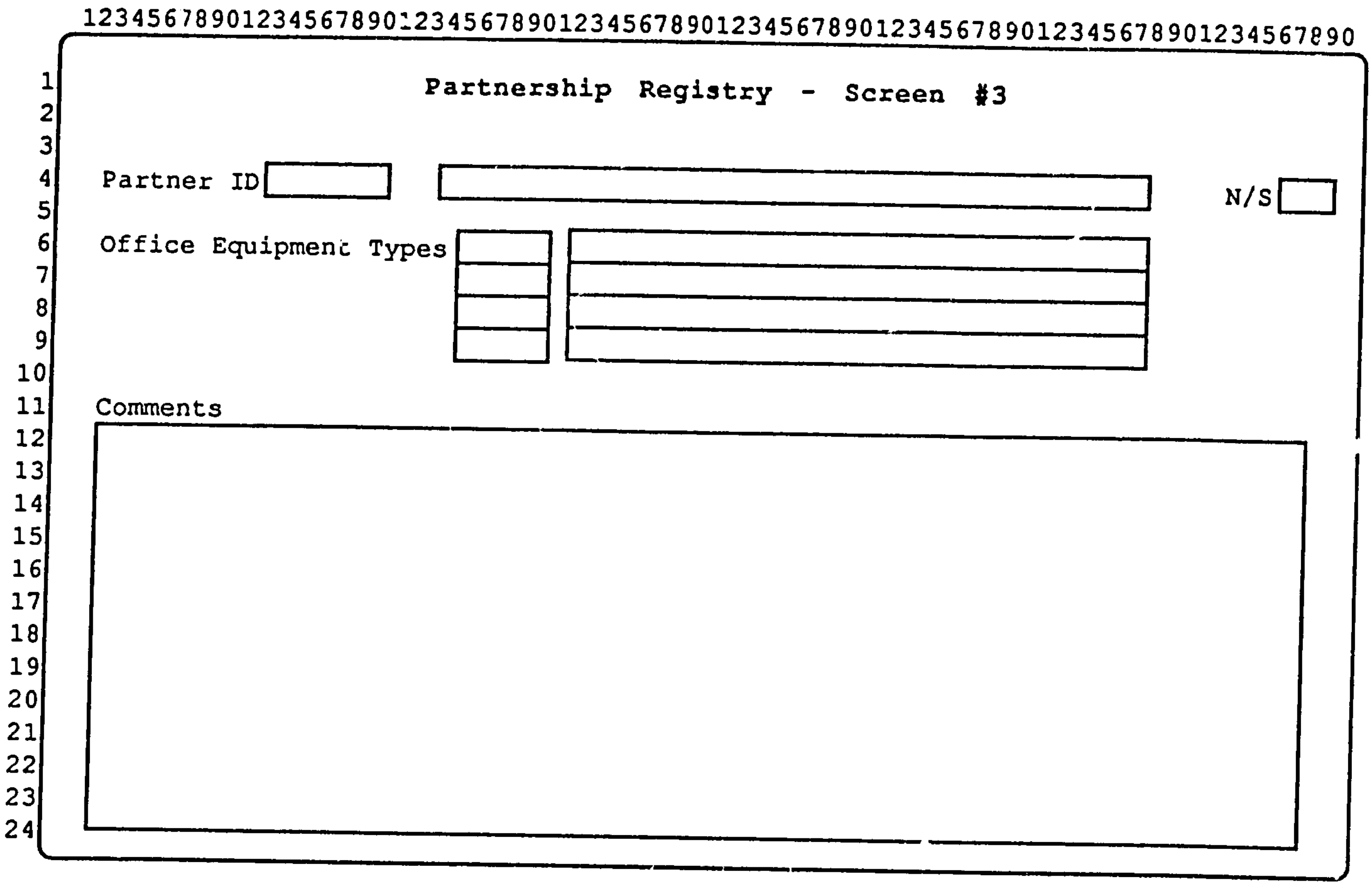
Partner ID - The ID for the Partnership. When updating a record, F2 provides selection options.
Name - The English text for the full Partner name is entered here.
S/P Name - The Spanish or Portuguese text for the full Partner name is entered here.
N/S - Type "N" if this record is for the North Committee, "S" if it is for the South Committee.
NAPA Rep. - The ID for the NAPA Rep. F2 gives list to select from.
Reg. Rep. - The ID for the Regional Rep. F2 gives list to select from.
Mailing Address - Two lines are provided for the street, department or other mailing label part.
City - The city for this mailing address.
State/Dist. - The state, district or other country division. For U.S., the state postal code is used.
Post Code - The zip code (up to 10 digits and dash) or other country postal code.
Country code - Press F2 for listing. When entered, the full country name appears to the right.
Office Type - The office type (e.g. "I" for "Independent"). The descriptive text is displayed.
Telephone - The full telephone number for the office.
TELEX - The full dial-up number for the TELEX.
Fax - The full telephone number for the fax line.
President & Director ID - The ID#s for the President's and the Director's record in the People File. Their names are then displayed in the field box to the right. An F2 does a name search.
Type - The type of Director position (e.g. "F" for "Full-time"). The text description is then displayed in the field box to the right.
Found. Date - The founding date for this Partnership.
Last Update - The system automatically enters the last date when any information was changed.
Archive Year - The year this record is stored for later reference.
Members - The number of members for this Partnership.
Women Percent - The percentage of members that are women.
Minority Percent - The percentage of members that are minorities.
Tax Exempt Status - The U.S. tax exempt status, e.g. 501c3.
Annual Filing Date?, **Fundraising Committee**, and **Fundraising Needs Specified?** are answered with "Y" or "N".
Money Raised - The US$ value of money raised.

12345678901234567890123456789012345678901234567890123456789012345678901234567890

Partnership Registry - Screen #2

Partner ID	[ ]	[ ]		N/S	[ ]
Membership Committee	[ ]	Volunteer Orientation	[ ]	Newsletter	[ ]
Min. Member Meetings	[ ]	Gen. Vol. Orientation	[ ]	Minutes Dist.	[ ]
Member's Manual	[ ]	Pretravel Orientation	[ ]	Meeting Notices	[ ]
President Elect	[ ]	Project Dev. Training	[ ]	Info. Brochure	[ ]
Staggered Terms	[ ]	Awards/Recognition	[ ]	N/S Communicate	[ ]
Annual Report	[ ]	Annual Plan-Both Sides	[ ]	Exchanges No.	[ ]
SubCommittee Reports	[ ]	S/M/L Plan Objectives	[ ]	Committees No.	[ ]
Implementation Sched	[ ]	Impact Evaluation Plan	[ ]		
Annual Meeting Date	[ ]	Term Start Date	[ ]	End Date	[ ]
Committee Types	[ ]	[ ]			
Inst. Involvements	[ ]	[ ]			

Partner ID, Name and **N/S** are carried over from the first screen.
Membership Committee to Impact Evaluation Plan - All answered with "Y" or "N".
Exchanges No. and **Committees No.** - Both numbers are automatically calculated by the computer using the Trip Request file for Exchanges and the Long Range Plan sub-file for the Committees.
Annual Meeting Date - Date of this Committee's Annual Meeting
Term Start Date - Date the term for the President and other officers begins.
Term End Date - Date the term for the President and other officers ends.
Committee Types - Categorizes the committees setup by the Partnership. An F2 popup gives choices. The four displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.
Inst. Involvements - Categorizes the local institutions involved with the Partnership. An F2 popup gives choices. The three displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.



Partner ID, Name and **N/S** are carried over from the first screen.

Office Equipment Types - Categorizes the major office equipment used by the Partnership. An F2 popup gives choices. The four displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.

Comments - A text field for describing the Partnership in greater detail. The text automatically wordwraps and allows for paragraph structure. The text scrolls up to accommodate an unlimited amount of lines.

```
1234567890123456789012345678901234567890123456789012345678901234567890

                 Partnership  Long-Range  Plan  Activity

 Activity No.[      ]

 Partner ID[      ]   [                                        ]  N/S [  ]

 Activity Code [     ] [                                                  ]

 Program Committee [     ] [                                         ]

 As of Date[         ]

 Description of Activity
 [                                                                      ]
```

Activity No. - This is a sequential number that is automatically assigned by the computer. A new activity record is created for each activity of each Partnership.

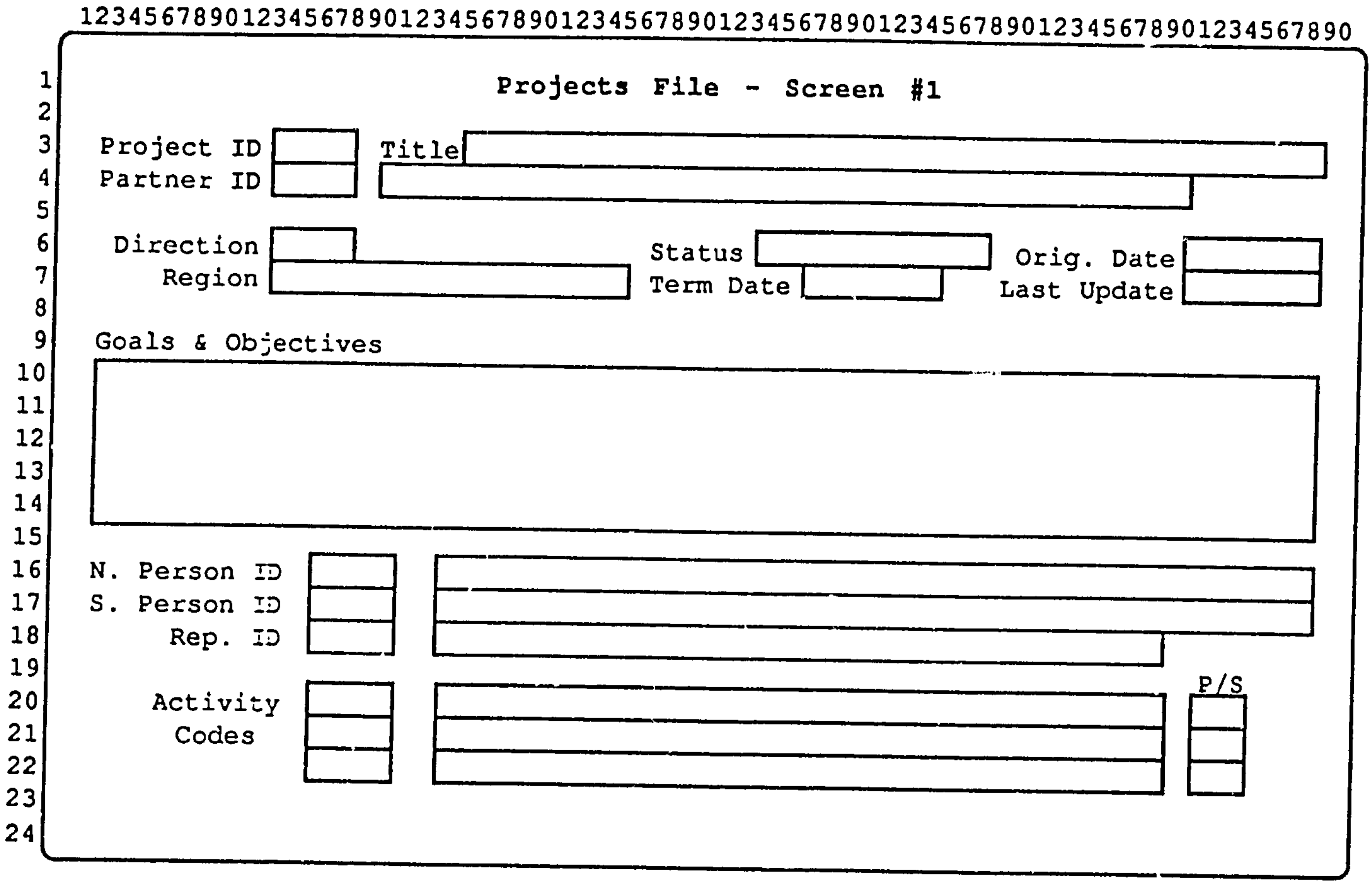
Partner ID, Name and N/S are carried over from the first screen.

Activity Code - Categorization of the activity. F2 popup lists options.

Program Committee - Partnership committee or subcommitttee that has oversight for this activity.

As of Date - The last update for this part of the long-range plan.

Description of Activity - A text field for describing the activity in greater detail. The text automatically wordwraps and allows for paragraph structure. The text scrolls up to accommodate an unlimited amount of lines.



Project ID - A sequential number that is automatically assigned by the computer. When updating an existing project, the ID# is used to bring up its information. If the ID# is not known, a fast project title search is done via the F2 key.

Title - The full name of the project.

Partner ID - An F2 provides a popup with selection options. The text description for it is displayed in the field box to the right.

Direction - "S" for activity going south; "N" for it going north.

Status - The current status for the project. F2 gives selection options.

Orig Date - The start date for the project.

Region - The geographical region where the activity is occuring. Press F2 to select from options.

Term Date - Date that the project was deactivated.

Last Update - The system automatically enters the last date when any information was changed.

Goals & Objectives - A text field for describing the project in more detail. The text wordwraps and allows for paragraph structure. It scrolls up to accommodate an unlimited amount of lines.

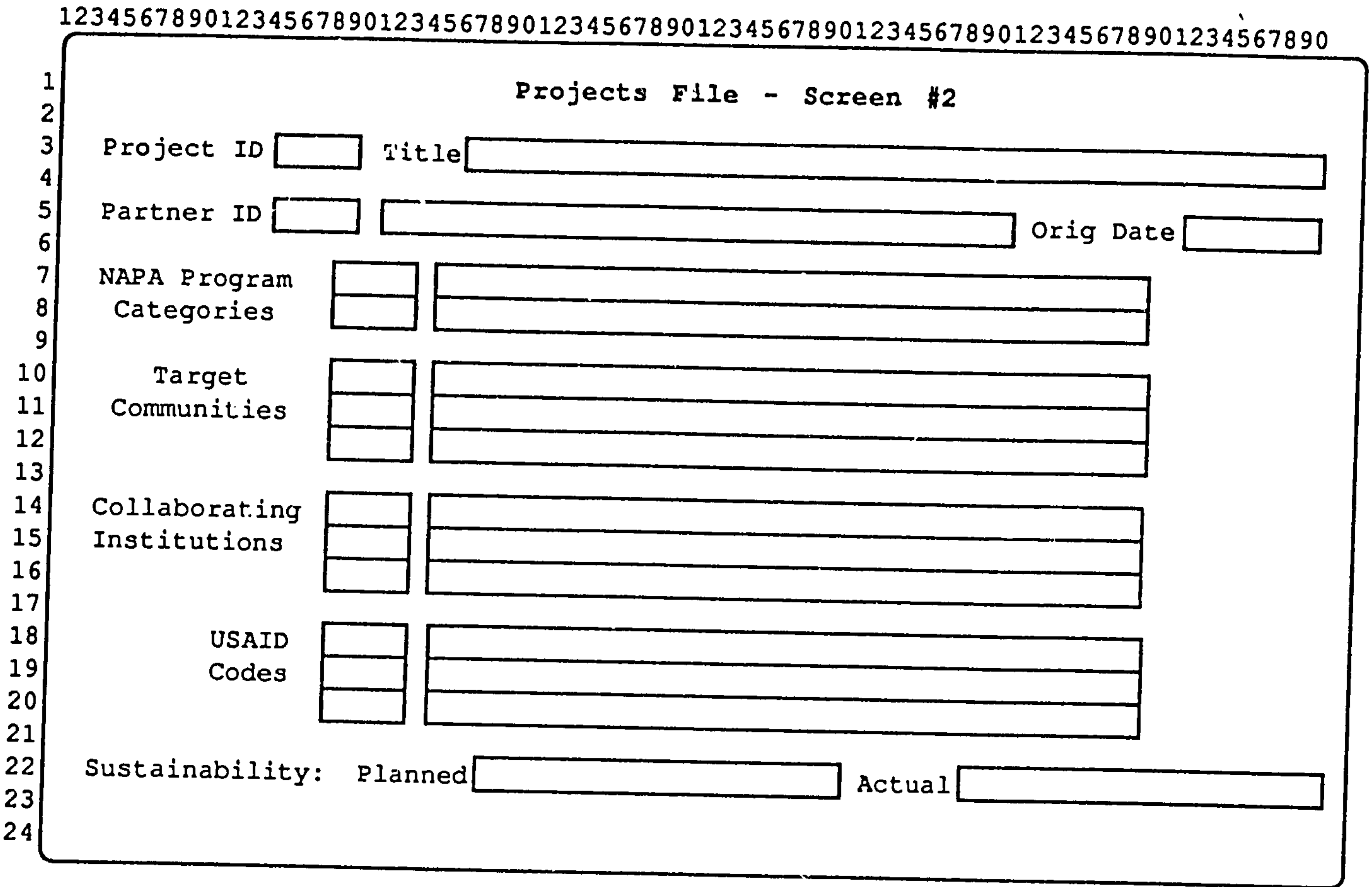
N. Person ID - Enter the Northern contact person. An F2 provides name search help. When entered, the name and contact information for the person is displayed in field box to the right.

S. Person ID. - Enter the Southern contact person. An F2 provides name search help. When entered, the name and contact information for the person is displayed in field box to the right.

Rep. ID - Enter the NAPA Rep for this project. An F2 provides name search help. When entered, the name and contact information for the person is displayed in field box to the right.

Activity Codes - Identifies the Partner's long-range planning activities for this project. An F2 popup gives choices. The three displayed lines scroll up to allow for an unlimited number of codes, one to a line. The text description is then displayed in the field box to its right.

P/S - For each activity code, designate whether it is a Prime or Secondary activity.



Project ID, Title, Partner ID, Partner Name, & Orig Date are all carried over from the first screen.

NAPA Program Categories - Examples, "Agriculture", "Health". An F2 popup gives choices. The two displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.

Target Communities - Categorizes the recipients for this project. An F2 popup gives choices. The three displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.

Collaborating Institutions - Categorizes those participating in this project. F2 popup gives choices. The three displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.

USAID Activity Codes - Identifies USAID's long-range planning activities involved in this project. An F2 popup gives choices. The three displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right. A P/S level is also assigned for each.

Sustainability: Planned - Categorizes the planned level of sustainability for this project. F2 popup gives choices.

Actual - Categorizes the actual level of sustainability for this project. F2 popup gives choices.

24

Projects File - Screen #3

Project ID [ ] Title [ ]

Partner ID [ ] [ ] Orig Date [ ]

Required Skills Description Role Level

In-Kind Resource Description Role Level

Financial Requirement [ ]

Committed to Date [ ]

Project ID, Title, Partner ID, Partner Name, & Orig Date are all carried over from the first screen.

Required Skills Codes - Identifies the skills needed for the project. An F2 popup gives choices. The five displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.

Role - For each skill, its required role is categorized (e.g., "Traveler", "Correspondent").

Level - Ranks the level of required skill on a 1-2-3 scale, with "3" being highest.

In-kind Resource - Identifies the in-kind resources needed for the project. An F2 popup gives choices. The five displayed lines scroll up to allow for an unlimited number of codes, one to a line. When code is entered, the text description for it is displayed in the field box to its right.

Role - For each resource, its required role is categorized (e.g., "Donation", "Loan").

Level - Ranks the quality of required resource on a 1-2-3 scale, with "3" being highest.

Financial Requirement - Gives the total US$ requirements from all sources. Actual entry of donations, contracts, etc. are done in Financial Activity File.

Committed to Date - Automatically computed from records in Financial Activity File.

Projects File - Screen #4

Project ID [ ] Title [ ]

Partner ID [ ] [ ] Orig Date [ ]

Project Results:

No.	Description	Plan. Number	Actual Number	Fem. Perc.

Prior Project Link ID [ ] [ ]

Post Project Link ID [ ] [ ]

Comments

Project ID, Title, Partner ID, Partner Name, & Orig Date are all carried over from the first screen.

No. - The first project result listed will be "1", the next "2", etc.

Description - The results are described in this space. The text scrolls left to accommodate more words (example: "Training farmers in tree planting"). The five displayed lines scroll up to allow for an unlimited number of EOPS. One EOPS is described per line.

Plan. Number - The planned number of people, items, etc. impacted by this activity (e.g. "24" for twenty-four farmers trained).

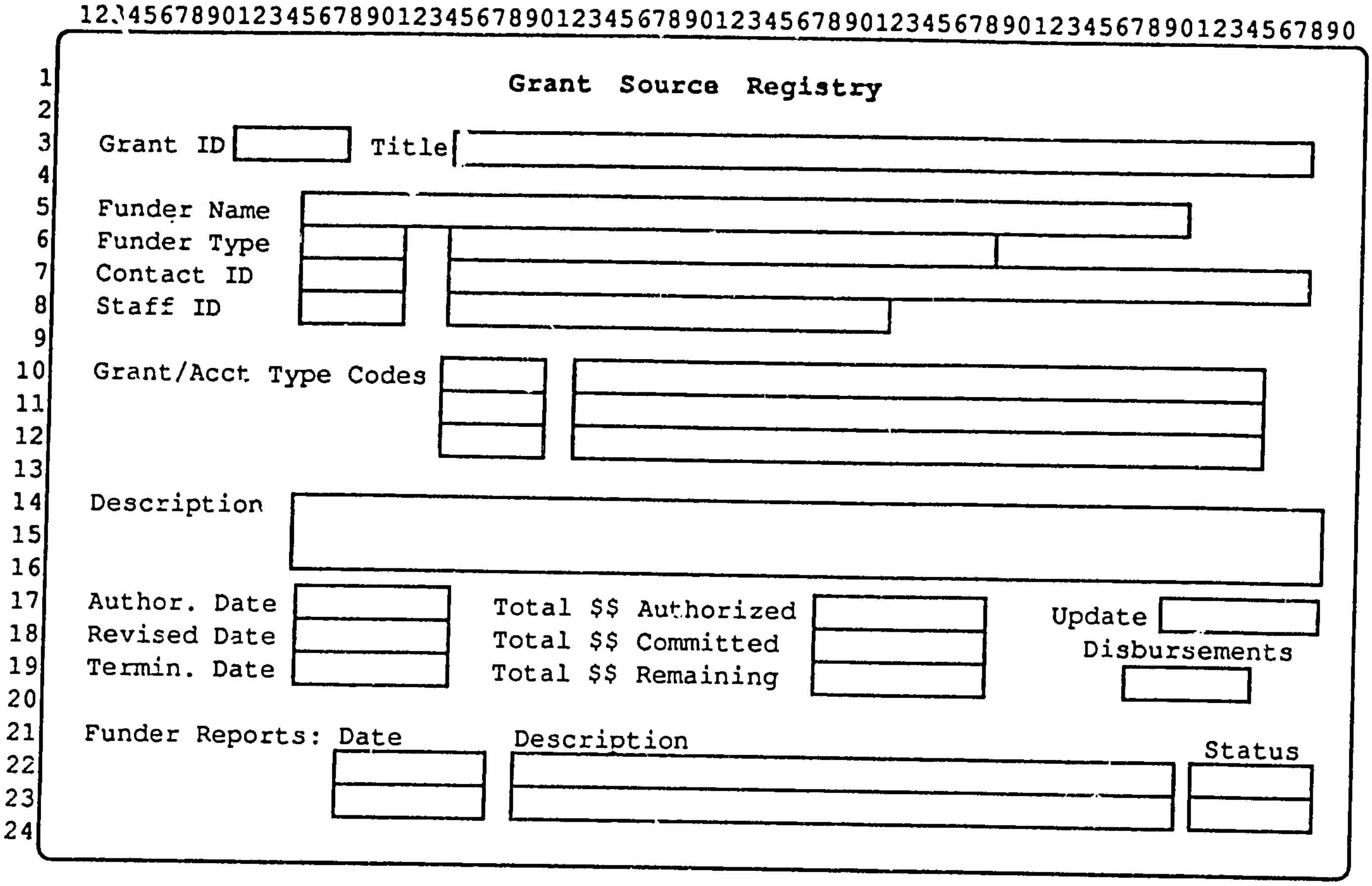
Actual Number - The actual number for this activity.

Fem. Perc. - The percentage of the actual number impacted that were women.

Prior Project Link ID - The ID number for a project which was the precursor to this one (if any). The title for the project is then displayed to the right.

Post Project Link ID - The ID number for a project which follows this one (if any). The title for the project is then displayed to the right.

Comments - An elaboration on the project results, needs for for activity, the link to a follow-on project, etc. This is a text field that automatically wordwraps and allows for paragraph structure. The text scrolls up to accommodate an unlimited amount of lines.



Grant ID - A sequential number that is automatically assigned by the computer. When updating an existing grant, the ID# is used to bring up its information. If the ID# is not known, a fast search by Title is done via the F2 key.

Title - The full name of the grant.

Funder Name - The name of the government agency, foundation or other provider of the grant.

Funder Type - A categorization of the funder. An F2 gives selection options. The text description displays to the right.

Contact ID - Enter the ID# of the contact person at the funding organization. An F2 provides name search help. When entered, the full name and title are displayed to the right.

Staff ID - Enter the ID# of the NAPA staff person overseeing the grant. An F2 provides name search help. When entered, the full name is displayed to the right.

Grant/Acct Codes - Categorizes the grant in several ways, e.g., whether it is part of a revolving loan fund, its program areas and its NAPA fund accoounting codes. An F2 popup gives choices. The three displayed lines scroll up to allow for an unlimited number of codes, one to a line. When the code is entered, the text description for it is displayed in the field box to its right.

Description - A text field for describing the grant. The text automatically wordwraps and allows for paragraph structure. The text scrolls up to accommodate an unlimited amount of lines.

Author., Revised & Termin. Dates - The dates when the grant was originally authorized, when it was *last* revised and when it was terminated.

Total $$ Authorized, Committed & Remaining - The dollar amounts for each.

Update - The system automatically enters the last date any information was changed on this screen.

Disbursements Number - This number of disbursements is automatically computed from the dispursements screens.

Funder Reports Date, Description & Status - For each report due the funder, its date, a text description and the current status (e.g., "completed") are entered here.

Grant Disbursement Log

Grant ID [ ] Title [ ]

Date Approved [ ] Date cf check [ ]

Project ID [ ] [ ]
[ ]

Amount Dispersed [ ] Amount Matched [ ]

Interim Report: Due Date [ ] Received Date [ ]

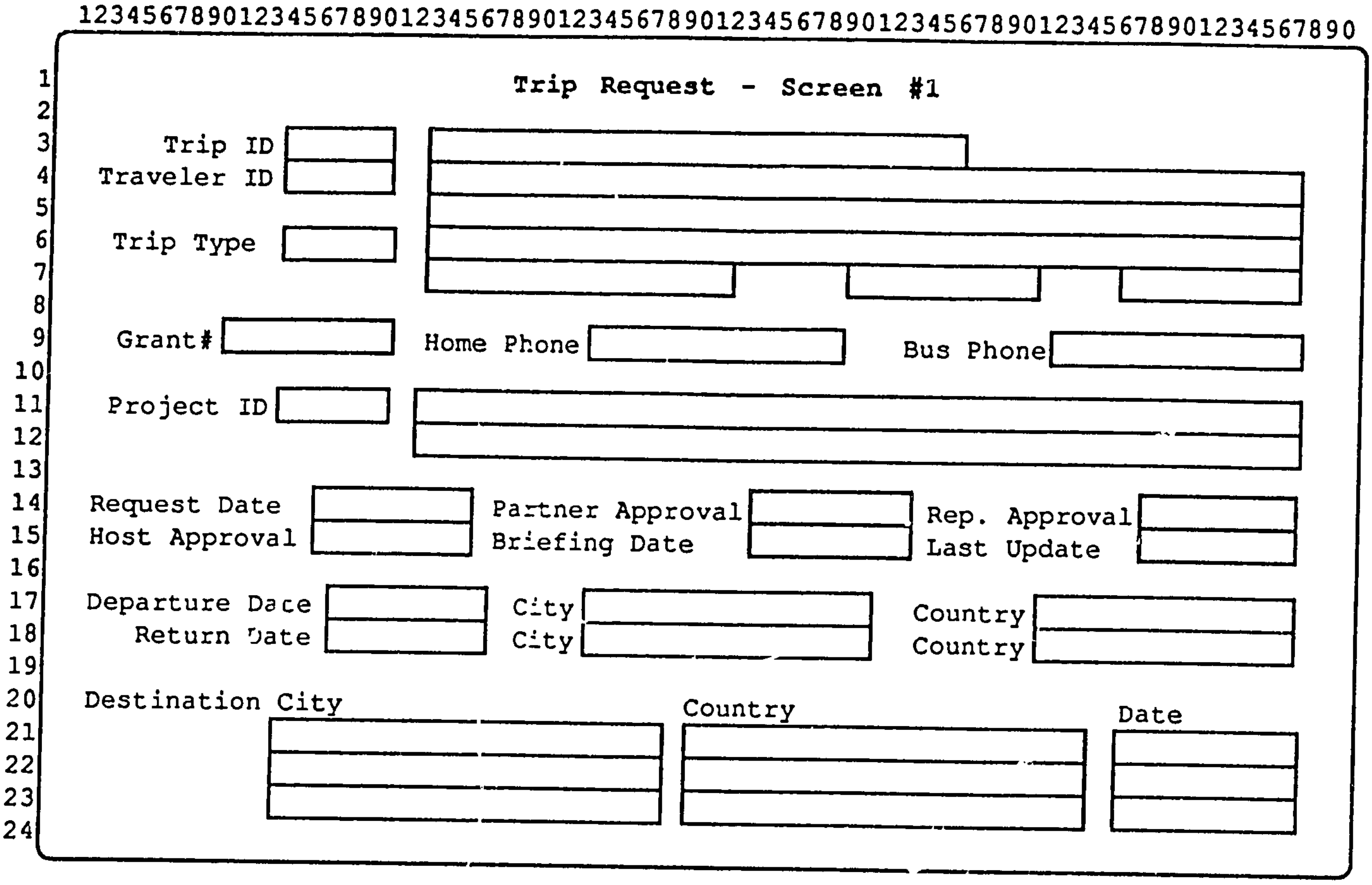
Final Report: Due Date [ ] Received Date [ ]

Follow-up Date [ ] Reason [ ]

Comments
[ ]

NOTE: One of these screens is completed for each disbursement.

Grant ID - Used to link this file to the "parent" Grants file record. If the ID# is not known, a fast search by Title is done via the F2 key.
Title - The full name of the grant is automatically displayed when the Grant ID is entered.
Date Approved - The approval date for the disbursement.
Date of check - The date the check was sent to the recipient.
Project ID - The ID# for the project receiving the check. When entered, the project name and Partnership name are automatically displayed.
Amount Disbursed - The dollar amount of the check.
Amount Matched - The dollar amount of any matching funds made by the project.
Interim Report Due & Received Dates - The dates involved for the interim report.
Final Report Due & Received Dates - The dates involved for the final report.
Follow-up Date & Reason - The date and describe the reason for the follow-up.
Comments - A text field for commenting on the disbursement. The text automatically wordwraps and allows for paragraph structure. The text scrolls up to accommodate an unlimited amount of lines.



Trip# - This is a sequential number that is automatically assigned by the computer.

Traveler ID - The ID# from the People File is entered; an F2 lists names if needed. When entered, the person's name is displayed in the top field box to the right. In the four lines of boxes below that the full address and telephone numbers are defaulted from the People File. The user can enter a different address and have it replace, or not replace, the one in the People File.

Trip Type - A categorization, such as "VC for "Volunteer Consultancy".

Grant# - The ID number for the grant funding the trip. An F2 popup gives selections.

Project ID - The ID# from the Projects File is entered; an F2 lists project titles if needed. When entered, the title is displayed in the box to the right and the Partnership in the box below.

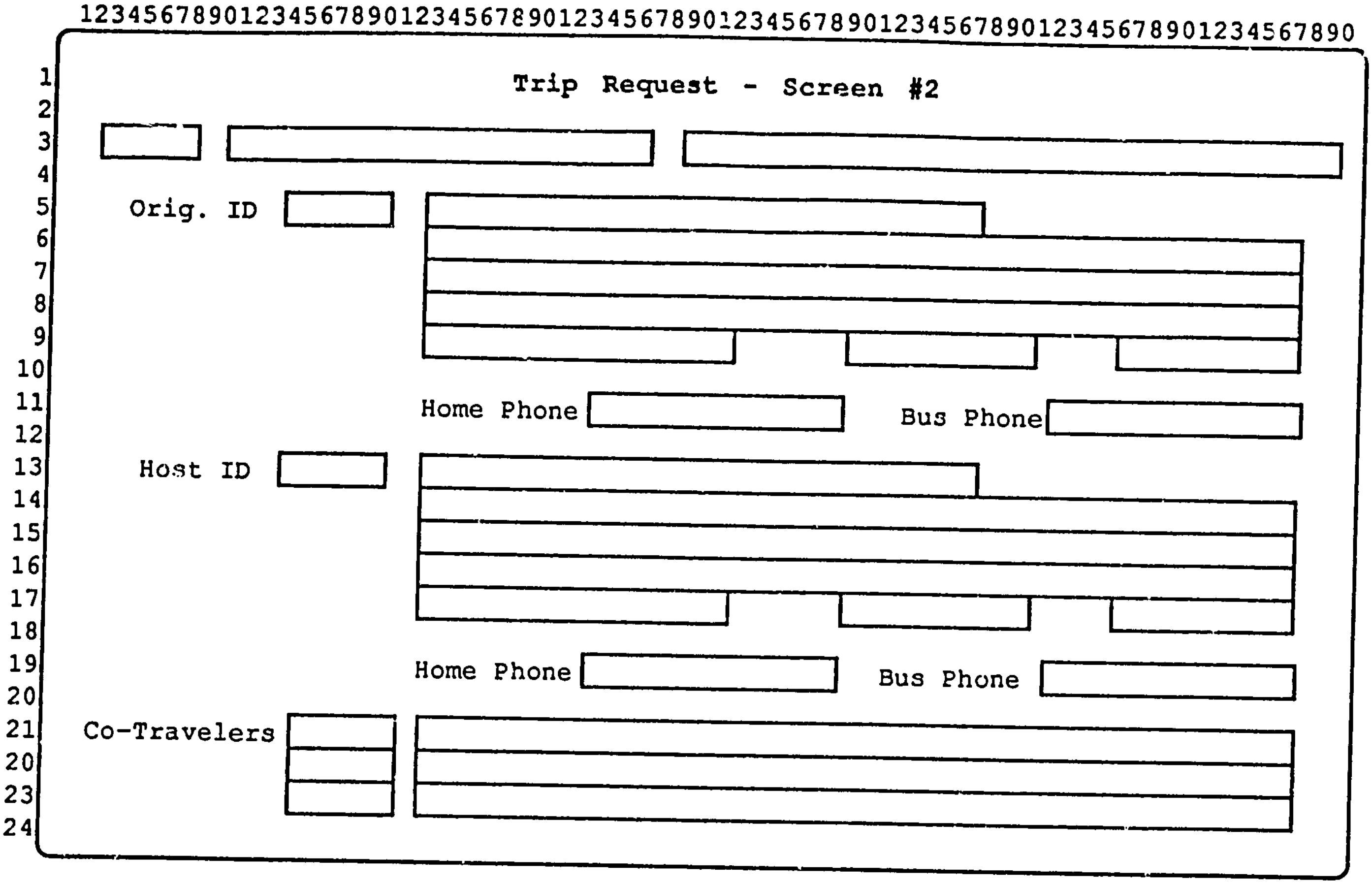
Request Date, Partner Approval, Rep. Approval, Host Approval & Briefing Date - These are the dates involved in this trip.

Last Update - The system automatically enters the last date when any information was entered or changed on this trip request record.

Departure Date, City & Country - Gives trip's starting point.

Return Date, City & Country - Gives trip's ending point.

Destination City, Country & Date- Enter only the trip stops that are destinations for service, entering the city, country and dates for each in the order travelled. The ticketing staff will use this information to prepare the trip itinerary. Lines scroll up to include as many destinations as needed.

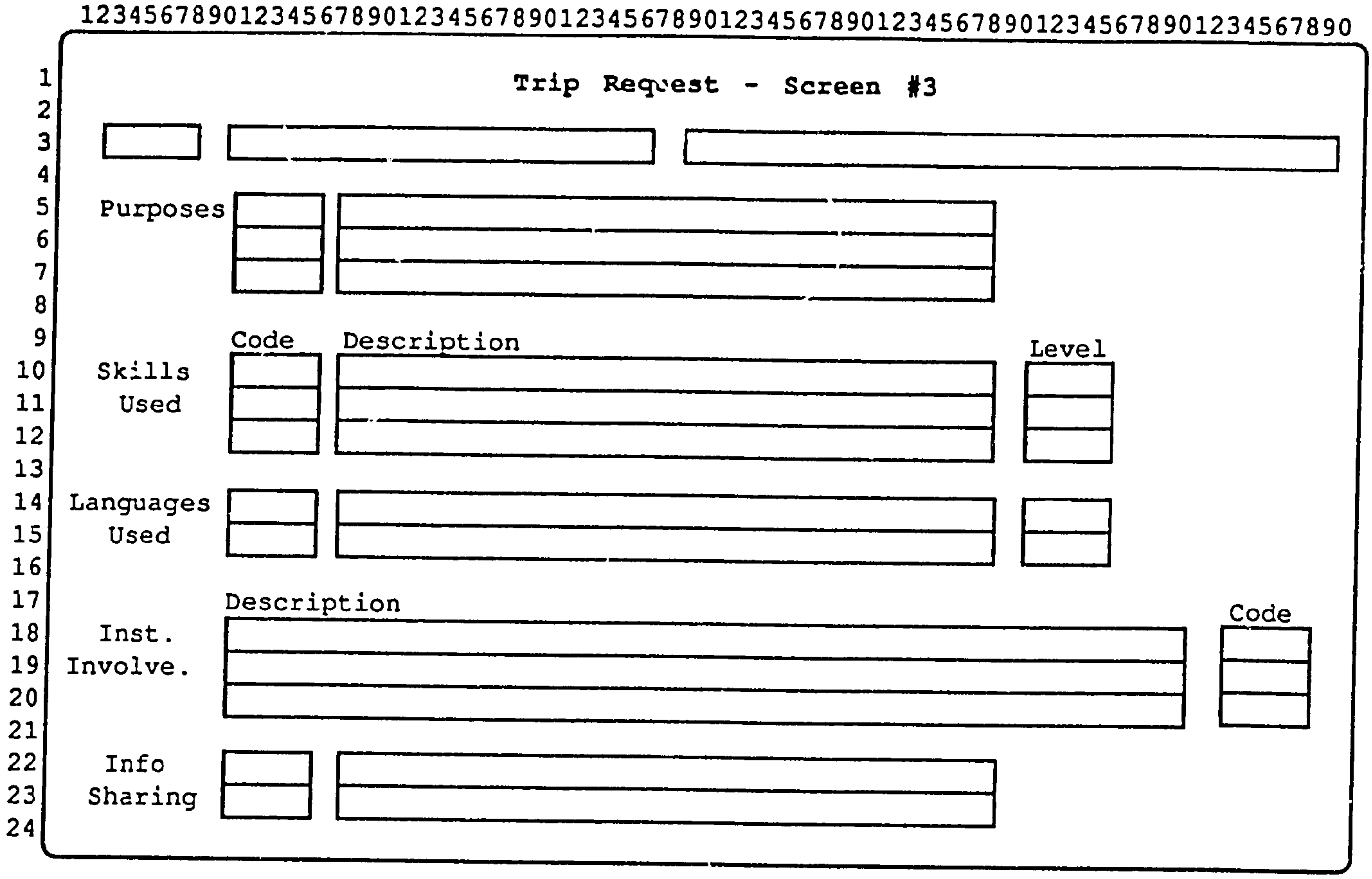


Trip#, Traveler Name & Project Title - Are carried over from the first screen.

Orig. ID - The People File ID# for the Partnership person originating the trip request. The full name, address and phones are then defaulted. F2 provides list of names if needed. User can change this information and have it replace the information in the People File.

Host ID - The People File ID# for the Partnership person hosting the trip at the visited site. The full name, address and phones are then defaulted. F2 provides list of names if needed. User can change this information and have it replace the information in the People File.

Co-Travelers - The People File ID# for each co-traveler is entered, one to a line. F2 provides list of names if needed. The full name and the person's City and State information are then displayed in the filed box to the right. These lines scroll up to accommodate as many travelers as needed.



Trip#, Traveler Name & Project Title - Are carried over from the first screen.

Purposes - Categorizes the objectives of the trip. F2 offers list to select from. One purpose code is entered to a line, with its text description then displayed to the right. Lines scroll up to accommodate as many purposes as needed.

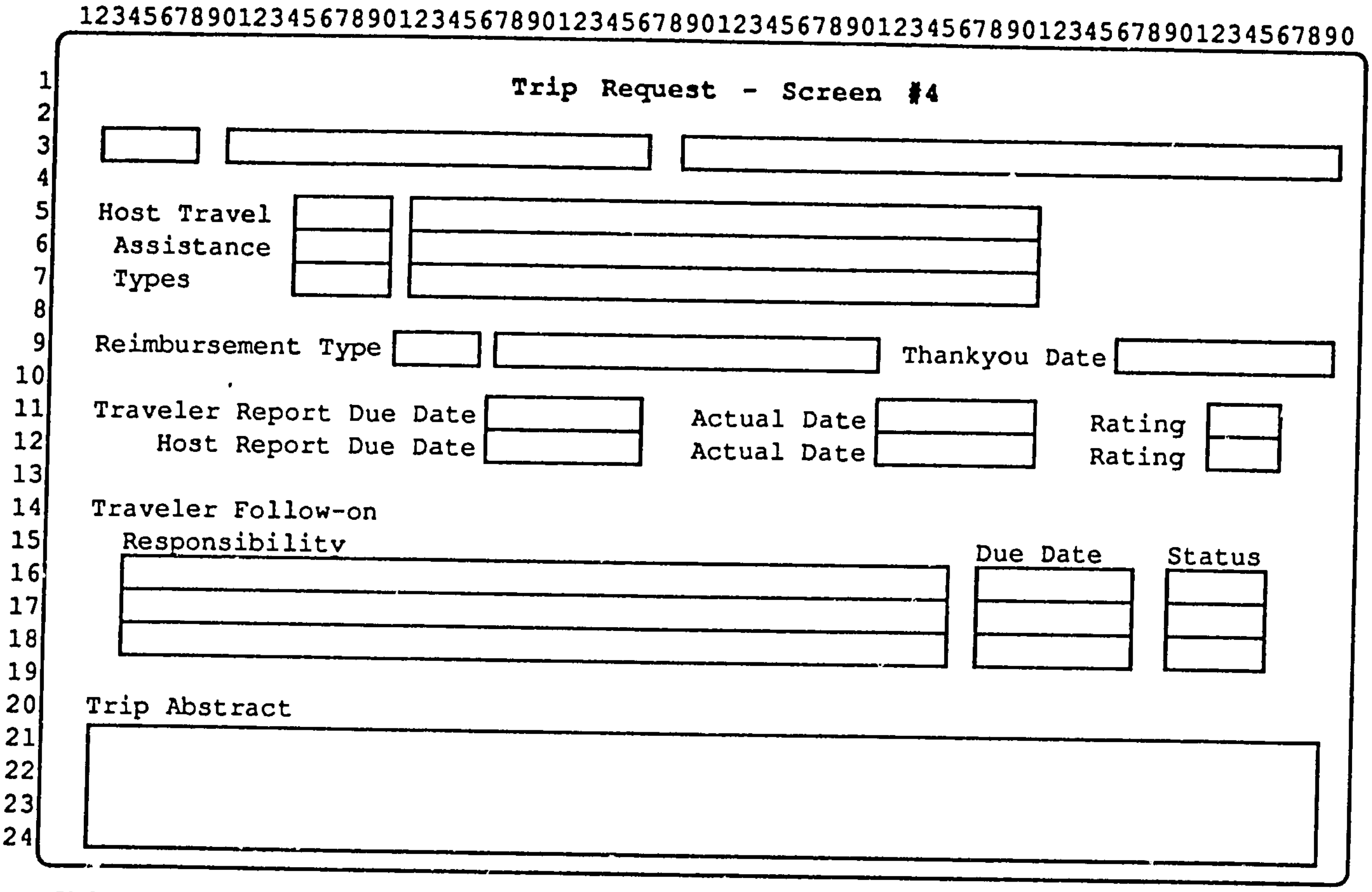
Skills Used - Categorizes the traveler's skills to be used on the trip. F2 offers list to select from. One skill code is entered to a line, with its text description then displayed to the right. Lines scroll up to accommodate as many purposes as needed.

Level - The level of proficiency for <u>each</u> skill is ranked on a 1-2-3 scale, with "3" being highest.

Languages Used - Categorizes the traveler's skills to be used on the trip. F2 offers list to select from. One skill code is entered to a line, with its text description then displayed to the right. Lines scroll up to accommodate as many purposes as needed. The **Level** of language is also ranked on a 1-2-3 scale in the same manner as for skills.

Inst. Involve. - The institutions which will be involved *at the project site* are listed, one to a line, with a **Code** then used to categorize it. F2 offers codes to select from. Lines scroll up to accommodate as many institutions as needed.

Info. Sharing - Categorizes the form of information sharing done following the trip, one to a line. F2 offers codes to select from. The text description is then displayed to the right. Lines scroll up to accommodate as many forms as needed.



Trip#, Traveler Name & Project Title - Are carried over from the first screen.

Host Travel Assistance Types - Categorizes the assistance provided to the traveler by the host, one assistance type to a line. F2 offers list to select from. Lines scroll up to accommodate as many forms of assistance as needed.

Reimbursement Type - Categorizes the form of cash reimbursement to the traveler. The text description is then displayed to the right.

Thankyou Date - Date of the thankyou letter to the traveller.

Traveler & Host Report Dates and Ratings - The information for each is entered in the appropriate field boxes. The ratings are on a 1-5 scale, with "5" being highest. The Trip Due Date has a default of 30 days following the trip return date.

Traveler Follow-on Responsibility - Each responsibility is entered, one to a line, with a **Due Date** and **Status** assigned to each. Lines scroll up to accommodate as many responsibilities as needed.

Trip Abstract- A summary of the trip is given for later reference when searching through files. This is a text field that automatically wordwraps and allows for paragraph structure. The text scrolls up to accommodate an unlimited amount of lines.

```
123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890

                          Partnership  Contact  Log

 Contact# [ 21 ]  Rep ID [ JV ]  Contact Date [03/12/92]  Start Time [ 10:23 ]
 [ Julieta Valls            ]    Last Update  [        ]  End Time   [ 10:52 ]

 Partnership ID [ IA/YU ]  [ Iowa/Yucatan              ]  Contact Type [ T ]

 Person ID [1011 ]  [ Dr. ] [ Jose ] [ Enrique ] [ Baqueiro ]
                    [ Calle 62                 ][ ][                ]
                    [ Merida  ][ ][ Yucatan ][ ][ 97050 ][ ][ Mexico ]
                    HPhone [(52) (99) 25-30-17] BPhone [52) (99) 25-54-99]

 Purpose Codes [T121] [ 1/23/92 Trip                    ]
               [G14 ] [ Kellogg Mini-grant              ]
               [CL12] [ Winter 92 Fundraising Cluster   ]
               [    ] [                                 ]

 Follow-up Date [3/23/92]                  Status [ P ] [ PRIORITY        ]

 Narrative
 [ Dr. Baqueiro indicated that his trip report would be sent in three days.  He
   said that the mini-grant funds were used to purchase a computer while he was
   in Ames and that he has now successfully installed it at the Ag station.  He
   also received a follow-up call from the Kellogg representative on this and ]
```

Contact# - This is a sequential number that is automatically assigned by the computer.

Rep ID - Each user can set the default to his/her own ID#. Help screen identified ID if needed. When the ID is entered, the Rep's name is displayed in the below field box.

Contact Date - Today's date is the default.

Start Time - The current time is the default.

End Time - The system automaically enteres the screen close-out time unless another time has been entered by the user.

Last Update - The system automatically enters the last date when any information was entered or changed on this screen.

Partnership ID - The user can set a default ID. An F2 pop-up provides a listing of codes to select from if necessary. The text name of the Partnership is displayed in the field box to the right.

Contact Type - Indicator of call from, call to, fax, correspondence or other form of communicaiton. An F2 popup gives choices.

Person ID - An F2 popup provides a listing current people associated with this Partnership. If the person is not on file, the user has immediate access to the entry screen for a new person. When the ID is entered, the person's name and contact information is gathered from the People File and is displayed in the field boxes to the right. The user has the option to correct this information on this screen and have it replace the information in the People File.

Purpose Codes - Categorizes the purposes served by the contact. An F2 popup gives choices. The four displayed lines scroll up to allow for an unlimited number of codes, one to a line. When the code is entered, the text description for it is displayed in the field box to its right.

Follow-up Date - The date the user wants to next follow-up on this contact.

Status - The categorization of the follow-up status, e.g., "U" for URGENT, "T" for TERMINATED.

NARRATIVE - A text field for describing the call and its consequences. The text automatically wordwraps and allows for paragraph structure. The text scrolls up to accommodate an unlimited amount of lines.

Example of Rechartering Questions Restructured for Computer Entry

This restructuring has the purpose of organizing the Partnership responses so that the connections are more clearly drawn between a Sub-Committee's long range plans and its related goals, objectives, activities, needed resources and other elements. The questions are virtually identical to those posed by the current forms, except that they are asked for each program sub-committee.

Instructions: Complete this sheet (both sides) for **each** program sub-committee.

Name of the sub-committee

Goals of this sub-committee Identify the *program area* - health, youth development, etc. - and describe the *impacts* you hope to have on it with this sub-committee; e.g., "In Health, we plan to strengthen AIDS prevention efforts in St. Lucia)".

Program Objective(s) List the specific *accomplishments* you plan to have. For example: "1. Reduce high-risk behavior related to the transmission of AIDS/STDs in secondary schools. 2. Increase the availability of condoms at health clinics".

Project Activities Describe *how* you plan to accomplish the objectives described above. For example: "Develop educational materials and train at least 10 teachers/staff in AIDS/STD prevention for use in two secondary schools".

Evaluator *Who* is responsible for ensuring and carrying out the evaluation for this sub-committee? Give the person(s) full name and title within your Partnership.

Obstacles Describe potential for special challenges and obstacles to successful implementation of the listed activities.

Continuity Describe the potential for continuity and follow-on activities

Person completing this sheet:

______________________________ Date ________________