COMPASS

INTRODUCTION TO APPRECIATIVE INQUIRY

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Community Partnerships for Sustainable Resource Management in Malawi

INTRODUCTION TO APPRECIATIVE INQUIRY

Workshop for NGOs and Government Departments Held in Blantyre, Malawi: March 31 – April 8, 2003

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Acronyms

AI	Appreciative Inquiry
CBNRM	Community Based Natural Resource Management
CBO	Community Based Organisation
COMPASS	Community Partnership for Sustainable Resource Management in Malawi
CRECOM	Creative Centre for Community Mobilisation
CSC	Christian Service Committee
DAPP	Development Aid from People to People
ELDP	Evangelical Lutheran Development Programme
NGO	Non-governmental Organisation
NICE	National Initiative for Civic Education
NRM	Natural Resource Management
PRA	Participatory Rural Appraisal
SWOT	Strength Weakness Opportunity Threats
TSP	Training Support for Partners
WESM	Wildlife and Environmental Society of Malawi
WVI	World Vision International

1.0 Introduction

1.1 Background information

Non-governmental organisations (NGOs) and government departments have widely advocated and used participatory approaches as a means for mobilising and ensuring wider community participation in development projects. Many of these approaches, such as the participatory rural appraisal (PRA), focus on identification and analysis of community problems and possible solutions. The Community Partnership for Sustainable Resource Management in Malawi (COMPASS) project has registered some successes where PRA has been used to mobilise communities[1] effectively. Many experiences, however, that the project and its partners have had with the use of PRA, reveal the need to improve the approach or adopt alternative approaches. It has been noted in the natural resource management (NRM) sector that there is need for government departments and NGOs to enable communities identify opportunities that exist in their village; and then initiate development processes that build on their achievements, strengths, local skills and resources. Thus, these organisations need to use approaches that promote self-mobilisation and reliance of the communities.

Realising the need to improve the participatory approaches that its partners currently use, the COMPASS project engaged two consultants to develop training materials and implement a training workshop focusing on assets-based approaches. A training workshop on Appreciative Inquiry (AI) was therefore conducted from 31st March to 8th April 2003 at Hotel Victoria in Blantyre. The workshop drew 20 (18 men and 2 women) participants from various COMPASS partners including both government departments and NGOs (see Annex I: List of Participants).

This document reports on highlight from the training workshop.

1.2 Purpose of the Training Workshop

The purpose of the workshop was to train trainers in AI. Ultimately this effort should strengthen the capacity of Malawian NGOs and government agencies to use participatory approaches in communities through the use of appreciative and assets-based approaches, which encourage greater self-reliance, identification of local assets, and promotion of improved decision-making within groups and the community as a whole.

1.3 Expected Outcomes

By the end of the 8-day workshop, participants were expected to:

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[1] The COMPASS project has registered the Chiling'oma community in Rumphi District as a 'best practice' where the use of PRA has resulted in effective mobilisation of communities for natural resource management. (*COMPASS Document 32: Examples of CBNRM Best-Practices in Malawi*).

- Be able to use appreciative and assets-based approaches to help communities more effectively generate and utilize local resources, and develop action plans for effectively using the resources they have.

- Train others in appreciative processes using materials revised during the workshop.

- Adapt PRA tools making them more "assets-focused.

1.4 Content of the Training Workshop

The workshop focused on experiences with participatory approaches, introduction to AI and the 4-D model, practical application of the 4-D model with other participatory approaches being used in Malawi, adapting other helpful tools to the 4-D process and practice of the AI process with the communities. (Refer to Annex II for detailed content and daily agenda).

1.5 Design of the Workshop

The workshop had four main focal areas – assessment of the participants' experiences with participatory approaches, introduction of the AI approach and exposure of participants to the practical application of AI, and integration of AI with other participatory approaches.

The training workshop can be best described as a workshop within a workshop in that there were two processes running concurrently. While the participants were being trained about the AI approach and its application; they were actually implementing an appreciative inquiry into the participatory approaches currently in use. The idea was to encourage them learn the AI process by doing it.

The concept and approach of AI was therefore introduced to the participants through experiential hands on sessions, short lecturettes, and numerous reading assignments. The facilitators distributed several handouts covering various experiences with AI in different sectors in different parts of the world. It was envisaged that the handouts would help the participants to develop a clear understanding of the concept of AI and have a feel of some of its field application.

Facilitators then involved participants in a series of small group exercises, reflecting the 4-D model (discovery, dream, design and deliver) of AI. In the discovery stage the participants critically examined the participatory approaches that they have been using focusing on the strengths, life-giving factors and wishes for the future. The dream stage involved a visualisation of an organisation that is using participatory approaches to enable the communities effectively mobilise themselves and manage their natural resources using locally available resources. In the design stage the participants came up with goals, objectives and activities, building on the strengths values and wishes identified in the discovery stage, that would transform their organisation to be able to use participatory approaches that would enable communities to mobilise and manage themselves. The delivery stage involved participants applying the AI skills and

knowledge they had learnt during the workshop during sessions with communities currently working with Hope Humana. (Refer to the AI training manual for details on the process guideline and activities).

2.0 Highlights from the Workshop:

2.1 Participants' capacity to use participatory approaches and appreciative inquiry

	Participatory Approaches		Appreciative Inquiry	
Rating and Description: (1) = Lowest/no capacity (5) = Very high capacity able to train others	At beginning of workshop (No. of participants)	At the end of workshop (No. of participants)	At beginning of workshop (No. of participants)	At the end of workshop (No. of participants)
Very low (?) (1)	2	0	9	0
Low – need much help – (2)	0	0	3	0
Average could improve (3)	10	4	6	5
High use it frequently (4)	3	4	1	3
Very high could train (5)	4	5	0	7

At the beginning of the workshop the majority (10) of the participants had an average capacity in participatory approaches and the majority (9) had very little or no capacity in AI. By the end of the workshop however more participants became confident to use and train others in both participatory approaches and AI.

Though some of the participants did not assess their capacities at the end of the course, the analysis shows that there is need for more capacity building in both participatory approaches and AI amongst the workshop participants. Since these people are already familiar with both approaches, they can build their own capacities by critically trying to internalise these approaches into their day-to-day work by adapting the tools and approaches.

Though the majority of the participants had developed a clear understanding of the AI approach and its field application, they still require to test it widely in order to build the confidence and be able to adapt it to their daily work.

2.2 Assessment of level of community participation in COMPASS partner organisations' activities based on the Participation Continuum.

	Passive	Information giving	Consultation	Functional	Interactive participation	Self-mobilisation
Number of ticks	2	1	5	10	4	0

The table above shows that in the approaches used by the majority of COMPASS partners, communities participate by forming groups to meet predetermined objectives of a programme driven by external stakeholders, such participation occurs after the

major decisions have been made. This basically means more efforts are required for the communities to be able to mobilise themselves for development interventions.
The participants noted that sometimes organisations use incentives such as allowances, salaries for community work, or provide refreshments during meetings to achieve community mobilisation and participation. They observed that community mobilisation by using short-term incentives was not sustainable and leads to dependency on external support. Communities participate for the sake of benefiting from the incentives and not to effectively contribute to the development process.

The participation continuum helped the participants to have a clear understanding of the term 'participation'. The key question was how to achieve self-mobilisation of communities in development programmes so that they take the lead in decision-making, and resource mobilisation while the external agents play a facilitating or catalytic role.

2.3 Participants' Observations from the Discovery Phase

2.3.1 THINGS, WHICH WENT ESPECIALLY WELL:

The stories were interesting, real and people were free to talk about their own experiences. The participants noted from their AI sessions with the community that you tend to get better results when stories are real and are from the best experiences within the community.

The participants were able to easily isolate strengths, values, wishes, and themes from the stories. They however observed, when working with communities, that the terms 'strengths', 'values', 'wishes' and 'themes' need to be properly translated into the local language, in order to facilitate effective analysis of the stories by the communities.

The participants further noted that the story telling is best done in pairs. Where there are many community members it can be done in groups of more than two. In such groups several individuals should be asked to tell their stories and the small groups should analyse each story for strengths, values, and wishes.

One group of trainers chose to have community members use symbols and pictures to illustrate their vision. The use of symbols was fascinating. Participants were very creative in using symbols and pictures to denote strengths, values, wishes and themes, and seemed to enjoy using them.

2.3.2 THINGS THAT COULD HAVE BEEN DONE BETTER

The facilitators (workshop participants) need to believe in the AI approach and be able to confidently facilitate the process; otherwise it is very easy to revert to the problem-focused approach when dealing with the communities. The trainers observed that a few of the workshop participants were not confident that the AI process could work with communities particularly those who missed the introductory sessions or did not read the handouts provided.

To get the full participation of the entire community in the analysis, the focus of the inquiry should be something for which every member of the group has an experience. Otherwise if some members do not have any experience in the topic they will not be able to effectively contribute.

Group/community members need to be thoroughly familiar with the inquiry questions so that anybody can ask questions and probe into issues during the analysis process. This will promote community ownership of the AI process and continuity in the subsequent processes.

During the presentations of the analysis from the stories, the entire group or community need to go into a deeper analysis of how each strength, asset, or value contributed to the success in the story so that all could clearly see how such a factor contributed to the success and how it could be repeated or taken advantage of.

2.3.3 Other participatory tools that could be adapted for the Discovery stage of the AI

The participants identified many PRA tools that can be adapted for the discovery process

- *Focus group discussions* – the stories can be shared and analysed for strengths, values, and wishes in focus groups. Can be used for identification of focus topics for inquiry.

- *Opportunity transect walks* – the community or group can go on an opportunity transect walk where the resources and best practices would be identified and noted.

- *Mapping* – community resource map, assets map, or a map showing the community best practices may be produced by the community itself.

- *Stakeholder analysis* – within particular community stakeholders, a particular activity may be identified and their respective strengths and roles defined.

- *Strengths, Weakness, Opportunity Threat Analysis (SWOT)* – focus on strengths and opportunities, turn weaknesses and threats into wishes

- *Trend analysis* – focus on positive trends, turn any negative trends into wishes

- *Seasonal calendar* – focus on goods moments in the year

- *Songs* – use appreciative questions to process the songs.

2.3.4 HIGHLIGHTS OF STRENGTHS, VALUES AND WISHES FROM PARTICIPANTS' SUCCESSFUL WORK WITH COMMUNITIES

During the discovery phase of the 4-D process the participants identified the following as the strengths, enabling elements/values and wishes for them to effectively work with communities:

Strengths:
- *Individual commitment to implement activities*
- *Good relationship with the communities*
- *Co-ordination amongst service providers*
- *People willingness to learn*
- *Effective approaches and tools available*
- *Some communities are able to mobilise themselves*
- *Good facilitation skills*
- *Existence of indigenous knowledge and skills*
- *Ability to identify and mobilise locally available resources*
- *Ability to discuss and resolve issues*

Values
- *Transparency and accountability when dealing with the communities and other stakeholders*
- *Good education*
- *Integrity*
- *Love*
- *Respect the views of the local people*
- *Mutual understanding*

Wishes
- *Self-mobilisation of communities*
- *Self-reliant reliant communities*
- *Improved communication*
- *Well co-ordinated and collaborative development approach*
- *Effective community leadership*
- *Partnership between extension workers and community*
- *Community ownership*
- *Needs of the communities are addressed*
- *Improved capacities for communities to manage*
- *Fair treatment of women, children and other vulnerable people*
- *Vibrant community that can sustain development processes*

2.4 Participants' Observations from the Dream phase

2.4.1 WHAT WENT WELL

Both the participants and community members[2] involved in AI were able to come up with very meaningful pictures and symbols expressing their dreams. The participants noted that it was easier for the people to express their dreams through pictures and symbols than through words.

During sessions with communities the participants in one group discovered that they were able to come up with provocative propositions/possibility statements by directly interpreting the pictorial presentation of the dreams into words. This was easier than

[2] Only one group from the workshop chose to encourage community members to use pictures and symbols.

when they tried to come up with possibility statements by writing a radio brief or newspaper column press release (part of the training exercise).

2.4.2 WHAT COULD HAVE BEEN BETTER

The participants should have come up with dreams depicting changes in their group or organisations as a service provider to the communities. Both the participants and facilitators observed that most of the dreams that the participants came up with were based on what the communities could do, and not what they could do to their organisation to make it a more efficient service provider. They therefore found it difficult to come up with goals and objectives that were linked to their strengths, values and wishes expressed in the discovery stage.

The dreams are about what the community or a particular group visualise could be done within their own strengths, life giving elements and wishes, and dreaming is internal within the group.

2.4.3 OTHER PARTICIPATORY TOOLS THAT COULD BE ADAPTED FOR THE DREAM PHASE OF THE 4-D PROCESS

Mapping – the community or group could produce a map of how they would like their resources to be based on what is already available

Historical trend – the group could predict a positive trend of a particular resource. This could be in pictures, symbols or words or figures

Group discussions – the group could come up with statements and symbols to express their dream

2.4.4 Highlight of Possibility Statements for the PIM community that works with DAAP in Chiradzulu district

1. *Well-educated and highly skilled orphans that are either self-employed or on good jobs and are fully independent.*

2. *The old people in the village are staying in very good and clean houses with nice pit latrines and have enough food from properly managed gardens of their own.*

3. *The village drug-box has a wide variety of drugs, which are replenished and managed by the village community*

4. *The entire village community is united and committed to fight the HIV/AIDS pandemic.*

These statements were based on the communities' own strengths/assets, values and wishes

2.5 Participants' observation from the design stage of the 4-D process

2.5.1 What went on well?

One community noted that with clearly spelt dreams, it was very easy for them to decide on what to do and how. 'It is like deciding on what route to take if you already know your destination, whether you want to use a plane, a bicycle or walk'. Remarked one of the participants.

The design stage is basically a planning stage. The participants were very familiar with planning. What required more attention was how to link the strengths, values and wishes from the discovery phase to the design.

2.5.2 What could have been done better

AI processes with communities should focus on those things that the communities can do better on their own. Some participants expressed worries that, considering the high level of poverty within the rural populations in Malawi, AI may not be a suitable approach to promote for rural development. The assumption was that poor communities need a lot of external assistance in order to improve. The facilitators noted that there are a lot of aspects of community development that do not need external resources. Some may require that the communities share existing resources, while others may require better organisation and sharing of roles and responsibilities. For example the community may not need resources if they wanted to manage their grazing land better. There are lots of community groups, which are not able to effectively manage themselves. Can't these improve without external resources?

Participants were therefore encouraged to explore possibilities of using AI within the scopes of their work. It was observed that one organisation was already using AI when conducting staff performance appraisals. "Before this approach was adopted there were a lot of tensions during staff performance appraisals, but since we started using the AI approach people like staff performance appraisals," remarked the participant from the organisation.

2.6 Observations of the participants on the deliver/do stage of the 4-D process

2.6.1 WHAT WENT ON WELL

The appreciative openers/warm-ups and appreciative feedback/closing allowed those who signed up to creatively adapt the tools they were familiar with to suit the AI approach.

The practice of AI sessions with communities helped to build more confidence amongst the participants to be able to use AI. Furthermore participants noted that it was much more easier to use AI in the community setting than it was during the workshop.

2.6.2 WHAT COULD HAVE BEEN DONE BETTER

The 'Do' phase was practiced through a discussion simulating the actual implementation process. The participants noted that they felt like they were continuing with the design phase.

3.0 Next steps with AI from the Workshop

a) Networking, collaboration and information sharing amongst the participants –

- The workshop agreed to circulate a full list of all participants and facilitators that has addresses, emails, phones, and fax numbers. This would enable the participants to communicate, consult and collaborate after the workshop.

- Those in close proximity with each other need to form some working teams that can train or facilitate together.

- The improved manual to be circulated to the participants so that they can use it as a reference material.

b) Follow up to the communities where the AI process had been initiated

- DAPP (Jimmy Katuma) and COMPASS (Nobel Moyo) to plan a follow-up programme and continuation strategy in the three communities.

- From each of the three communities only a few volunteers and leaders participated in the AI process. For the process to be more effective the entire village communities from which the volunteers and leaders came need to go through the AI process.

- Magomero Community Development College will consider reaching the current students with an AI approach.

4.0 General Observations by the Facilitators of the Workshops

The workshop design assumed that participants would be fully involved throughout from the beginning to the end in order to fully understand the approach and master the skills. Most participants did in fact meet this expectation, however a few participants joined the workshop either on day two or three hence missing the entire introductory part and key aspects of the 4-D model.

Any approach is best implemented by those who believe in it and are committed to see it succeed. Most participants were actually very interested and committed to the process. The facilitators however observed that a few participants showed little interest to learn AI. This was demonstrated by frequent absenteeism and a general negative attitude by such participants. It would have been better if others who were willing to learn filled up their spaces. Considering the costs involved in training, it is recommended that COMPASS partners seriously look into the way they select participants for training of trainers courses. Only those interested and willing to learn should be considered.

Annex I: List of Participants

Name	Organisation	Post	Address
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Wilfred Ndovi	COMPASS	SGM	P/B 263, Blantyre Tel: 01622800
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Annex II: Workshop Content and Schedule

Day One

Monday, March 31

- Workshop Opening Comments
- Introductions and expectations: Mini-AI process
- Overview of workshop purpose, expected outcomes, process, and sequence
- Participatory Approaches – What are they? Why are they important? What has been our experience and results? (Includes results of COMPASS study on participatory approaches in Malawi)
- Introduction to AI and 4-D process
- 5th D – defining the focus of the overall inquiry -- strengthen community, evaluation, strategic planning, etc.
- Focus of our inquiry was: "The use of participatory approaches with communities in Malawi"
- DISCOVERY Phase: Participants interview each other to discover high points – in order to identify
  - Best experiences
  - Strengths and resources
  - Values (yourself, your group, your community)
  - Core life-giving factors
  - Three wishes
- Preparing to interview (2 handouts-- Watkins pp.104 and 105 – guidelines and key characteristics)
- DISCOVERY – continued (Identifying and compiling themes and wishes)
- Other Helpful Tools:
- Process Dialogue and Facilitation Hints
- Sign up for openings and closings; Prepare Openings for Tues.-Fri. related to activities of that day
- Appreciative Feedback

Day Two

Tuesday, April 1

- Appreciative opening (BEATRICE & CAPS)
- Theory behind AI
- Review strengths and themes from DISCOVERY Stage
- DREAM – Participants develop a positive shared future built upon the resources they have identified
  - Visualization
- DREAM phase Continued
  - Developing Provocative Propositions (possibility statements)
  - "Valuating" the Vision
- Other Helpful Tools:
- Process Dialogue and Facilitation Hints
- Appreciative Feedback (NOBEL)

Day Three

Wednesday, April 2

- Appreciative opening (WILFRED)
- Review elements of DREAM from yesterday
- DESIGN—Designing systems and processes that will help to achieve dreams (may mean redefining approaches to leadership, governance, participation, capacity building, roles and responsibilities, institutional relationships, mobilizing resources.
    - Sort issues in vision
    - Prioritise dreams
    - 3 crucial parts:
        - Detailed plan of action -- strategies and activities
        - Ownership
        - Monitoring and evaluation
    - Verify links between strengths, assets, and action plan
- DESIGN – continued
    - Set short-term objectives and long-term goals
    - Structural changes to the group and the way it functions
- Helpful Tools:
    - Tree of life – foundation, nourishing elements, buds and shoots, etc.
    - Gender Checklist
- Process Dialogue and Facilitation Hints
- Teams Sign-up and Prepare for Demonstration Sessions Thurs. and Fri.
- Appreciative Feedback (CHARLES)

Day Four

Thursday, April 3

- Appreciative opening (JIMMY)
- DO: group members implement action plans -- mobilize resources, form new relationships, acquire new skills, and implement action plans. Collective vision should guide collective action.
    - Develop qualities of effective delivery
    - Narrowing the focus:
        - (Dream) For our children and grandchildren 5-10 years
        - (Design) 1-year plan aimed at vision)
        - (Delivery) 1 wk-1 month action plan to get started
        - ("Do it now") what can be done at this workshop—a first step
    - Roles and responsibilities
    - Personal commitment
    - Keeping AI Rolling
- Helpful Tools:
  Gender Checklist
- AI Contrasted with Participatory Problem-focused CD approaches, e.g. PRA
- Participant Trainers' Demonstrations (3 1-hr sessions[3])
- Process Dialogue and Facilitation Hints
- Appreciative Feedback (ROBINS)

[3] Each team session will include a 40-minute demonstration and 15-minutes for "appreciative feedback."

Day Five

Friday, April 4

- Appreciative Opening (COLLINS)
- Participant Trainers' Demonstrations (3 1-hr. sessions)
- Participant Trainers' Demonstrations (3 1-hur. Sessions)
- Process Dialogue and Facilitation Hints
- Appreciative Feedback (HENRY)

Day Six (1/2 day)

Saturday, April 5

- Appreciative Opening (CHARLES)
- Prepare for field practicum (4 teams, each with a COMPASS facilitator) – decide and plan two 2.5-hour sessions with communities.
- Appreciative Feedback and closing for day (KASOTI)

Afternoon – free

Day Seven

Monday, April 7

- Overview of day and travel to communities
- Trainer Field Demonstrations (4 teams of 5 or 6 including COMPASS facilitator)
- Feedback/debrief community sessions (each group 15 minutes in fishbowl to discuss among selves, then 15 minutes for questions from others – includes recommended revisions
- Review program for Tuesday
- Appreciative Feedback

Day Eight

Tuesday, April 8

- Overview of day and travel to communities
- Trainer Field Demonstrations
- Feedback/debrief community sessions (each group 15 minutes in fishbowl to discuss among selves, then 15 minutes for questions from others– includes recommended revisions)
- Next Steps
- Workshop "Valuation"
- Handing over Certificates & Celebrate!

COMPASS Publications

Document Number	Title	Author(s)	Date
Document 1	COMPASS Year 1 Work Plan	COMPASS	Jul-99
Document 2	COMPASS Small Grants Management Manual	Umphawi, A., Clausen, R., Watson, A.	Sep-99
Document 3	Year 2 Annual Work Plan	COMPASS	Dec-99
Document 4	July 1 - September 30, 1999: Quarterly Report	COMPASS	Oct-99
Document 5	Training Needs Assessment: Responsive Modules & Training Approach	Mwakanema, G.	Nov-99
Document 6	Guidelines and Tools for Community-Based Monitoring	Svendsen, D.	Nov-99
Document 7	Policy Framework for CBNRM in Malawi: A Review of Laws, Policies and Practices	Trick, P.	Dec-99
Document 8	Performance Monitoring for COMPASS and for CBNRM in Malawi	Zador, M.	Feb-00
Document 9	October 1 - December 31, 1999: Quarterly Report	COMPASS	Jan-00
Document 10	Workshop on Principles and Approaches for CBNRM in Malawi: An assessment of needs for effective implementation of CBNRM	Watson, A.	Mar-00
Document 11	January 1 - March 31, 2000: Quarterly Report	COMPASS	Apr-00
Document 12	Thandizo la Ndalama za Kasamalidwe ka Zachilengedwe (Small Grants Manual in Chichewa)	Mphaka, P.	Apr-00
Document 13	Njira Zomwe Gulu Lingatsate Powunikira Limodzi Momwe Ntchito Ikuyendera (Guidelines and Tools for Community-based Monitoring in Chichewa)	Svendsen, D. - Translated by Mphaka, P. and Umphawi, A.	May-00
Document 14	Grass-roots Advocacy for Policy Reform: The Institutional Mechanisms, Sectoral Issues and Key Agenda Items	Lowore, J. and Wilson, J.	Jun-00
Document 15	A Strategic Framework for CBNRM Media Campaigns in Malawi	Sneed, T.	Jul-00
Document 16	Training Activities for Community-based Monitoring	Svendsen, D.	Jul-00
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Document 22	Opportunities for Sustainable Financing of CBNRM in Malawi: A	Watson, A.	Nov-00

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Document 23	Framework for Strategic Planning for CBNRM in Malawi	Simons, G.	Nov-00
Document 24	Kabuku Kakwandula Ndondomeko ya Thumba Lapadera la Wupu wa COMPASS (Chitumbuka version of the COMPASS Small-grant Manual)	Umphawi, A., Clausen, R. & Watson, A. Translated by Chirwa, T.H. & Kapila, M.	Dec-00
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Document 27	COMPASS Grantee Performance Report	Umphawi, A.	Mar-01
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