

**FY 1985 ANNUAL REPORT  
AND  
FY 1986 FORWARD PLAN  
OF  
A.I.D. DOCUMENT AND INFORMATION HANDLING FACILITY**

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by

LTS Corporation  
311 Maple Avenue West, Suite A  
Vienna, VA. 22180

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## A. Background of the A.I.D. Document and Information Handling Facility

The origins of the A.I.D. Document and Information Handling Facility (DIHF), as it currently exists, can be traced back to A.I.D.'s first efforts in the mid-1970's to systematically manage its institutional memory of project-generated experiential and technical information. These efforts were articulated in the program concept entitled "Information as A Tool In Development" which described a series of information technologies that could be used to improve the planning, administration, technology transfer function, and evaluation of AID-sponsored projects. Action on this concept resulted in the setting up of various development information functions which were performed piecemeal until their consolidation under a contract awarded in 1981. This three-year contract, sponsored by the Bureau for Science and Technology and awarded to Computer Data Systems, Inc. (CDSI), called for the establishment of the A.I.D. DIHF.

The specific objectives of the activity were to:

1. Acquire and process all relevant AID-generated documents needed to provide accurate, up-to-date information of AID's project and research related experience.
2. Develop and install an improved data base management system, building upon the invested base of systems and computer operations that AID had made between 1974 and 1981;
3. Convert key source documents to microfiche as a means to ensure the creation of a permanent record of AID-generated documents;
4. Provide a single focal point within the agency for acquiring and disseminating AID-sponsored documents so that AID/W and USAID, as well as others, could quickly and easily gain access to these materials;
5. Provide the resources to publish and distribute information to individuals and institutions here and abroad who require or seek information on AID operations; and,
6. Work closely with AID management to develop and implement plans designed to improve the flow and use of information between USAID missions, AID/W and the many and varied clientele each serves.

During 1983, agency responsibility for the DIHF was transferred to the newly established Center for Development Information and Evaluation in the Bureau for Program Policy and Coordination (PPC/CDIE).

In 1984, the objectives of the "Information as Tool in Development" project were found, with some minor variations, to still be valid and a new, five-year contract for continued

operation of the Facility was awarded to Logical Technical Services Corporation (LTS).

Additional tasks, reflective of the new locus of responsibility within the agency for these functions, were assigned to the DIHF at this time. These include:

1. Assisting the agency in converting a larger portion of its Official Project records to microfiche as a means to both preserve and more efficiently organize and use project documents;
2. Develop and support a series of strategies designed to expand the knowledge of and use of resources available to AID personnel through the newly established Center for Development Information and Evaluation;
3. Institutions more formal data collection and evaluation techniques to create a larger body of information regarding how scientific, technical and programmatic information is used within the agency;
4. Introducing new and innovative information processing techniques to take advantage of the burgeoning use of microcomputers and advanced information processing software; and,
5. Restructuring the thrust of DIHF's mission to be more closely attuned to the shifting needs of the Agency as defined by CDIE's mission and to provide the means to integrate DIHF operations into on-going or planned agency-wide information processing and distribution systems.

Modifications to the new DIHF contract included:

- o changing contract language to emphasize support for AID/W and USAID needs on a level equal to that of LDC institutions.
- o introducing service evaluation and quality control functions to ensure the relevance and quality of DIHF products and services; and ,
- o the removal from the DIHF contract and incorporation into another CDIE contract of primary responsibility for the overseas technical assistance involved in implementing the transfer of development information to developing countries.

In the following sections of this report, LTS provides information on what it has accomplished during its first year of contract management responsibility (FY 1985) and describes, in systematic fashion, its plans for the next year of operations.

## B. Overview of Facility

### B.1. Summary of Work Scope

The DIHF's objectives are to serve as central support operation to meet the information processing and dissemination requirements of the Center for Development Information and Evaluation (CDIE). The functions, as spelled out in the contract scope of work are:

1. Systems Development - involving computer systems operations and software development;
2. Document Acquisitions;
3. Document and materials processing which includes:
  - o Cataloging
  - o Abstracting
  - o Indexing
  - o Thesaurus maintenance;
4. User Services including on-demand document delivery, bulk document dissemination, and inventory management;
5. Micrographics processing involving the conversion of key project and technical, as well as Official Project records, to microfiche;
6. Outreach and Publications efforts designed to expand awareness of CDIE products and services;
7. Training of personnel to use the resources developed by and available through CDIE for using information handling technologies;
8. Quality Assurance and Control designed to monitor and act promptly to resolve issues; and,
9. Management strategies designed to efficiently allocate and employ available resources in support of CDIE requirements.

The work was to be carried out in three distinct phases listed as:

- Phase I: Facility Planning (Year 1 only);
- Phase II: Facility Operations (including conversion of official agency records to microfiche) -- Years 1 - 5;
- Phase III: Technology Transfer -- Years 1 - 5.

As indicated above, the planning to reflect the new and expanded scope of the DIHF was to occur during Year 1, during which existing and on-going operations would continue to ensure un-interrupted support. As new plans were developed and approved, they would slowly be introduced and become operational.

## B.2. Relationship to CDIE Mission

In carrying out its contractual obligations, while simultaneously meeting the evolving goals and objectives of the newly established CDIE, the DIHF has been sensitive to the need to modify its operating procedures and objectives. As indicated above, the primary emphasis of PPC/CDIE's program goals became different than those of the S&T Bureau with major shifts in emphasis being in:

- The collection of more current project information;
- The modification of procedures to be more supportive of the evaluation process;
- Less emphasis on technical report literature not prepared or funded by AID;
- Devising new procedures and techniques to acquire Mission-generated information in keeping with the greater role missions will play as the result of the decentralization;
- The expanded use of microfiche by project officers and technical personnel in the day-to-day management of projects;
- Methods of information processing that yield higher levels of productivity of key project and program information needed in the project design and evaluation process; and,
- The development of procedures that will facilitate the integration of the DIS "Institutional Memory" into the planning, design, management and evaluation process.

## B.3 Relationship to M/SER/MO/CRM

Since a third of the DIHF project is supported by M/SER/MO/CRM to manage its AID Project Document Micrographics System (APDMS), an increasing emphasis was given to improving the coordination of services between PPC and M/SER/MO in the flow and use of project documents needed to meet a variety of internal needs. While the APDMS effort was designed to meet both the archival and current records management functions at the bureau level, through the institution of standardized, agency-wide file management procedures, systematic processing of bureau records has afforded access to this information to a larger user audience than was possible in the past. Efforts were initiated to identify and process "key" documents, that were often not readily available using normal CDIE or DIHF acquisition or document distribution channels.

During the year, the DIHF's efforts have resulted in the conversion and updating of project records into microfiche for the following bureaus:

- Africa
- Africa Regional
- Near East
- Asia
- Contracts

The availability of this corpus of information, organized in accordance with an agency-wide format and available in microfiche format, creates opportunities for information sharing and distribution not available at the onset of this effort.

Personnel in AID/W or at the mission level can request selected or complete project documentation in paper copy or in microfiche with some guarantee that (1) the documentation exists, (2) that it can be provided on a timely basis, and (3) ongoing efforts to keep active project files current are underway. In addition, information about these documents can be searched using a common data storage and retrieval system that is compatible with the PPC/CDIE-sponsored Development Information System (DIS).

#### B.4 DIHF Operations Environment

Serving as a central focal point for the receipt, processing, file maintenance, and dissemination of project-related and AID-sponsored technical documentation, the DIHF must relate to a number of operating policies. Those include:

- the decentralization of project implementation and funding at the mission level which impacts the distribution of "key" project documents since decision-making authority rests in the mission;
- the CDSS review and planning guidelines which call for project and program designers to review AID's institutional memory in conjunction with developing long range development strategies to determine what has not worked in the past under similar development condition;
- the evolving policies regarding the use of advanced technologies within the agency (such as microcomputers, telecommunications links, etc);
- the sometimes conflicting internal guidelines promulgated by various offices governing such activities as mail handling, information systems and data sharing, report preparation procedures, and reviews.

Making this operation more closely linked to the overall goals and objectives of PPC/CDIE has been of major importance to all DIHF efforts during FY85. Establishing our role within CDIE's evolving efforts to meet its own goals and objectives and improve the flow of development information between AID/W and the field, has been and will continue to be high on our list of priorities.

It is anticipated that these policies will mandate greater use of development information in the planning, design and evaluation process, and that CDIE and DIHF must be in position to meet the demand this process will generate.

It is within this context that the first year of DIHF management under LTS leadership has evolved. Specifics on progress made in each area of project operations are presented in the following sections.

### C. Progress and Plans by Function

In this section of the report information is presented on each of the major functional areas of work as described in Section B.1 above. Work performed during FY1985 is presented initially followed by a discussion of proposed tasks and plans scheduled to be undertaken during FY1986. Interspersed throughout the various sections are tables and charts designed to provide the reader with specific details on the level(s) of performance. A summary of operational statistics is presented as Exhibit C.9.2.

In FY1986, the use of the Harvard Total Project Management software package, to define and monitor the status of project and subproject level tasks, will be introduced. This tool will be of major importance in identifying the various tasks which are considered to be of primary importance and to permit a standard base of reference throughout the year in identifying tasks, areas of individual staff responsibility and resource utilization. These reports and diagrams will be used selectively at first in management meetings to review the status of tasks, to add or rearrange the priority of tasks, and to determine the impact of unanticipated or new requirements upon existing DIHF operations. Gradually, as more DIHF operations become programmed, it will be possible to monitor the status of all activities using this approach.

PERT roadmaps, GANNT schedules and project "to do" lists will be generated to provide a baseline on the status of work begun in a particular functional area as of October 1, 1985, and what is expected to be done by September 30, 1986. Periodic updates to these charts will permit management to determine what progress has been made at the time the review is made and to modify the plan as necessary.

## C.1 SYSTEMS DEVELOPMENT, OPERATIONS, AND MAINTENANCE.

The Systems Development Group (SDG) is responsible for the computer development, maintenance, and continued operations of the DIHF micro and minicomputer facilities and their supporting computer files and software. This involves performing tasks to maintain and improve the present level of services.

To maintain the present level of services, SDG:

- a. Monitors micro and minicomputer equipment use and,
  - (1) resolves hardware problems.
  - (2) identifies hardware constraints.
  - (3) recommends equipment improvement strategies.
  - (4) initiates and reviews equipment acquisitions.
  - (5) investigates applicability of products available from user-contributed library and other sources.
  
- b. Maintains liaison with software vendors and reviews the uses made of available software, and,
  - (1) maintains DIHF software (primarily MINISIS and HP/3000 operating system and utilities) and resolves problems.
  - (2) implements computer security and software standards.
  - (3) recommends software improvement strategies.
  - (4) initiates and reviews software acquisitions.
  - (5) installs new versions of computer software and orients users to new features and constraints.

### C.1.2 FY1985 Accomplishments.

Last year, in support of MINISIS data base maintenance alone, it is estimated that the SDG staff provided for the creation of 24 data bases and the elimination of two, modified and/or created over 100 print formats, added over 120 inverted files, and performed maintenance on nearly 200 data base fields. In addition, the staff installed and tested six releases of MINISIS, and incorporated use of the AID Thesaurus twice.

In addition to maintaining the ongoing AID/DIHF operations, SDG was engaged in a number of tasks which were or are being identified as areas where SDG may improve existing operations. As an example, two 'user-friendly' menu systems were developed in FY85 to facilitate the use of AID project/document information. They were demonstrated at the 1985 Conference of MINISIS Users, and many development organizations expressed an interest in the software. One system is being made available to the development community via the IDRC user-contributed library. The other is in the process of being installed in the AID/Cairo mission.

In the sections that follow, goals and objectives of various SDG tasks are described.

C.1. SDG Goals and Tasks: FY1985

C.1.2.1 Thesaurus Conversion and Updates

SDG was scheduled to convert and load AID terms to an online thesaurus in FY1985. The thesaurus was converted and loaded on schedule.

The scope of the task, however, had to be expanded to include a second conversion and loading in the summer. This was necessary to accomodate the requirements of the new version of MINISIS software that was installed.

C.1.2.2 Mailing List Development and Maintenance.

SDG was scheduled to create a new data base formed from the contents of the AID Management Handbook, and then to merge the contents of EVALRD and REQUESTR data bases.

SDG created a new data base named RECIPRD, as scheduled. The contents of the EVALRD and REQUESTR data bases were not merged. It was determined the RECIPRD data base was to contain only AID/W and AID/M records.

C.1.2.3 Integrate DOCRD and CATALOG.

A feasibility study for integrating DOCRD and CATALOG was scheduled, but this activity was postponed.

C.1.2.4 Integrate BUREAU and PROJRD.

A feasibility study for integrating BUREAU and PROJRD was scheduled, but this activity was postponed.

C.1.2.5 OCLC Conversion.

OCLC records were scheduled to be loaded, however due to the Machine-Readable-Cataloguing (MARC) format of the records, it was necessary to delay the loading until Version F.01 of MINISIS was installed at the DIHF.

C.1.2.6 NTIS Tape Conversion.

NTIS tapes were to be converted in an effort to establish an exchange of data with the NTIS. It is now, however, in question whether an exchange of data is to the advantage of DIHF. It is considered more likely that DIHF will be sending NTIS microfiche header tapes.

### C.1.2.7 Online Document Ordering System.

The design and implementation of the Online Document Ordering System has been integrated into SDG's plans to enhance the MENUDIS system in FY1986.

### C.1.2.8 Exchange Databases.

SDG established an exchange of data bases with the IDRC. The extent that this exchange required limited DIHF disc storage space, however, identified a need to assess the costs and benefits of any additional exchanges of donor data bases prior to effecting an exchange.

### C.1.2.9 Library Automation.

SDG began a review of requirements for automating AID Library functions. The Users Manual of the LOANS system in Wageningen was translated and reviewed to determine its applicability to AID requirements. A demonstration of the system was received at the MINISIS Users Group Conference.

SDG is scheduled to complete a definition of AID Library automation requirements in FY1986. Implementation will be scheduled on the basis of these requirements.

### C.1.2.10 MINISIS Version F and Other Software Upgrades.

SDG installed six pre-releases of MINISIS F.01 software. Each resulted in problems with operations that required SDG staff assistance. The problems were identified and submitted to IDRC for resolution. IDRC plans to make the changes we and others have identified, and prepare a final release early next year.

SDG has received HP/MPE/V Version T Delta 2 software which they plan to install December 1985. The new release may exacerbate performance problems, in particular, excessive CPU usage. If this occurs, corrective measures will be employed. The version may be deinstalled for the period of time necessary to correct this problem.

# Exhibit C.1 - Systems Development Group FY86 Plans

Project: sqgpin86

3-Jan-1986

Page 1

Name	Responsible Code	Duration Description	Slack	Start date	Finish date	% Complete
OnLinOr2		260.00 Dys W Phase II: Online Ordering System		1-Oct-1985 12:00PM	30-Sep-1986 12:00PM	
OnLinOr1		260.00 Dys W Phase I: Online Ordering System		1-Oct-1985 12:00PM	30-Sep-1986 12:00PM	
LibAutoP	Wolter/Wiles	260.00 Dys W Develop Plan for Automating AID Library		1-Oct-1985 12:00PM	30-Sep-1986 12:00PM	
AccTrack	Vadas/Wiles	260.00 Dys W Develop Coordinated Tracking Plans for Acquisitions		1-Oct-1985 12:00PM	30-Sep-1986 12:00PM	
AccTrkIm	R.Wiles	260.00 Dys W Implement Coordinated Acquisitions Tracking System		1-Oct-1985 12:00PM	30-Sep-1986 12:00PM	
GeoBurDB	L.Crone	260.00 Dys W Maintain GeoBureau Data Bases		1-Oct-1985 12:00PM	30-Sep-1986 12:00PM	
Updates	Phillips	260.00 Dys W Make Mailing List DB Updates		1-Oct-1985 12:00PM	30-Sep-1986 12:00PM	
MERGList	Phillips/Wile	260.00 Dys W Merge Mailing Lists for CDIE		1-Oct-1985 12:00PM	30-Sep-1986 12:00PM	
Start		1.00 Dys W		1-Oct-1985 12:00PM	2-Oct-1985 12:00PM	
OrderRD	Wardell	364.00 Dys E Maintain ORDERRD		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
150Tests	J.Wardell	210.00 Dys E 154.00 Dys E Cost/Benefit Analyses of HP150/WP		1-Oct-1985 12:00PM	29-Apr-1986 12:00PM	0
DBAJob	R. Wiles	180.00 Dys E 184.00 Dys E Transition MINISIS to DBA Position		1-Oct-1985 12:00PM	30-Mar-1986 12:00PM	0
MINPerf	J.Wardell	150.00 Dys E 214.00 Dys E Conduct/Report on MINISIS Performance Tests		1-Oct-1985 12:00PM	28-Feb-1986 12:00PM	0
37Tests	L.Young	120.00 Dys E 244.00 Dys E Perform HP/37 Benchmark Tests		1-Oct-1985 12:00PM	29-Jan-1986 12:00PM	0
Serials	Wolter/Betts	364.00 Dys E Develop Specifications for Serials Tracking System		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
EstBrows	J.Wardell	104.00 Dys E 260.00 Dys E Develop Report Browse Module		1-Oct-1985 12:00PM	13-Jan-1986 12:00PM	0
UserAsst	W'dell/Goshe	364.00 Dys E Develop User Assessment Module		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0

## Exhibit C.1 (Cont'd)

Project: sdspln86

3-Jan-1986

Page 2

Name	Responsible Code	Duration Description	Slack	Start date	Finish date	% Complete
			364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
MFEMaint	J.Wardell	260.00 Dys E Maintain MFE Operating System	104.00 Dys E	1-Oct-1985 12:00PM	18-Jun-1986 12:00PM	0
MFEDBdsgn	Wiles/WWB	Design Mission Profile Data Base	364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
PRJAUTH1	R.Wiles	First PROJAUTH Update	364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
PRJAUTH2	R.Wiles	Second Update of PROJAUTH	364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
EPFSEB	L.Crone	Maintain/Process EPFS DB	364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
IDRCExch	J.Wardell	Exchange IDRC Data Bases	364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
ReqDes 2		Develop/Design Requirements for Phase II: Online Ordering System	364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
PC LAN	How'd/Eohall	Analyze/Recommend PC Local Area Network for CDIE	120.00 Dys E 4.00 Dys E	1-Oct-1985 12:00PM	29-Jan-1986 12:00PM	0
SchdUpdt	Phillips	Develop Schedule for Mailing List Updates	364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
ComIndx4	R.Wiles	Produce 4thQrtly CDM Indexes	363.00 Dys E 1.00 Dys E	1-Oct-1985 12:00PM	29-Sep-1986 12:00PM	0
OnLineOr	Wardell/User	Develop OnLine Ordering Module	364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
Security	J.Wardell	Maintain Security of DIS/HP System	363.00 Dys E 1.00 Dys E	1-Oct-1985 12:00PM	29-Sep-1986 12:00PM	0
LoadMFDB	Wiles	Load Mission Profile Data Base	364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
Impl'mnt	ToBeDecided?	Implement Plans for Automating AID Library	364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
Loans	Wolter/Betts	Analyze LOANS System Requirements	364.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
EPFSRpts	L.Crone	Prepare, Issue Quarterly Reports from EPFS	104.00 Dys E	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0

Exhibit C.1 (Cont'd)

Project: sdqpin86

3-Jan-1986

Page 3

Name	Responsible Code	Duration Description	Slack	Start date	Finish date	% Complete
CardCat	Wolter/Betts	364.00 Dys E Develop Plans to Convert Card Catalog		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
DCLCConv	Wolter	364.00 Dys E Plan for Converting DCLC Tape of AID Materials to CATALOG		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
SysDoc	Wiles/Ward'l	364.00 Dys E Maintain System Documentation		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
		364.00 Dys E		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
		364.00 Dys E		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
Upgrade	J.Wardell	210.00 Dys E Perform Upgrade Cost/Benefit Analysis	154.00 Dys E	1-Oct-1985 12:00PM	29-Apr-1986 12:00PM	0
RQSTRD	Phillips	364.00 Dys E Maintain/Update RQSTRD Mailing List		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
Training	Goshen	260.00 Dys E Provide System Support Training As Required	104.00 Dys E	1-Oct-1985 12:00PM	18-Jun-1986 12:00PM	0
Thes'dct	Imh'tz/Warde	260.00 Dys E Update Thesaurus once F.01 is operational	104.00 Dys E	1-Oct-1985 12:00PM	18-Jun-1986 12:00PM	0
DemoDL 2		364.00 Dys E Demonstrate Phase II: Online Ordering System		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
MergeDBs	War'11/LC/KC	364.00 Dys E Develop Plan to Merge GeoBureau files with DDCRD		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
S&T DB	Clarke/Drone	364.00 Dys E Design/Develop Data Base for S&T File Conversion		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
MFDBRets	Wiles/ToBe?	364.00 Dys E Prepare, Issue Quarterly Reports from Mission Profile Data Base		1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
MicroTrn	Goshen/How'd	120.00 Dys E Develop Training Module for MicroDIS	124.00 Dys E	1-Oct-1985 12:00PM	29-Jan-1986 12:00PM	0
OnLinHlp	How'd/Bohall	120.00 Dys E Develop OnLine Help Facility for MicroDIS	94.00 Dys E	1-Oct-1985 12:00PM	29-Jan-1986 12:00PM	0
AcqTrack	How'd/Bohall	120.00 Dys E Develop Acquisitions Tracking Module for MicroDIS	124.00 Dys E	1-Oct-1985 12:00PM	29-Jan-1986 12:00PM	0
F.01Inst	J.Wardell	180.00 Dys E Analyze, Install MINISIS F.01 when ready	184.00 Dys E	1-Oct-1985 12:00PM	30-Mar-1986 12:00PM	0

## Exhibit C.1 (Cont'd)

Project: sdgpln86

3-Jan-1986

Page 4

Name	Responsible Code	Duration	Slack	Description	Start date	Finish date	% Complete
MnthRpts	Wiles/Wiles	364.00	Dys E	Prepare, Distribute Monthly Operational Reports	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
COMIndx1	R.Wiles	1.00	Dys E	Prepare, Issue COM Indexes as specified	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
COMIndx3	R.Wiles	1.00	Dys E	Create/Produce 3rdQuarterly COM Indexes	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
Maintain	Phillips	364.00	Dys E	Maintain Mailing Lists	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
Modify	L.Crone	364.00	Dys E	Modify GeoBureau Data Bases as needed	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
COMIndx2	R.Wiles	1.00	Dys E	Create/Produce 2ndQuarterly COM Indexes	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
ReqDesig	JohnD/JWard	364.00	Dys E	Design Phase I: Online Order System	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
UDefLink	Gosnen/Ward	364.00	Dys E	Develop User Defined Links to Specific Data Bases	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
Implmnt	Wardell	364.00	Dys E	Implement Phase I: Online Ordering System	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
DemoOnLi	Wardell	364.00	Dys E	Demonstrate Phase I: Online Order System	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
LinkOrdR		364.00	Dys E	Establish Links between MailList and ORDERRD	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
HW/SWEva	Wiles/Wardel	180.00	Dys E	Evaluate, Report on HW/SW Requirements	1-Oct-1985 12:00PM	30-Mar-1986 12:00PM	0
RECIPRD	Phil'ps/Wile	364.00	Dys E	Update Recipient DB	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
ElimEVAL	Wiles/Wardel	364.00	Dys E	Merge/Eliminate Maintenance of EVALRD as Sep DB	1-Oct-1985 12:00PM	1-Oct-1985 12:00PM	0
MENUDIS1	R.Wiles	186.00	Dys W	Implement MENUDIS	13-Jan-1986 12:00PM	30-Sep-1986 12:00PM	0
Implment	Wiles/Wardel	260.00	Dys E	Implement MenuDIS System	13-Jan-1986 12:00PM	13-Jan-1986 12:00PM	0
UserDisc	How'd/Bohall	150.00	Dys E	Develop User Manual Display	29-Jan-1986 12:00PM	28-Jun-1986 12:00PM	0

## Exhibit C.1 (Cont'd)

Project: sdpaln86

3-Jan-1986

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Name	Responsible Code	Duration Description	Slack	Start date	Finish date	% Complete
TapeConv	Wiles/Suit	120.00 Dys E Convert WANG Tapes from USAID/Cairo	4.00 Dys E	29-Jan-1986 12:00PM	29-May-1986 12:00PM	0
TutorDis	How'd/Bohall	120.00 Dys E Develop Tutorial Display for MicroDIS	124.00 Dys E	29-Jan-1986 12:00PM	29-May-1986 12:00PM	0
UserStat	How'd/Bohall	120.00 Dys E Develop User Statistics Module for MicroDIS	124.00 Dys E	29-Jan-1986 12:00PM	29-May-1986 12:00PM	0
report	R. Wiles	110.00 Dys W Submit Report on Performance/C-E Studies		29-Apr-1986 12:00PM	30-Sep-1986 12:00PM	
approve	FPC/CDIE/DI	154.00 Dys E CDIE/DI Approves Report Plans		29-Apr-1986 12:00PM	29-Apr-1986 12:00PM	0
IRMCoord	Wiles/Howard	154.00 Dys E Coordinate Plans with IRM Prior to Implementation		29-Apr-1986 12:00PM	29-Apr-1986 12:00PM	0
LoadFile	How'd/Bohall	120.00 Dys E Upload/Download Cairo Files onto Diskettes	4.00 Dys E	29-May-1986 12:00PM	26-Sep-1986 12:00PM	0
CairoIns	Howard	2.00 Dys W Install MicroDIS in USAID/Cairo		26-Sep-1986 12:00PM	30-Sep-1986 12:00PM	
Revise	How'd/Bohall	4.00 Dys E Make Revisions to MicroDIS following Installation		26-Sep-1986 12:00PM	26-Sep-1986 12:00PM	0
UpDnLoad	Howard/VVB	4.00 Dys E Upload/Download Files for Processing on DIS and MicroDIS		26-Sep-1986 12:00PM	26-Sep-1986 12:00PM	0
End		1.00 Dys W		29-Sep-1986 12:00PM	30-Sep-1986 12:00PM	

### C.1.3 SDG Goals and Tasks: FY1986.

During FY86, the SDG proposes to undertake the following activities:

- System Maintenance and Upgrades
- MENU System Enhancements
- Automated Library
- AID/DIHF Profiles.
- Mailing List File Development.
- SDG MICRODIS Enhancements.
- Automation of Pre-Publication Processes.
- Technology Reviews.
- Document Tracking System.
- Acquisitions/Project Data Integration.
- Data Base Integrations.
- OCLC and Other Data Base Conversions..
- Distributions of COM Indexes.
- Cario Tape Conversions.
- Unspecified, Quick-Response Support

#### C.1.3.1 Task Analysis - System Maintenance and Upgrades

C.1.3.1.1 Requirements Summary. SDG will continue maintaining 100 MINISIS data bases and their related B-trees, print formats, and stream jobs. In addition, the SDG will maintain over 200 computer programs written in the COBOL language, 10 to 20 IMAGE data bases, and will upgrade the operating system and other commercial software as it becomes available.

The SDG staff will to maintain security software and account control in accordance with the requirements of AID/DIHF. They will provide for the daily, weekly, and monthly back-ups of computer files and data.

The SDG staff will conduct scheduled reviews of statistical reports indicating the uses of CPU time and other computer resources. The staff will identify problems and recommend improved processes. They will recommend equipment and/or software acquisitions, implement changes in resource allocations, and resolve equipment and/or software malfunctions.

SDG must assess HP equipment requirements to analyze conditions, and determine if an upgrade of the Series 3000 scheduled for FY87 is warranted. Experiences with the use of the /37, and information from HP indicating that four disc drives, two printers, a tape drive, and word processing terminals have to be discontinued will be considered in this analysis.

The scope of this task is determined more by external factors than any other SDG task. The increased use made of DIHF computer resources has brought with it a significant requirement for data base administration functions. Among

these functions are those establishing common data base processes and integration opportunities.

To address these opportunities, SDG will recommend policies for consolidating data base development where common functions are being served, e.g. draft document tracking and mailing list distributions. SDG will analyse and review requests for changing data base structures and assess their compliance with established AID/DI information processing standards and policies.

This task will be the basis upon which many other SDG tasks are or will be performed. Thus, it is the first priority of all SDG tasks.

C.1.3.1.2 Schedule.

- |     |   |                |
|-----|---|----------------|
| (a) | HP Benchmark Report.                        |                |
|     | - Design                                    | Dec. '85       |
|     | - Implementation                            | 12/28/85       |
|     | - Report of Findings                        | 1/15/86        |
| (b) | HP/48 Performance Analysis.                 |                |
|     | - Table of Contents                         | 1/20/86        |
|     | - Report                                    | 2/28/86        |
| (c) | HP Upgrade Analysis.                        |                |
|     | - Table of Contents                         | 2/20/86        |
|     | - Draft Report                              | 4/15/86        |
|     | - IRM Recommendations                       | 5/15/86        |
| (d) | Cost/Benefit Analyses.                      |                |
|     | - HP/150 Download                           | 3/15/86        |
|     | - Others (e.g. PC/LAN)                      | TBD            |
| (e) | Data Base Administration.                   |                |
|     | - Recommended Conventions                   | 4/15/86        |
|     | - Recommended Strategies for Implementation | 5/30/86        |
|     | - Data Base Reviews (by application area)   | Quarterly      |
| (f) | IRM Coordination.                           |                |
|     | - Drafts of DIHF Positions (A/R)            |                |
|     | - Other Unscheduled Requirements (TBD)      |                |
| (g) | Ongoing SDG Operations                      |                |
|     | - Backup of Files                           | Daily          |
|     | - Review of Utilization Reports             | Monthly        |
|     | - MINISIS Space Management Operations       | Daily          |
|     | - User requests/problems (A/R)              |                |
| (h) | MINISIS F.01 Updates.                       |                |
|     | - F.01 Updates                              | Oct. and March |
|     | - Thesaurus Conversions                     | Oct. and March |
| (i) | MPE Update to T/Delta/2                     | 12/13/85       |
| (j) | Computer Program Modifications.             |                |
|     | - MENUDIS                                   | Jan. and June  |
|     | - Bureau Programs (e.g. S&T)                | TBD            |
|     | - Rewrite SPL Intrinsic                     | 7/31/86        |
|     | - Other (A/R)                               | TBD            |
| (k) | Systems Documentation.                      |                |
|     | - SDG Operations Manual                     | 6/30/86        |
|     | - DIHF Users Manual                         | TBD            |
|     | - DIHF Programmers Manual                   | TBD            |

- DIHF Applications Overviews  
(1) MINISIS F.01 Changes: Impact on Users

Quarterly  
4/30/86

C.1.3.2 Task Analysis - MENU System Enhancements

C.1.2.1.1 Summary of Requirements. The SDG staff is to develop an Online Ordering System in two phases:

- (a) Phase 1 will provide capabilities for users to request specific AID documents while online with the AID/DIHF MENUDIS computer system. After selecting an option to order documents that were found, a user will be presented with a display of the quality characteristics of documents, (e.g. whether film copies exist) that were found. The system will then validate requests and transmit orders to the User Services Group of the AID/DIHF for fulfillment.
- (b) Phase 2 of the Online Ordering System will begin its processing with the order transaction. It will provide capabilities for tracking orders that have been made (partial and complete), and preparing invoices.

Other MENU enhancements include adding the capabilities for choosing two print and browse formats, creating two or more versions - each providing accesses to different data bases, and adding the capability for reporting assessments of user experiences with the system and its features.

The design and development of this system may incorporate features of other existing systems, as appropriate, e.g. the Marigold Library System which claims to provide online invoicing and inventory control processes.

C.1.3.2.2 Schedule.

(a) MENUDIS implementations.

- |                                 |                 |
|---------------------------------|-----------------|
| - DIHF Staff                    | Dec. '85        |
| - Bureaus                       | Dec. '85        |
| - Research Staff                | Dec. '85        |
| - AID Library Staff             | Jan. '86        |
| - Other AID Components ...      | Feb. - Jun. '86 |
| - General Public at AID Library | Jun. '86        |

AID user groups will be established and distributed in coordination with the MENUDIS training program scheduled to begin in January 1986.

(b) MENUDIS enhancements (pre-public/post-public) Jan/Jan

- (c) Online Ordering System: Phase 1.
  - Design recommendations. 4/30/86
  - Demonstration 7/15/86
  - Implementation 9/30/86
- (d) Online Ordering System: Phase 2.
  - Design recommendations. 6/30/86
  - Demonstration 8/31/86

#### C.1.3.4 Task Analysis - Automated Library System

C.1.3.4.1 Summary of Requirements. The SDG staff is to develop an Automated Library System for use at the AID Library. The library requirements will be reviewed and coordinated with AID technical staff, and SDG will implement software in response to these requirements.

Card Catalog, Loans, and Serials functions will be analysed, and the feasibility of bar coding library holdings assessed. The SDG staff will review the applicability of incorporating existing library systems or system modules. The KARDEX and LOANS systems of Agralin, Wageningen, and the Toronto Public Library System will be reviewed.

The design of the Automated Library System will be coordinated with the development of the Online Ordering System and other related AID/DIHF systems. The three files of the LOANS system (borrower/item/title) from Wageningen will be reviewed to determine their applicability.

The scope of the development for an Automated Library System will be significantly affected by three factors: whether it is determined that AID Library holdings are to be bar-coded; the applicability of other existing library systems; and the integration potential of the system with other existing and/or proposed AID/DIHF systems.

#### C.1.3.4.2 Schedule

- (a) Library Requirements Document. 7/31/86
- (b) Library Design Document. 9/30/86
- (c) Automated Library System Implementation FY87

#### C.1.3.5 Task Analysis - AID/DIHF Profiles:

Mission Profiles  
Mission Library Profiles

C.1.3.5.1 Background. This is a task responding to the need for AID/DIHF to develop strategies that provide ongoing assessments of the effectiveness of AID/DIHF services and which identify opportunities for new and improved services to the AID missions. It is conceived with a goal of describing each AID mission's environment in greater detail, providing AID/DIHF policy

formulation with abilities to better target services for individual mission requirements.

AID/DIHF profile information will focus on describing each mission and its staff components and active development programs. Regional offices will be included in the profile of missions. In addition, the profiles will identify other AID-related development activities and facilities in the vicinity of the missions.

One of the benefits of mission profiles is the information will provide AID/DIHF with a greater awareness of other development-related organizations (UN, PVOs, etc.), programs (Food-For-Peace, etc.), in their aggregate. As a result, AID/DIHF will have the basis for identifying opportunities for coordinating the distribution of development information and allocations of resources and equipment.

The SDG staff is to develop and maintain data bases with information which can be tabulated and cross-indexed to display profiles of AID missions and their environments.

- (a) Mission Organizations.
  - Information recorded in AID Mission Directories, e.g. contractor and staff component sizes, and other development-related information. DIHF has profile data for nearly 71 missions and several mission libraries.
- (b) Mission Libraries.
  - Information from AID Mission Library Survey sheets, and other appropriate and available resources.

The requirements of these profiles will be refined as the AID/DIHF user community experiences their use.

#### C.1.3.5.2

- |  |         |
|--|---------|
| (a) Design of Profile Data Base.           | 6/30/86 |
| (b) Load of Profile Data Base Data.        | 8/31/86 |
| (c) Quarterly Profile Reports and Analyses | 9/30/86 |

### C.1.3.6 Task Analysis - Mailing List Data Base Development

C..1.3.6.1 Summary of Requirements. The SDG staff will provide the AID/DIHF with computer capabilities for targeting its mailing to AID organizational components and missions, as well as other appropriate development communities. Among the target groups identified at this time are:

- (a) Organizations which are designated to receive ARDA and other CDIE publications.
- (b) Organizations which are designated to receive all programmatic and/or technical AID distributions.
- (c) Organizations which are designated to receive all AID distributions relating to a country and/or sector.
- (d) Other appropriate development institutions.

The following has been developed, or is planned to be developed, in response to AID/W target mailing needs:

- (a) RECIPRD data base. This data base was created in FY85 with organizations appearing in AID/W and AID/M (Hq) (March '85) telephone directories.
- (b) EVALRD data base requirements are planned to be incorporated in either RECIPRD or REQUESTR.
- (c) RECIPRD is to be modified, if necessary, to accommodate on-line ordering system requirements.
- (d) REQUESTR data base will contain AID subscriber data for AID publications, e.g. ARDA and the Farming Systems Bibliography. AID/W and AID/M records may be removed.
- (e) ORDERRD data base will be modified to accommodate on-line ordering system requirements.

The SDG will coordinate with DIHF/User Services to provide the maintenance and development of mailing capabilities required by the AID/DIHF.

#### C.1.3.6.2 Schedule.

- (a) RECIPRD Format Changes 12/20/85 and 9/30/86
- (b) REQUESTR Format Changes 9/30/86

**C.1.3.7 Task Analysis - SDG MICRODIS Enhancements.**

**C.1.3.7.1 Summary of Requirements.**

SDG has tested the applicability of MICRODIS to mission requirements in Cairo, Egypt. Comment was received and modifications are being made to the system in response to the comment. A Circulation module has been added to the system. An installation of MICRODIS in Cairo is planned March 1986.

MICRODIS enhancements planned for the calander year 1986 include the development of performance criteria, and:

- (a) Developing online MICRODIS tutorial display.
- (b) Preparing a comprehensive Users Manual.
- (c) Establishing a MICRODIS training program.
- (d) Developing online HELP facility.

As required, additional modules will be added to the system, e.g. Acquisition Tracking, User Statistics, etc. as well as establishing backup mechanisms for Cairo and other future users.

SDG will investigate alternatives for developing and refining PC-based Local Area Networks for AID mission environments using MICRODIS. The investigation will address small-scale networks of ten or less stations.

**C.1.3.7.2 Schedule.**

- (a) Online MICRODIS Tutorial Display.....3/31/85
- (b) MICRODIS Users Manual.....3/31/85
- (c) MICRODIS Training Program.....3/31 - 9/30/85
- (d) Online HELP Facility.....3/31/85
- (e) Acquisition/Circulation/User Statistics.....3/31/85
- (f) Multi-language support.....TBA
- (g) Cost-Benefit Analysis of Local Area Network opportunities..... 1/01/85

C.1.3.8 Task Analysis - Automation of Pre-publication Processes.

C.1.3.8.1 Summary of Requirements.

SDG will develop methodologies for enhancing the quality of publications by downloading abstracts and other data from DIS data bases to PC-based hardware, and preparing camera-ready copy on the Laser-Jet printer. Automation of monthly Acquisition List reports will be developed as a first step toward evaluating the feasibility and techniques for automating other CDIE publications.

C.1.3.8.2 Schedule.

- (a) Automation of Acquisition List
- (b) Feasibility Study Document
- (c) Automation of other publications as required.

C.1.3.9 Task Analysis - Technology Reviews.

C.1.3.9.1 Summary of Requirements.

SDG will perform ongoing assessments of the feasibility of new technologies for the AID/DIHF requirements. For example, developments in the laser and optical disk technologies will be reviewed during the year to determine their applicability for AID/DIHF storage.

C.1.3.9.2 Schedule.

SDG will perform this task throughout the year. As improvements are identified they will be analysed and coordinated for appropriate review.

C.1.3.10 Task Analysis - Draft Document Tracking Requirements.

C.1.3.10.1 Summary of Requirements.

SDG is developing a data base for specific CDIE/PPE draft document tracking requirements in a format appropriate for tracking all or nearly all other CDIE draft document development. Attempt is also being made to incorporate reporting capabilities applicable to tracking CDIE Publication Series and other CDIE draft documents.

C.1.3.10.2 Schedule. ((a) - (d) are services for CDIE/PPE)

- (a) FY85 Evaluation Report Dec. '85
- (b) FY86 Sample Evaluation Plan Report 12/16/85
- (c) FY86 Annual Evaluation Plan Report 1/31/86
- (d) FY86 Evaluation Tracking Reports Apl and Jul 86
- (e) Other CDIE tracking capabilities, as required.

C.1.3.11 Task Analysis - Acquisitions/Project Data Integration.

C.1.3.11.1 Summary of Requirements.

A requirement has been identified for developing capabilities to acquire AID project information missing from the AID/DIHF. Existing procedures for updating PROJAUTH are to be implemented twice. Additionally, ways are to be investigated for obtaining more timely project budget and planning data from the AID/W data bases.

C.1.3.11.2 Schedule.

- (a) Update PROJAUTH data base. (1 week/each)  
Jan and Jul 86
- (b) Investigate Improved Update Methodologies. Jun 86

C.1.3.12 Task Analysis - Data Base Integrations.

C.1.3.12.1 Summary of Requirements.

The AID/DIHF Five-Year Plan identifies a requirement for integrations of DOCR and CATALOG data bases; and the integrations of BUREAU and PROJRD data bases.

C.1.3.12.2 Schedule.

- (a) Requirements Analysis. TBD
- (b) Design Document. TBD
- (c) Implementation. TBD

C.1.3.13 Task Analysis - OCLC and Other Data Base Conversions.

C.1.3.13.1 Summary of Requirements.

The AID/DIHF Five-Year Plan identifies a requirement for conversions of bibliographic information from the Online Computer Library Center (OCLC) located in Dublin, Ohio, and conversions of National Technical Information System data from the U.S. Department of Commerce. A review of IMF OCLC processes will be made.

C.1.3.13.2 Schedule.

- (a) Requirements Analysis. TBD
- (b) Implementation. TBD

C.1.3.14 Task Analysis - Distributions of COM Indexes.

C.1.3.14.1 Summary of Requirements.

SDG will continue the scheduled preparations of COM Index for Cairo and other requesting missions.

C.1.3.14.2 Schedule.

Months following completion of each quarter.

(April/July/October/January)

C.1.3.15 Task Analysis - Cairo Tape Conversions.

C.1.3.15.1 Summary of Requirements.

SDG will write computer programs for converting two tapes belonging to the Cairo mission, and:

- Create MINISIS data bases which will be downloaded to MICRODIS format; and,
- Convert Cairo terms which are believed to mostly be in RANDD format, to AID-thesaurus descriptors.

C.1.3.15.2 Schedule.

- |                                       |          |
|---------------------------------------|----------|
| (a) Create MINISIS data bases.        | Jan. '86 |
| (b) Complete two conversion programs. | Jan. '86 |
| (c) Convert unmatched terms.          | Feb. '86 |
| (d) Download to MICRODIS format.      | Mar. '86 |

C.1.3.16 Task Analysis - REQUEST data base format changes.

C.1.3.16.1 Summary of Requirements.

SDG will modify the present format of the REQUEST data base, providing capabilities for the Reference Staff to track their activities.

C.1.3.16.2 Schedule.

January/February 1986

C.1.3.17 Other.

C.1.3.17.1 Summary of Requirements.

- Upload/download files, as required.
- Convert DP Editor to/from HP Word files, as required.
- Prepare tapes for microfiche ... exchanges, as required.
- Develop UDCs and tables, as required.
- Rewrite (20) DIHF/SPL intrinsics.
- Electronic Mail Development,
  - Investigate feasibilities -
  - Prepare requirements/design analyses -
  - Test and implement -

. . .

C.1.3.17.2 Schedule.

As required.

## C.2 ACQUISITIONS

The acquisition of A.I.D. project and technical documents is a critical prerequisite to the functioning of all other CDIE activities. Beginning in June of 1985, the DIHF assumed the responsibility formerly held by A.I.D. for selecting and acquiring the documents that comprise the Development Information System (DIS). In the past, many key types of documents have not been acquired for the DIS. As a result, a number of projects lack design documents, and some lack any documents at all.

FY 85 goals for the Acquisitions unit were to facilitate the transfer of the acquisitions function from CDIE to the DIHF and to develop a comprehensive, proactive system for tracking and acquiring A.I.D.-generated publications. Additionally, 200 project and 200 technical documents were to be acquired monthly for the remainder of FY85.

Also in FY85, the DIHF was responsible for acquiring non-A.I.D. publications requested by CDIE as well as for maintaining subscriptions to a large number of serials for the A.I.D. Library.

### C.2.1 FY 1985 Accomplishments

#### C.2.1.1 Acquisition of AID materials

During the three full months the DIHF had responsibility for operations, 1813 documents were recieved. Of these, 648 project documents and 649 technical documents were processed onto the DIS; the remainder were duplicates. Quotas for project and technical documents were surpassed. Document sources were divided as follows:

Contractors	29%
Asia/NE	22%
Missions	12%
Print Shop	7%
S & T	5%
Africa	4%
LAC	1%
Others	7%
Unidentified	13%

These statistics indicate areas for improving submission of documents both in AID/W and USAID's around the world.

Mailings and all other contacts with the field, AID/W and contractors are seen as outreach opportunities for CDIE. It is important to remind CDIE users of ways in which CDIE can help them and how contributing materials to DIS will:

- improve the entire Agency's information base
- improve individual country information available
- provide publicity for the contractors responsible for the documents

Quality duplicates of recent origin received at the DIHF will be sent to missions or other development organizations or will be returned to the sender to show our concern for saving them printing costs. The experience of Acquisitions indicates that the Unit has multiple roles to play and is dependent upon and supportive of outreach and order fulfillment. Best acquisitions contacts are often a follow-up to a contact with Research Services or after receiving materials from the DIHF. Having seen the value of CDIE services first-hand, users are especially willing to supply documents to contribute to the DIS in support of our operations. Further, when contacts are reached in connection with acquisitions matters, they invariably express their questions, problems and opinions of CDIE and its extensions (ARDA, etc.). These opportunities are needed to link CDIE to its user communities.

Tasks undertaken in 1985 included performing some of the ground work necessary before undertaking more comprehensive acquisitions approaches. Evaluation schedules were received from all bureaus and compared against the data base to identify omissions. Lists of project officers for current, active projects for many bureaus and offices have been as a basis for performing mailings to solicit missing documents. Contacts in as many offices as possible have been established and cultivated for future cooperation. A schedule of each mission's Action Plan activities was developed.

An effort was begun to establish a document contact person for each mission. Questionnaires to enable profiles for each mission and its information services to be developed were sent to contacts established previously. Correspondence from CDIE requested mission directors to designate a contact for their mission. After responses are received, follow-ups will be sent by the CDIE Director. The DIHF will develop a list of contacts from these responses for use in subsequent Contacts.

Regular procedures were routinely followed to identify and acquire materials. These included scanning bibliographies, examining publications received for clues to other documents on the same project, following-up on requests for specific titles identified by CDIE or the DIHF and scanning A.I.D. and non-A.I.D. periodicals. In addition to these routine procedures, more systematic approaches were also conducted. Two mailings were completed, one involving all current S&T projects and the second mailing focusing on D.C. metro area contractors. Results from both mailings indicated a need for follow-up.

#### C.2.1.2 Acquisition of Non-AID Materials

The following items were ordered and received: 226 non-AID publications at a cost of \$15,171.06; 180 serials titles at a

cost of \$20,962.39; 441 subscriptions to 9 Population serials at a cost of \$10,232.50; and a complete set of FAO microfiche at a cost of \$2,000.00. Serials were renewed on a timely basis and, where possible, discounts for prepayment were utilized. The SERIALS database was modified to include fields for tracking claims made to vendors or publishers for issues not received. The fields indicate the date a claim was made, the issue not received, and the date the issue was finally received. A vendor number field for identifying a serial title was added to facilitate the ordering and claiming of titles from vendors. A date entered field was also added for tracking purposes.

### C.2.2 FY 1986 Goals and Objectives

#### C.2.2.1 Acquisition of A.I.D. Materials

During FY 86, systematic activities will be implemented to ensure that the acquisitions effort will meet the requirements set by A.I.D. The objective is to develop an operational model which will enable the Acquisitions Unit to function effectively and proactively in the future. By receiving documents as they are released, and when possible anticipating their issue, the Unit will provide the quality current materials necessary to ensure A.I.D.'s institutional memory and will help to eliminate the problem of retrospective acquisitions which has seriously limited the assembling of complete project documentation. (Discussed earlier in Section 1 as part of proposed Acquisitions Data Base).

Cooperation with SER/MO's acquisitions effort to obtain core project file materials is a key part of the acquisitions plan. The implementation of a single, coordinated program would avoid needless duplication of effort and allow both offices to benefit from each other's sources of materials. A total of 299 key documents were pulled from the Geobureau data bases for inclusion in DIS during FY 1985.

Many documents are produced in the field and are never received and logged in in Washington. Under the planned reorganization of the Agency, the responsibilities for the preparation, oversight, and/or dissemination of more documents is to be shifted increasingly to the field. This makes direct mission contact critical. An important source of information on anticipated publications from the field will be the mission's Action Plan and Program Week review.

Essentially, the DIHF acquisitions plan involves contacting three different sources for each active project during the FY: the project officer in AID/W, the mission which is participating in the project and the contractor who is responsible for the project. A regular schedule of mass mailings will be conducted during the year. This schedule has been planned to avoid busy times for particular Agency personnel in so far as this is possible:

- 1) S&T follow-up mailing (Nov)
- 2) Projects without documents (about 1000) (Nov - Jan)

- 3) Projects ending FY 85 (Jan - Mar)
- 4) Large contractors (apx. 200) (Mar)
- 5) Other contractors (Apr - July)
- 6) Project lacking design not contacted in #2 (June - Aug)
- 7) Missions (contacted on an individual basis during the year)
- 8) S&T, F/PVA and PE (June - Sept)
- 9) Projects ending FY 86 (Sept)

Each mailing will include a cover letter, a printout of documents we have on the system for that project and a brochure on CDIE. These mailings will be instituted on an annual basis with follow-up to non-respondents after several months. All positive responses will be acknowledged in a timely fashion.

Several other projects will be undertaken during the year:

- 1) January - June, 1986. A list of all A.I.D. tracking systems that can be identified will be prepared. A major problem facing Acquisitions is the lack of a single source which tracks all Agency publications. The schedule of publications in the Action Plans will also be coded and this information will be entered into an online tracking system in cooperating with PPC/E.
- 2) January, 1986. A complete systems analysis will be conducted after the first six months of Acquisitions operation as a contract function to identify potential improvements which could be made in the system and implement those changes.
- 3) June - August, 1986. Develop a promotional plan for the Acquisitions Unit within AID/W, USAID and with contractors. As more materials are sent regularly through active contacts, the regular update mailings will be more manageable.
- 4) June, 1986. A complete systems analysis as in #2 after the first year of operations of Acquisitions as a contract function.
- 5) September, 1986. Prepare a list of existing A.I.D.-funded clearinghouses and specialized information center collections.
- 6) September, 1986. Complete a study using several mission countries in AFR and ANE comparing the documents in the SER/MO and DIS data bases to determine (1) desired overlap and (2) percentages missing from one system that should be on both systems.

#### C.2.2.2 Acquisition of Non-AID Materials

During FY86 a computer-generated purchase order form will be created to enable better tracking of requests for serials as well as speedier ordering. Written guidelines will be developed for

serial exchange agreements and follow-ups will be made to claim these serials. Interlibrary loans will be checked to identify frequently ordered serial titles for potential inclusion in the A.I.D. Library serials collection.

### C.3 PROCESSING

Processing involves the following four activities which are discussed below:

- C.3.1 Cataloging
- C.3.2 Abstracting/Indexing
- C.3.3 Thesaurus Maintenance

#### C.3.1 Cataloging

The Cataloging unit currently (and for most of FY85) consists of a staff of six persons--three full-time and three part-time (30-32 hours per week) employees. One position is devoted to proofing/quality control of the DOCUMENT, CATALOG, INSTDS, and SERIALS databases; one person catalogs non-A.I.D. commercial documents; one person maintains the SERIALS database, and is responsible for non-A.I.D. acquisitions; the remaining three staff members devote their time to cataloging, control, and clean-up of A.I.D. documents and records.

Cataloging of A.I.D. materials is divided between the DOCUMENT database (newer materials which are fully cataloged and filmed) and INVRD or Inventory database (which contains older, lower-priority A.I.D. documentation). DOCUMENT records are created from a possible total of 102 fields, entered according to AACRII cataloging rules. A minimum of 10 fields must be used. During the past year, INVRD was upgraded from 6 to 11 fields

The duties of the A.I.D. document catalogers are by no means limited to entering records. Ancillary activities include sorting and analyzing documents, discarding duplicates, and routing documents to filming, abstracting/indexing, and finally, to storage. Routing of cataloged documents requires an average of three person days per month. Searching the Geobureau databases for needed documentation has also become a function of the A.I.D. document catalogers.

#### C.3.1.1 FY85 Accomplishments

##### C.3.1.1.1 A.I.D. Document Cataloging

From October 1, 1984 through September 30, 1985, the cataloging unit processed a total of 4,781 A.I.D. documents (2,180 PD's, 141 XD's, 2,589 PN's, and 12 PC's). Cataloging on INVRD totalled 3,011. Also the INSTDS (institutions) database, used in conjunction with DOCUMENT, was maintained and enlarged.

A total of 7,051 records were modified during the year. Most of those modified represent cataloging of a collection of skeletal BREF records known as microfiche inventory records. Also, some select collections of records were globally modified. For example, 276 BREF/RANDD records which displayed "A.I.D." in the institution field were updated to include the specific A.I.D. bureau and office responsible for the document. Cataloging

guidelines for the "Ancillary Notes" (B820) field were changed to conform to AACRII. As a result, 121 records with the word "thesis" or "dissertation" were modified, 800 records with the work "edition" were changed to "ed.", and 27 contents notes were modified for punctuation. Approximately 70 BREF/RANDD records requiring parallel language titles were modified. In addition, project numbers missing from 1,036 records for documents produced by A.I.D.-supported international research institutions (CGIAR group) were modified to include those numbers. The modification total also includes individual records with errors or problems channeled to us from the DIC, CDIE, or in-house. B-number records (records without DOCID's and, therefore, non-retrievable) have been reduced to 1,367.

Efforts have continued to eliminate the backlog of stored documents shipped to the DIHF during the first contract period. Approximately 35 boxes were taken from storage and sorted during the fiscal year. For the most part, this effort did not translate into entry on DOCUMENT. Most of these materials proved to be duplicates, non-A.I.D. documents, and some older materials assigned to INVRD.

Special activities during the past fiscal year included duplicate checking and cataloging of special collections. For example, in February, nine boxes of documents sent from the S&T Bureau were sorted and checked against the DOCUMENT database. Those appropriate to and missing from DOCUMENT were culled out and processed. The remainder were returned to the S&T Bureau. In addition, eight boxes of evaluation documents were sent to us from the Near East Bureau in May. This task required title searching each document and providing a print-out of the record for each document found on the system. Uncataloged documents were photocopied, processed, and readied for return with the other documents.

Geobureau searching is both an on-going and a special activity. Beginning in January, 1985, the cataloging unit assumed responsibility for checking monthly print-outs of documents newly entered on the various Geobureau databases. The Geobureau records are checked against DOCUMENT, and fiche blow-backs are requested for those missing from DOCUMENT. (Records are then created using the Geobureau DOCID, and the documents are routed to indexing/abstracting.) In addition to the monthly checks of newly-entered Geobureau records, a retrospective search of all the Geobureau databases was carried out from April through July, 1985. This retrospective effort required a total of 84 3/4 person-hours.

Thus far, 290 documents have been taken from the Geobureau databases. From a rough comparison of the dates-entered for documents appearing on both the Geobureau and DOCUMENT databases, it appears that documents are received through normal acquisitions channels first. Although this source of documents should not be discounted, it should be noted that there are not as many usable documents on the Geobureau databases as an initial count by bibtype might indicate. Sought-after Geobureau bibtypes

include evaluation reports (83's), audits (84's), final reports (85's), project papers/PAAD's (26's), and project paper/PAAD amendments (27's). However, many documents labelled as evaluations, for example, may upon closer examination prove to be a one-paragraph memo or cable. Many listed as project papers are only facesheets. Nevertheless, we will continue to utilize this source as fully as possible.

#### C.3.1.1.2 CATALOG Database (non-AID Documents)

During FY85, 500 non-A.I.D. commercial documents were cataloged and processed into the CATALOG database. Of this total, 226 documents were orders, 86 were gifts, 178 were retrospective reference and 15 were backlog gift items. In addition, 131 call numbers were assigned to A.I.D.-sponsored documents and thus were added to DOCRd database.

During the first quarter of the year policies were changing, priorities were being established and communication channels were broadening. For instance, a major processing policy was changed in February 1985 which dramatically increased productivity of cataloging. Responsibility for assigning call numbers was shifted from A.I.D. to DIHF. Previously, documents were cataloged at DIHF then sent to A.I.D. where call numbers were assigned. After call numbers were assigned at A.I.D., the documents were returned to the DIHF where they were entered into the cataloging record online. This process proved to be very time-consuming. Once complete cataloging responsibility was shifted to the DIHF, processing and cataloging began to work more smoothly and efficiently.

In February 1985 new processing priorities were established in response to the changing needs of the library and to the large volume and variety of documents which began to come into the DIHF for cataloging. Priorities were set up as follows:

1. Orders
2. Retrospective reference
3. Gifts (most recent)
4. Backlog gifts

Processing of backlog gifts was halted in September 1984 due to the backlog of over 400 items which were being held in Rosslyn pending approval for addition into the A.I.D. Library. Approximately 430 documents with skeletal records on the CATALOG database were sent to A.I.D. for review. These documents were unable to be reviewed by A.I.D. until the third quarter of the fiscal year. Consequently, a moratorium on backlog gifts remained in effect until that time.

All orders received at the DIHF during the first quarter of the fiscal year were cataloged and, as communications improved between A.I.D. and DIHF, we began receiving retrospective reference books for inclusion in the CATALOG database as well. This enabled us to increase our statistics for monthly processing of non-A.I.D. documents.

By February 1985, the need for guidelines for cataloging serials became clear. In response, guidelines were established according to AACRII for cataloging open entry serials. These were accepted by A.I.D. in April 1985 and they were then put into use.

#### C.3.1.1.3. Serials (non-AID Documents)

During FY85 the SERRD database was joined with KPUB (a publisher KSAM file) to create the DS, SERIALS. The DIHF worked closely with the A.I.D. Library in order to substantially update and edit existing serials information. This effort improved the tracking of serials received at the library. It also improved the identification of A.I.D. produced and supported serials and serials received on an exchange basis. Additional serials information was acquired on serial title acronyms, publisher name and address, range of years A.I.D. has received a title, and the frequency with which a serial is issued. As a direct result of this effort, a bibliography of the A.I.D. Library serials was produced for A.I.D. staff use.

New fields were added to track claims made to either the vendor or publisher. They indicate the date the claim was made, the date the claimed issue was received, and which claimed issue was received. A second note field was added to capture miscellaneous data for the A.I.D. Library's internal use. The original notes field is used for capturing bibliographic data. A vendor number field for identifying a serial title was added as a requirement in ordering or claiming a title from a vendor. A date entered field was added for tracking purposes.

#### C.3.1.2 FY 86

##### C.3.1.2.1 A.I.D. Document Processing

A.I.D. document cataloging targets are again set at 5,000 records for DOCUMENT (2,500 PD's and 2,500 PN's) and 4,000 records for INVRD. We feel that these targets require closer examination. With regard to PD documents, we suspect that the number of projects implemented each year, and therefore, the number of documents produced have decreased over recent years. The INVRD cataloging goal may prove even more elusive. At the time the INVRD cataloging goal was set, there was an abundance of older project documents recently transferred from S&T/DIU and the A.I.D. Library at 1656 NS storerooms to the DIHF. That supply has been exhausted. Most of what is now pulled from the backlog increasingly turns out to be duplicates, non-A.I.D., or otherwise miscellaneous materials. Also, less PD documents are being assigned to INVRD. All design documents and major evaluations with project numbers appearing on PROJAUTH are now processed on DOCRD regardless of their publication date. The totals for the true universe of documents appear to be unknown. It can certainly be said that the availability of documents ebbs and flows rather than arriving in a steady stream. Until better data can verify that the target volumes can be met, we will continue to process current material and otherwise shift attention to backlog and database clean-up efforts.

For example, during the upcoming fiscal year, a determined and steady effort will be made to clear up the back-log of stored documents. At least two boxes per week will be pulled, sorted, and disposed of as required. The PPC/Evaluation library was recently added to our backlog of stored documents. This collection is being tackled first. Examination of the first few boxes reveals the familiar pattern of duplicates, non-A.I.D. documents, or miscellaneous materials. In addition to clearing away the backlog of stored materials, we recommend that our efforts in FY 86 focus on quality control, adherence to AACRII, and clean-up of incomplete BREF records. As described in the preceding pages, these activities have heretofore been carried out on a catch-as-catch-can basis. In the upcoming year, these records will be systematically examined as a group for quality control purposes. Global searches for authors/institutions absent has been selected as a first task and has yielded 850 records (excluding bibtype 99, miscellaneous.)

A second goal for the upcoming year is to resolve the remaining B-number records. These records include a significant number of records for non-priority bibtypes: 306 end-of-tour reports, 25 Congressional Presentations, 34 bibliographies, 88 undifferentiated reports, and 16 miscellaneous design documents--totalling 467. We recommend that these records be deleted. In addition, there are 678 B-number records with DIC numbers. We recommend that a concerted effort be made to obtain these documents from 105. Duplicate checking of the remaining B-number records against DOCUMENT could further reduce their number.

In response to both the limitations and additional tasks outlined above, we propose that a change in processing targets is in order. We believe that our efforts will be better directed if our goals more closely reflect the actual availability of priority material. This will permit us to respond more appropriately to changing needs and conditions. We recommend that the new yearly targets be set as follows:

BREFWORK	850 record modifications (most of which entail completing skeletal records of the remaining microfiche inventory records)
BACKLOG	70 boxes (doubles number sorted during previous FY)
BNUMBERS	900 B-number records resolved
PD DOCUMENTS	2,000 records
PN DOCUMENTS	2,500 records
INVRD	2,500 records
CATALOG	500 monographs
SERIALS	191 subscriptions (renewals)

Bibtotypes will be expanded to allow for more non-A.I.D. categories, for example, thesaurus, encyclopedia, dictionary, etc. Several A.I.D. document bibtotypes will also be added such as a State-of-the-art Review and an Economic/Social Analysis.

#### C.3.1.2.2 CATALOG database (non-AID Documents)

The goal for FY86 is again set for processing 500 commercial and non-A.I.D. documents for inclusion in the A.I.D. Library. This is expected to come from orders, gifts, and backlog gifts. Since there is little remaining to be processed of retrospective reference monographs and serials, a concentrated effort will be placed on processing backlog gifts being stored at the DIHF.

A major goal for FY86 is to establish new and more specific guidelines, according to A.I.D.'s needs, for the processing of gifts, e.g. date, subject, etc.

#### C.3.1.2.3 Serials

During FY86, 191 subscriptions will be renewed and a computer generated purchase order form will be generated for SERIALS. This will enable better tracking of requests for serials and the provision of speedier ordering. Also planned is the addition of serial holdings at the A.I.D. Library to SERIALS DS. Written guidelines will be developed for serial exchange agreements and follow-ups will be made for claiming these serials. Frequency of publication information will be supplied for all those serial titles lacking that data. Interlibrary loans will be checked by the A.I.D. Library for frequently ordered serial titles. These will be considered for inclusion in the A.I.D. Library serial collection. A better tracking system will be explored for newly published A.I.D. produced serials and newsletters. The DIHF will continue to work closely with the A.I.D. Library to provide and improve existing services as well as to meet any new requirements.

#### C.3.1.2.4 AACRII Improvements

Strict adherence to AACRII is the goal for A.I.D. and non-A.I.D. cataloging in FY86. This will effect punctuation in eight fields.

For B230 (title), B330 (generic title), B410 (series title), and B820 (ancillary data), a title will be separated from a subtitle with a space colon space, " : ".

For B641 (pagination) and B620 (free date), brackets will be used instead of parentheses.

In B820 (ancillary data), one space instead of two shall follow a colon, " : ", for notes.

Descriptions in B642 (collation) shall all appear in lower case. For B210 (author), a comma and space will proceed junior, ", Jr."

### C.3.2 Abstracting/Indexing

#### C.3.2.1 FY85 Goals

Abstracting: to prepare informative abstracts of A.I.D. documents in order to provide A.I.D. and other development professionals with accurate, concise information on the design, implementation, and evaluation of A.I.D. development assistance projects as well as with current information on the findings of AID-sponsored research. Additionally, to edit AID-supplied abstracts and to help implement a system for their routine preparation.

Indexing: to enable the retrieval of AID-generated project and technical information by assigning index terms which accurately identify document and project content.

Specific targets were as follows: abstract and index 1200 evaluative and technical documents (the latter to include 100 technical documents for a farming systems research bibliography) and 300 projects; index 4,300 project and technical documents; and edit 100 AID-supplied abstracts.

#### C.3.2.2 FY85 Accomplishments

Abstracts were prepared for 978 evaluative and technical documents, including 100 farming systems research documents, and for 355 design documents (including 155 amendments). Another 107 abstracts were added to the PROJECTS database only for a total of 1447 abstracts prepared at the DIHF, just slightly short of the target of 1500. A total of 139 author-supplied abstracts, slightly above the target number, were edited and added to the DIS. A total of 5,120 project and technical documents were indexed only, significantly more than the target of 4,300 documents.

Quality of abstracts produced remained high. All abstracts were fully edited for both content and adherence to strict grammatical requirements prior to being entered onto the DIS. Efforts initiated in early FY85 to develop a questionnaire for use in evaluating the quality and utility of abstracts became bogged down by difficulties in identifying the most appropriate group to be surveyed (requestors of documents or document authors) as well as problems in developing accurate indicators of abstract quality and utility.

During FY85, the abstracting unit experienced a high rate of staff turnover. Difficulty was also experienced in locating applicants with appropriate qualifications who were interested in the salary provided for the position in the FY85 budget. Thus the production levels discussed above were accomplished with fewer staff hours than projected (8418 actual vs. 10010 projected).

Abstracting/indexing priorities for FY85 were as follows: (1) design documents; (2) technical documents for ARDA; (3) current

PES's and Special Evaluations; (4) current Audit Reports and Final Reports; (5) older PES's and Special Evaluations; and (6) older Audit Reports and Final Reports.

Although FY85 abstract production was only 53 (4%) less than the target number, a large number of documents in the above categories remained unabstracted. This was due to the fact that the number of documents received in FY85 to be abstracted exceeded the scope of work requirement by almost 300. In addition, a backlog of approximately 200 documents was inherited from the previous contract. This excess supply of documents to be abstracted contributed to a high abstracting mean time. In order to mitigate the effects of this delay in abstracting documents, a policy was begun in mid-FY85 of indexing all documents immediately upon their arrival at the abstracting unit. This enabled users to do subject searches of documents which were in the process of being abstracted.

#### C.3.2.3. FY86 Goals and Objectives

Specific abstracting and indexing targets for FY86 are essentially the same as those for FY85. Abstracting efforts will focus on reducing the abstracting mean time to a maximum of 60 days. Indexing mean time will be similarly reduced to a maximum of 30 days. It should be remembered that the mean abstracting and indexing times necessarily include some shelf time; i.e., a mean abstracting time of 32 days does not indicate that the actual abstracting of each document took 32 days.

A detailed analysis of documents belonging to one of the priority groups listed above but for which no abstract has been prepared due to limited abstracting resources will be undertaken. A preliminary review put the number of such documents at approximately 500. Recommendations and a proposal for processing these documents will be set forth for review and appropriate action.

Efforts to evaluate abstract quality and utility will be renewed. Given the high level of effort expended in producing the abstracts, it is important to determine if they are indeed being fully utilized. The CDIE Document Processing Coordinator and representatives of the Research Services contractor will be consulted in order to resolve problems encountered with the abstract evaluation effort in FY85. The evaluation mechanism will be ready for implementation by mid FY86. Results will be analyzed and the A.I.D. Abstracting Guidelines modified accordingly by the end of FY86.

As part of an ongoing attempt to decentralize the task of abstracting, work will begin early in FY86 on condensing the A.I.D. Abstracting Guidelines into a shorter abstracting manual which can be clearly understood and applied by A.I.D. offices in preparing author abstracts for submission along with documents. The manual will be completed and submitted for review and comment in mid FY86.

### C.3.3. Thesaurus Maintenance

During FY85, development of the A.I.D. Thesaurus (which was produced under the predecessor AID/DIHF contract) was completed, the Thesaurus was loaded onto MINISIS, all pre-existing descriptors on the DOCRD and PROJRD data bases were converted to valid A.I.D. Thesaurus descriptors, and a permanent Thesaurus Review Committee was established. Specific accomplishments are described in more detail below, followed by an outline of plans for FY86

#### C.3.3.1 FY85 Accomplishments

##### C.3.3.1.1 Revisions to the Thesaurus and Conversion of DIS and RANDD descriptors.

The first few months of FY85 were devoted largely to resolving the remaining problems in mapping descriptors from the DIS and RANDD Thesauri to the A.I.D. Thesaurus. A large number of Thesaurus revisions were made during this period. These changes resulted from both mapping problems and from continuing internal review, performed in conjunction with DI staff. Several new terms were added; a few terms were removed; scope notes were added and/or revised; the lead-in vocabulary was expanded; and, broad, narrow, and related term relationships were modified in some cases.

When all mapping problems had been resolved, the Concordance to the A.I.D. Thesaurus, a compendium showing how the RANDD and DIS descriptors on PROJRD and DOCRD data bases would be replaced by A.I.D. Thesaurus descriptors, was printed and distributed. Fifty copies of the Concordance were produced in January 1985.

Automatic conversion of old descriptors on PROJRD and DOCRD data bases was accomplished during February and March of 1985. Manual conversion of ambiguous DIS/RANDD descriptors was initiated concurrently and continued through May. The latter involved examining thousands of document records to determine appropriate new terms.

##### C.3.3.1.2 Thesaurus Maintenance

A Thesaurus Review Committee comprised of DI and DIHF personnel was formed in Spring 1985. The Committee held its first meeting in April, and reviewed 28 suggestions for Thesaurus changes. As a result of this review 7 new terms were approved, 4 terms were deleted, and 6 other changes were made; 13 suggested changes were not approved.

The Committee agreed to disseminate its decisions primarily through memos to indexers and to personnel using the A.I.D. Thesaurus for data base searches.

During FY85 a total of 114 suggestions for Thesaurus changes were received; most of these suggestions were received between June

and September, and due to scheduling problems over the Summer were not reviewed by the Committee until October.

#### C.3.3.1.3 Thesaurus Loading

The Thesaurus became operational on MINISIS in May 1985. Revisions approved at the April Committee meeting were included in the Thesaurus as loaded on line.

#### C.3.3.1.4 Publications

In January 1985, Revision No. 1 of the Thesaurus was published in 50 copies. The introduction in this edition had been revised in line with suggestions from R&RS and DI personnel. Revision No. 1 included all descriptor changes made during Fall 1984.

Revision No. 2 of the A.I.D. Thesaurus, including changes approved by the Committee in April, was readied for publication during May and June. This edition incorporated several new features, such as updated indexing guidelines, a copy of the Thesaurus Update Suggestion Form, and tabs subdividing the alphabetical section. A total of 150 copies were produced.

Due to problems by the printing vendor and tab supplier, by a large-scale distribution of Revision #2 did not commence until 10/85.

As noted above, a Concordance to the A.I.D. Thesaurus (50 copies) was printed in 1/85.

#### C.3.3.1.5 Management terms

During FY85 DI and DIHF staff again addressed the subject of "management terms" (i.e., non-Thesaurus terms which will capture information on project management). A preliminary list of such terms was developed, however, due to changes in RSSA staff, final decisions on the terms themselves and on criteria for employing them were postponed until FY86.

#### C.3.3.1.6. A.I.D. Classification Scheme

A meeting of DI and DIHF personnel was held in February to discuss classification schemes for USAID libraries, and it was decided to recommend that the libraries use the A.I.D. Classification Scheme (based on the A.I.D. Thesaurus). Either abbreviated or full versions on the Scheme could be used, depending on library size.

The Classification Scheme has been updated to incorporate Thesaurus changes made in April 1985.

#### C.3.3.2 FY86 Plans

Goal: To continue to maintain the A.I.D. Thesaurus as a valuable tool for retrieval of development information.

#### C.3.3.2.1 Thesaurus Maintenance

Continue to hold regular meetings of the Committee, as often as necessary to provide timely review of suggested changes, and to disseminate the results of these meetings widely.

#### C.3.3.2.2 Publications

Publish 200 copies of the Thesaurus, as updated during FY86. Alternative methods of publication will be investigated, in hopes that we may avoid some of the problems that occurred with Revision No. 2 and, to a lesser degree, with previous editions. One option would be to use COM; another to create a tape for laser printing.

#### C.3.3.2.3 Management terms

Determine what management terms are needed; define and disseminate guidelines for applying management terms.

#### C.3.3.2.4 A.I.D. Classification Scheme

Keep the Classification Scheme current and re-publish as necessary.

## C.4 USER SERVICES

### C.4.1 Order Fulfillment

Fulfillment of orders from A.I.D., contractors, LDC's, PVO's and the general public have been and will continue to be one of the key operations of the DIHF. Orders are received, logged in, analyzed and filled within the time parameters specified by CDIE. Orders are filled through producing on demand copies of negative diazo fiche copies, paper copies of documents in stock or blowback paper copies from fiche masters or a combination of these.

#### C.4.1.1 FY85 Accomplishments

During FY 1985, 3366 total on-demand orders and requests were filled with a combination of 2098 fiche copies, 12,240 blowback paper copies, and 12,698 stock copies distributed. In addition 6565 copies of ARDA, 1356 copies of population materials for S&T and about 9000 copies of PPC evaluation publications were distributed using approved mailing lists. During FY 1985, a number of innovations were made to improve the quality and timeliness of order fulfillment and to reduce overall costs and improve the efficiency of User Services operations. Our primary effort is devoted to two fundamentals: fulfillment of orders in the time frame specified by A.I.D. and ensuring that each order is complete and all documents included are completely legible.

Follow-up letters are automatically generated both for non-paying orders which have been filled and for those invoices for which we have received no response. Response to these letters has been good and this method has allowed us to significantly reduce the volume of our outstanding orders.

During the year, paper copies of documents which could not be reproduced from microfiche were moved to the Order Fulfillment area for the creation of a Paper Copy Library. Data base rotations were made accordingly to reflect the new location. Additional materials are regularly identified as orders are filled which cannot be reproduced from microfiche in readable form. Paper copies of these documents are located in the basement warehouse (DIHF), the Gaithersburg warehouse or are acquired through the Acquisitions unit and these copies are put in the Paper Copy Library and the system is updated accordingly. Our goal is to provide readable copies of virtually every document listed in the system.

New three part invoices were instituted during the year. These are printed on paper with attached labels. The new invoices are time and labor saving, reduce typing errors and are more professional in appearance. The white copy is filed, the yellow copy is sent to the requestor and the blue copy is kept for attaching to the remittance.

Also during the year, more systematic quality control review was initiated. Machine operators have been given more responsibility for reviewing their completed work and ensuring that an order is complete and ready to ship. Each order is also carefully reviewed page by page and document by document to ensure that every order is complete and the quality of the documents included in it is the best possible given the originals we are using by a supervisor.

At CDIE's direction, we are only supplying copies to AID/W and USAID which are entirely readable. Documents which are in any part illegible when copied are indicated on the order form as being available only in microfiche. Less than one percent of documents ordered must be listed as unavailable or as being only available in microfiche. Titles for which we have no paper or fiche copies to duplicate or publications which cannot be reproduced in a readable copy from our master are passed to the Acquisitions Unit so that they can attempt to locate replacement originals. Titles dated before 1978 are not included in this effort as they are probably no longer available.

In the area of customer service, better attention was paid to assisting users in their inquiries by more detailed system checking (other language versions, related documents on the same project, etc.) and special rush or pick-up services were instituted whenever the work flow of priority I orders from A.I.D. allowed. When no fiche or paper copy was available at the DIHF for a particular A.I.D. order, we now routinely attempt to locate a fiche copy in one of the other complete collections of fiche housed in SA-18. Requests for more information on subjects, projects or documents are referred to CDIE Research Services, the A.I.D. Library, other offices in A.I.D. or commercial publishers routinely. Arrangements for standing orders were instituted to expedite orders from frequent customers and to reduce accounting costs at this end. This arrangement will be promoted to organizations which have placed more than five orders with the DIHF during the coming FY. Standing orders save contract accounting time and expenses and are more convenient and allow for quicker document provision to general public users.

#### C.4.1.2 FY86 Plans

During FY86, a number of improvements to operations will be instituted. The quality, appearance and durability of blowbacks will be improved by using black vinyl covered cloth book tape over the glued spines. This was instituted in October and has been well received by users. Typeset, printed covers with graphic designs and an inside text have been designed and approved and will be used on blowbacks. We are in the process of preparing an updated schedule of postage rates and shelf copy prices for approval which will more realistically cover costs for the provision of materials to the general public. During FY 1985, a global modify program was run which provided prices for documents with frame counts automatically saving a great deal of accounting time and expense. We also began and will conclude a

manual addition of prices to document records with page counts but without frame counts. Virtually all PN records will then have prices in DOCRD allowing for quick and easy invoicing. While we have undertaken mailings to nonpaying requestors for some time, we will begin marking the requestor records for those individuals who have not payed when their materials have been shipped to avoid sending them materials without prepayment.

Beginning Oct. 1, 1985, we will begin to use new categories for requestor types. These correspond closely with the categories used by the Research staff allowing for easy and realistic compilation of data on overall CDIE operations. These new categories also allow us to better identify the sector of the U.S. general public which is ordering publications and provides a breakdown on orders from A.I.D. contractors. Annual statistical reports summarizing order activity by country for LDC's and a breakdown of total paying and free orders will be generated to compliment this data which will continue to be collected and synthesized monthly.

In the area of equipment, a number of improvements will be made during FY86. A new Kodak photocopy machine is to be acquired which makes high quality copies and has a number of capabilities the Xerox machine lacked. A Pitney Bowes machine is to be acquired to enable us to perform mailing operations in-house. This will be both more cost effective and efficient and also gets the mail into the postal system more rapidly. The feasibility of providing an alternative binding system either for special uses or for production binding will be explored and the costs and benefits considered. Also, the feasibility of having a back-up photocopy capability in-house or shared with another organization will be carefully studied. To optimize the existing equipment, regular test procedures are used daily on the Xerox 970 blowback machine to ensure that it is providing the best quality copies possible. The existing 970 has been plagued by frequent breakdowns due to heavy useage and its age. While this has made it difficult in some cases to adhere to the specified turn-around times, every effort has and will continue to be made to keep to our specified schedule. An alternative blowback capability is available in the Xerox Reproduction Center in Alexandria and was used during the past year on several occassions for priority I orders. The costs of this back-up mechanism makes it viable only in emergencies.

#### C.4.2. Bulk Distribution Services

##### C.4.2.1 FY85 Accomplishments

The DIHF will continue to be responsible for receiving and mailing/distributing copies of bulk publications as directed by A.I.D. We are also responsible for making updates to the various mailing lists when specified and for editing and maintaining the lists which have been given to us by A.I.D. An additional staff person specifically designated to maintain and update the mailing lists will be hired during the coming fiscal year to ensure that

this important part of DIHF operations receives the attention it requires. The following mailing lists are maintained:

- 1) Requester -- Requestors of publications
- 2) ARDA Mailing List (approximately 7000 names and addresses)
- 3) Population Mailing List -- for journal subscriptions for S&T/Pop
- 4) Evalrd -- the mailing list for PPC/E (1,100 names and addresses)
- 5) AID/Energy -- names and addresses for USAID and AID/W energy officers
- 6) Agriculture -- 385 names and addresses for USAID, AID/W and LDC institutions with agricultural interests
- 7) Recipient -- a standardized, coded mailing list for AID/W and USAID

Bulk quantities of stock for distribution are also maintained for all series specified by A.I.D. These include:

- 1) Documents which have been listed in the quarterly issues of the National Resources Technical Bulletin
- 2) Water for the World titles
- 3) Techniques Americaines titles
- 4) NPS publications on natural resources planning for S&T/FNR

A number of activities relevant to the mailing lists occurred during FY 1985. We were responsible for data entry of several hundred cards used for the manual PPC mailing list. After duplicate checking, the cards were formatted, coded and entered. Regular additions are sent to the DIHF for entry and are input after checking for duplication. Additional input from PPC is required to make optimum use of this system.

We continued to maintain the S&T/POP list of 504 names and addresses of individuals to receive population mailings. These individuals are coded according to the journals or newsletters they are to receive. The DIHF is responsible for acquiring bulk copies of the serials from their publishers, tracking receipts and costs and distributing these titles. Individuals are added to this mailing list at the direction of A.I.D.

The ARDA mailing list (7271 names and addresses) was reviewed during the year as well. A list of current free subscribers which are neither with A.I.D. or are LDC institutions were sent to A.I.D. for review. When a CDIE staff member is on TDY, a list of current ARDA recipients in that country is sent to the mission for their review and recommended additions and deletions. Eleven host country printouts were sent into the field in FY 1985. Current paying subscribers (about 200) are contacted for renewal purposes on a quarterly basis. A special mailing was done in June which included a letter indicating that as ARDA was four issues behind, all subscribers will be credited with an extra year.

Also during FY 1985, a new data base, RECIPRD, was designed, developed and created. This data base will provided a standardized approach to AID/Washington mailings. It is based closely on the A.I.D. phone book and provides addresses at three levels: bureaus, offices and divisions. It is also coded by sectoral interests at a very basic level. The list is segmented to indicate whether the office or division has a programmatic or a technical interest. Missions were input directly as they appear in the phone book. It will be updated as new phone directories are issued.

#### C.4.2.2 FY86 Plans

During FY 1986 a number of activities relevant to the mailing lists will occur. A mailing to current recipients of PPC publications will be sent requiring their reply in order to continue receiving mailings. We also plan to evaluate the USAID portion of the list in coordination with PPC. Several missions are not included and others have no copies directed to the mission director and/or the program office.

We are in the process of collecting all mission phone directories. A partial collection was assembled by A.I.D. and a second mailing was sent to non-responses. The few which have still not responded as of December will be contacted through their desk officers. These directories will be coded and addresses input into the RECIPIENT data base for use as a standardized mission mailing list which allows for the differences between missions. It will be updated as phone directories are received. A schedule will be established for the phone directories indicating contact and date received for follow-up if the new version is not received next year.

Both the ARDA and requestor addresses in REQUESTR will be edited de-duped and merged into RECIPRD, during the coming year. A number of inconsistencies in address format and errors which have been input into the system will be corrected at that time. While new addresses are carefully proofed each month by a supervisor, no attempt is made to make them consistent with other addresses for that organization or to see if the address is a duplicate. Regular annual proofing of the entire mailing list will ensure that these inconsistencies, irregularities and errors are corrected. Old addresses for U.S. addresses will also be recoded during the year using the new codes effective October 1, 1985.

Subscription renewals will continue to be sent to ARDA subscribers several months before their subscriptions are due to expire. As responses are received from A.I.D., free recipients who are no longer entitled to free subscriptions will be contacted to see if they wish to continue ARDA on a paying basis. A mailing will be undertaken to see if current free recipients wish to continue receiving ARDA. One problem always associated with the ARDA mailing list involves the identification of who our LDC, PVO and general public users are. A questionnaire will be sent to all ARDA recipients at some point during the coming FY. They will be included either with the subscription renewal

notice, the inquiry letter to free recipients or the subscription notice sent to former free recipients who have been designated by A.I.D. as individuals and institutions who must pay. A profile statement will be prepared at the conclusion of our receipt of responses to this mailing which will be part of the quality assurance report. A promotional brochure advertising ARDA will be designed, the graphics prepared, the text written and copies will be printed after A.I.D. approval. It will be used for individuals and organizations requesting information about ARDA. The feasibility of using the brochures for a promotional mailing to generate new subscribers from certain potential user populations will be explored.

The following schedule will be followed in the area of mailing list maintenance:

- 1) Updating REQUESTR with new user categories (by Feb)
- 2) Mailing to ARDA recipients which should be paying (Feb - May)
- 3) Mailing to ARDA free recipients (after CDIE clearance for them as free recipients, May - June)
- 4) Mailing to PPC publication recipients (June - July)

#### C.4.3. Inventory Management

##### C.4.3.1 FY85 Accomplishments

Inventory control is essential for the operations of the DIHF. A number of collections are stored in Bethesda or in the Crabbs Branch warehouse facility. These items include paper copies of all documents which are filmed, copies of pre-1978 documents which are included in the Inventory data base, extra copies of A.I.D. publications and other publications for which we are responsible for bulk shipments, negative masters of PPC publications, office collections and several libraries of materials (RTAC, the Engineering Library from SA-14, etc.). These materials have been logged in and have been stored in an appropriate location for easy retrieval and safe storage.

The inventory information for documents which was previously kept in the Warehouse Inventory Management Program (WIMP) data base was added to DOCRCD records so that data on documents could be accessed in one place. The records were checked to see that they were current at the time of that merging of data bases. An inventory of PPC titles on hand was undertaken and a list of recommended titles for reprinting was submitted to PPC. A project to label bad fiche in the diazo collection was begun during the year. It will be completed during the coming fiscal year.

##### C.4.3.2 FY86 Plans

During the coming fiscal year, a number of improved methods of inventory control will be instituted. An inventory of the basement stock will be undertaken in combination with an

inventory of the shelf stocks on the main floor of the DIHF. A third inventory of the warehouse stock copies will also be undertaken. When these three inventories are completed, we will be in a position to access our needs for additional copies of certain titles which we would recommend for purchase (non-A.I.D. publications) or reprinting (A.I.D. publications) to PPC or S&T. The stock on hand numbers in Docrd would be updated at that time as well.

The diazo microfiche collection at the DIHF will also be inventoried during the coming year. Silvers or masters will be pulled when available and diazo copies will be filed. When all three DIHF copies are missing for a particular fiche, we will attempt to locate a copy in another collection either in SA-18 or New State. As these diazos cannot be copied as fiche, paper blowbacks will be made for use at the DIHF and filed in the Paper Copy Library and the records for these documents will be updated to reflect this in Docrd. To avoid problems with the diazo collection, we will begin using fiche out cards and inserting them as fiche are removed. These cards will also speed the refilling process.

Other inventories will be undertaken of the DIHF collections in the basement and of the Paper Copy Library to ensure (1) that all materials included are designated with that location in Docrd and (2) that all materials which are supposed to be in those collections are filed there in the appropriate place.

Our schedule of inventories for the coming year will include the following:

- 1) Inventory of Paper Copy Library (Nov.)
- 2) Inventory of DIHF collections (Dec.)
- 3) Inventory of basement stock and first floor shelf stock (Jan.)
- 4) Inventory of warehouse stock copies for bulk mailings (Jan.)
- 5) Inventory of diazo fiche copies (at conclusion of bad fiche labelling project, May or June 86)

These inventories will be conducted annually.

## C.5 MICROGRAPHICS PROCESSING

### C.5.1 Core Micrographics

#### C.5.1.1 FY85 Goals

Microfilming of the AID institutional memory includes providing all staff, equipment, facilities and services to perform the task of generating microfiche for all AID supported documents and reports. Specific tasks include:

- \* Preparing documents for conversion to microfiche
- \* Microfilming approximately 5000 documents resulting from AID funded projects
- \* Performing quality inspection to ensure that all fiche comply with established specifications
- \* Reproducing and distributing diazo copies of microfiche in response to standing orders and to AID specified recipients.
- \* Reproducing an estimated 3,500 single diazo copies of microfiche annually to fulfill on-demand requests for microfiche.

Other goals proposed for the year included:

- \* Purchase heavy duty paper cutter to speed document processing
- \* Modify duplicating equipment to automatically copy from silver masters.
- \* Develop minimum source document quality guidelines to ensure a better quality microfiche
- \* Develop Xerox 970 test procedures to ensure quality reproductions and evaluate preventative maintenance

#### C.5.1.2 Achievements

Microfilming: During FY85 4,444 documents were filmed, which created 6,598 masters and 380,705 frames. A total of 164,307 diazos were duplicated during the year. These totals reflect the use of geobureau filmed documents in lieu of core filming. As indicated in Exhibit 5A, a significant increase in production was experienced during the latter half of the fiscal year. This is partially due to an increased workload, but more efficient handling in document preparation was made possible by the use of heavy duty paper cutting equipment installed in March.

A total of 299 geobureau documents were added to DOCR during FY85. This includes documents filmed prior to FY85.

Distribution: A total of 10 sets of PN document titles on microfiche were distributed monthly as follows:

AID Library  
CDIE/DI  
AID Missions (Cairo, Costa Rica, Honduras, Jakarta, Zaire)  
World Bank  
IDRC

At AID's request, microfiche shipments to Honduras were suspended at the end of the fiscal year. Our understanding is that their fiche collection will be returned for possible redistribution to another mission.

A total of 5 sets of PD project documents on microfiche were distributed monthly as follows:

AID Library  
CDIE/DI - 2 copies  
CDIE State Department Annex.

An additional copy of PN and PD fiche are provided to DIHF User Services for use in creating enlargements in response to user requests. Duplicates of PN and PD microfiche have also been made to respond to special collection requests in conjunction with TDYs to AID Missions. Microfiche sets provided for outreach support are discussed in Section C.6.

The APDMS Connection: Throughout the year, efforts have been made to integrate the processing and filming of Core and APDMS operations. CDIE was briefed on the APDMS operations. APDMS documents which are selected for DOCR from the geobureau files are distributed as other PD documents. A total of 299 geobureau documents were added to DOCR during FY85. The APDMS operations are discussed in detail in Section C.5.b.

Other FY85 Accomplishments: Microfiche support was also provided to AID's Pesticide Project administered through the USDA. (137 documents, 142 fiche) and USAID Philippines (388 documents, 609 fiche).

AID/PEST requested a cost estimate for converting a special environmental document package. An estimate was prepared and forwarded, however, approval not received to date.

Procedures for periodic testing of the Xerox 970 were developed and personnel trained in their use. The test involves making an enlargement from a "standard" fiche containing representations of various quality levels. The enlargement is compared to one made immediately following equipment maintenance or repair.

A procedure was developed and complemented for creating a second generation silver duplicate roll of ARDA microfiche. The result is faster turnaround of ARDA microfiche duplicates and elimination of the need to maintain ARDA microfiche shelf copies.

### C.5.1.3 Problems, Solutions

**Quality:** The quality of the original document continues to impact on the quality of the microfiche product. Documents are enhanced as much as possible to ensure a quality reproduction. However, because original quality defects are amplified by the filming process, improvements in this area are dependent on improvements in the quality of source documents provided.

Errors in currently produced fiche headers are identified through contract quality control checks. Errors in headers produced before FY85 are identified through several sources at DIHF and CDIE/DI staff. All errors are corrected and replaced as soon as they are identified.

In general, most problems occur in the title field and project number fields. The title field problems are the result of cataloging procedures to capture the title as it appears on the document which in some cases results in an incomplete microfiche header title, (ex. Annual Report) or a truncated title (due to inadequate title field length) in the microfiche header.

**Production:** Required production totals exceed the number of processed documents submitted for filming. Despite increased efforts in Acquisitions and Cataloging, chronic backlog conditions in Micrographics are non-existent. As a result, there is an appearance that contract goals are not being met. When the workload is insufficient, document preparation personnel are assigned elsewhere.

### C.5.1.4 Goals for FY86

The principal micrographics functions are document preparation and diazo duplication. Both are production oriented tasks. Accordingly, the goals for these tasks are based on the previously determined production levels for these functions. A total of 5000 documents are to be prepared for filming during the year. This total does not reflect collaboration between DIHF CORE and Geobureau operations. Since microfilming production levels are geared to processing volumes, microfilming production can only be as great as the number of documents acquired.

It is anticipated that the diazo duplication levels will increase significantly over the next year. This increase is projected as a result of greater awareness of the value of the document collections to the AID Missions and LDC institutions.

Other priorities for FY86 include:

1. Continue to improve quality control procedures for filming and storing microfiche.
2. Continue to integrate processing and filming procedures of DIHF CORE and geobureau operations

3. Continue to refine operations to accomplish tasks within time and financial limitations: monitor throughput volumes for indications that additional resources are needed.
4. Respond to request for microfiche distribution within the appropriate time frame.

#### c.5.2 Agency Records Management Microfiche

##### C.5.2.1 FY85 Objectives

Plans for FY85 included concurrent conversion and updating of project document microfiche in six Bureau offices. Support of these activities were to include document preparation, microfilming, inspection, duplication, distribution and user training.

Conversions to be completed included Contracts Office (on-going from FY84), Africa Regional and Near East. Conversion of LAC was postponed to FY86 at AID's request. Update targets included Africa (7 times), Asia (7), Contracts (7) and Near East (1).

##### C.5.2.2 Achievements in FY85

Discounting update sessions cancelled by client offices, all but one of the conversion/update objectives were met. That update was for Near East which was completed in October, 1985. Asia and Contracts both cancelled update sessions due to their preference for a quarterly cycle. An Africa update and the LAC conversion were postponed because the client offices were not prepared as of their scheduled starting dates.

Exhibit C.5.2.2 compares production for FY85 with previous years and FY86 projections. Exhibit C.5.2.1. is a monthly break-out of microfilming and distribution levels.

Other significant activities included the development of a microfiche information package for Missions, briefing of 30 project officers and 6 support personnel on the use of the fiche system and/or MINISIS and installation of over 30 pieces of microfiche and computer equipment. The current equipment inventory is shown in Exhibit C.5.2.3.

##### C.5.2.3 Problems, Solutions

One principal concern was that labor resources would be sufficient for the anticipated workload. The uncertainty of the volume estimates of the files targeted for conversion was confirmed when about 25% of the Near East project documents was completed. Revising the projections yielded more realistic figures, but the linear foot volumes proposed in the contract Statement of Work were simply not delivered by the bureaus. For example, the Africa Regional office delivered 56 linear feet of files compared to the SOW volume of 195 feet.

BUREAU MICROFILM SUMMARY REPORT  
FOR FY85

<u>Work Completed</u>	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT
<b>AFRICA BUREAU updates</b>												
Documents		519	754			685	525	202	478	195	837	98
Fiche		568	816			707	570	228	521	198	865	103
Frames		11546	17134			8173	11906	4751	9279	2494	13815	1224
Boxes		6	9			7	7	3	6	2	9	1
<b>ASIA BUREAU updates</b>												
Documents			1027	2	588	225			488	688		
Fiche			1051	2	601	232			496	732		
Frames			18667	72	5226	2216			4694	7909		
Boxes			11		6	3			5	8		
<b>CONTRACTS</b>												
	(conversion)			(updates)								
Documents	911	981	276	784	570	1308	262				490	610
Fiche	1021	1688	388	790	600	1311	262				490	611
Frames	44634	48463	11488	11647	18242	13833	2205				5753	8966
Boxes	19	22	6	8	8	14	3				5	7
<b>NEAR EAST conversion</b>												
Documents			72	1868	1817	1097	977	1130	578	216	363	868
Fiche			109	1301	1538	1262	1215	1414	633	283	469	1039
Frames			6093	49560	59048	41383	46884	56105	15872	12718	20941	32463
Boxes			3	27	31	28	28	31	11	6	11	16
<b>AFRICA REGIONAL conversion scheduled to begin in June, 1985</b>												
Documents									363	804	846	575
Fiche									410	968	1043	712
Frames									12423	33671	39170	27734
Boxes									7	17	19	13
<b>LAT. AMER/CAR conversion postponed till later in calendar 1985</b>												
Documents												
Fiche												
Frames												
Boxes												
<b>PROJECTED TOTALS (all)</b>												
Documents	1700	300	4270	4610	4260	4810	6010	4450	5300	4660	6620	7500
Fiche	1720	300	4270	4670	4260	4810	6010	4450	5300	4660	6620	7500
Frames	68000	12000	108600	135400	133600	146600	179200	139400	169800	141500	184388	267380
Boxes	48	7	53	56	44	50	61	47	56	42	69	89
<b>ACTUAL TOTALS (all)</b>												
Documents	911	1588	2129	1846	2375	3315	1764	1332	1907	1903	2536	2251
Fiche	1021	2248	2276	2893	2739	3512	2047	1642	2060	2073	2865	2466
Frames	44634	60009	45382	61279	82516	65655	60995	60856	42268	56792	79768	60396
Boxes	19	28	29	35	45	52	38	34	29	33	44	37
<b>INVOICE AMOUNT</b>												
	37949	37278	46458	55997	68275	63928	61894	48893	48254	51609	52519	59909

Exhibit (2.1 (Cor.))  
 AFRICA BUREAU FY85  
 MONTHLY ACTIVITY/STATUS REPORT  
 AS OF 09/30/85

<u>Work Completed</u> (Update)	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT
<b>PROJECTED TOTALS</b>				cancel								
Documents			1500	750		750	750	750		750		750
Fiche			1500	750		750	750	750		750		750
Frames			30000	15000		15000	15000	15000		15000		15000
Boxes			16	8		8	8	8		8		8
<b>ACTUAL</b>												
Documents		519	754			685	525	202	478	195	837	98
Fiche		560	816			707	570	228	521	198	865	103
Frames		11546	17134			8173	11906	4751	4279	2494	13815	1244
Boxes		6	9			7	7	3	6	2	9	1
<b>QC</b>												
Documents Inspected		NA	54			42	42	18	36	12	54	6
Documents Rejected		NA	4			0	3	1	0	0	2	0
<b>DIAZO COPIES</b>												
Documents		1811	2597			2864	1846	670	1604	679	2817	369
Fiche		1931	2800			3113	2009	754	1733	691	2919	389
<b>Documents Distributed</b>												
Central Files		519	754			685	525	202	478	195	837	98
Project Officers		519	754			685	525	202	478	195	837	98
Tech Files: ARD		248	349			430	289	89	236	97	412	46
ENG		86	110			189	74	18	77	27	128	13
EHR		154	212			275	146	57	117	41	187	30
SDP		114	122			229	116	36	80	48	142	33
POP		44	73			125	44	11	40	22	93	19
HN		127	177			246	127	55	94	54	181	32
Other, Special				33		1660						
<b>Cumulative Distribution</b>												
Central Files				19187		19782	20387	20589	20987	21182	22109	22207
Project Officers				19187		19782	20387	20589	20987	21182	22109	22207
Tech Files: ARD				10032		10462	10751	10840	11076	11173	11585	11631
ENG				3777		3966	4040	4058	4135	4162	4290	4303
EHR				5836		5311	5457	5514	5631	5672	5859	5889
SDP				4078		4387	4423	4459	4539	4587	4729	4762
POP				1783		1908	1952	1963	2003	2025	2118	2138
HN				4853		5099	5226	5281	5375	5429	5610	5642
<b>Work in Process</b>												
<b>Document Preparation:</b>												
Boxes at AID		2	0		1	0	0	2	0	2	0	2
Boxes at DIHF		3	0		0	0	0	2	0	6	0	3
<b>At Service Bureau:</b>												
Documents		0	0		0	153	129	0	0	0	0	98
Fiche		0	0		0	176	1500	0	0	0	0	104
Frames		0	0		0	4604	3445	0	0	0	0	1656

BEST AVAILABLE COPY

Exhibit C.5.2.1 (Cont'd)  
 AFRICA REGIONAL BUREAU, FY85  
 MONTHLY ACTIVITY/STATUS REPORT  
 AS OF 09/30/85

<u>Work Completed</u> (Conversion)	JUNE	JULY	AUG	SEPT
<b>PROJECTED TOTALS:</b>				
Documents	2760	3450	2760	3450
Fiche	2760	3450	2760	3450
Frames	93900	117300	93900	117300
Boxes	28	35	28	35
Documents	363	804	846	575
Fiche	410	960	1043	712
Frames	12423	33672	39170	27734
Boxes	7	17	19	13
<b>QC</b>				
Documents Inspected	42	102	108	84
Documents Rejected	0	2	5	1
<b>DIAZO COPIES</b>				
Documents	1089	2412	2538	1725
Fiche	1230	2880	3129	2136
<b>Documents Distributed</b>				
Central Files	363	804	846	575
Project Officers	363	804	846	575
Africa PD	363	804	846	575
<b><u>Work in Process</u></b>				
<b>Document Preparation:</b>				
Boxes at AID	1	2	1	0
Boxes at DIHF	1	5	2	1
<b>At Service Bureau:</b>				
Documents	122	44	48	27
Fiche	125	70	56	42
Frames	3224	4464	2158	2220

Exhibit 5.2 1 (Cont'd)  
 ASIA BUREAU, FY85  
 MONTHLY ACTIVITY/STATUS REPORT  
 AS OF 09/30/85

<u>Work Completed</u> (Update)	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT
<b>PROJECTED TOTALS:</b>												
Documents			1050		460	460	cancel	cancel	460	460		460
Fiche			1050		460	460	460		460	460		460
Frames			20100		9200	9200	9200		9200	9200		9200
Hoxes			11		5	5	5		5	5		5
<b>ACTUAL</b>												
Documents			1027	2	588	225			488	688		
Fiche			1052	2	601	232			496	732		
Frames			10667	72	5226	2216			4694	7909		
Hoxes			11		6	3			5	8		
<b>QC</b>												
Documents Inspected			66		36	18			30	48		
Documents Rejected			2		0	0			0	0		
<b>DIAZO COPIES</b>												
Documents			3087	2	1753	628			1441	2034		
Fiche			3171	6	1788	648			1464	2162		
<b>Documents Distributed</b>												
Central Files			1027	2	588	225			488	688		
Project Officers			1027	2	588	225			488	688		
Tech Files: ARD			675	2	349	150			280	474		
EHR			189		123	20			79	133		
PHN			169		105	8			106	55		
<b>Other, Special</b>												
<b>Cumulative Distribution</b>												
Central Files				9210	9798	10023			10511	11199		
Project Officers				9210	9798	10023			10511	11199		
Tech Files: ARD				6244	6593	6743			7023	7497		
EHR				1553	1676	1696			1775	1908		
PHN				1653	1758	1766			1872	1927		
<b>Work in Process</b>												
<b>Document Preparation:</b>												
Hoxes at AID			0	1	0	0			1	0		
Hoxes at DIHF			0	2	0	0			1	0		
<b>At Service Bureau:</b>												
Documents			0	0	225	0			0	0		
Fiche			0	0	233	0			0	0		
Frames			0	0	2239	0			0	0		

Exhibit C.5.2.1 (Cont'd)

Contracts Office FY85  
MONTHLY ACTIVITY/STATUS REPORT  
AS OF 09/30/85

<u>Work Completed</u> (Conversion)	OCT	NOV	DEC	JAN (updates)	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT
<b>PROJECTED TOTALS:</b>												
Documents	1700	300		1200	200		200	200	200		200	200
Fiche	1720	300		1260	200		200	200	200		200	200
Frames	68000	12000		30000	2000		2000	2000	2000		2000	2000
Boxes	40	7		21	2		2	2	2		2	2
<b>ACTUAL</b>												
Documents	911	981	276	784	570	1308	262				490	610
Fiche	1021	1120	300	790	600	1311	262				491	611
Frames	44634	48463	11484	11647	18242	13833	2205				5753	8966
Boxes	19	22	6	8	8	14	3				5	7
<b>QC</b>												
Docs Inspected	NA	NA	9	48	48	84	18				38	42
Docs Rejected	NA	NA	0	0	0	0	0				0	0
<b>DIA70 COPIES</b>												
Documents	1822	1962	552	1568	1148	2616	524				980	1220
Fiche	2042	2240	600	1580	1200	2622	524				982	1222
<b>Docs Distributed</b>												
Central Files	911	981	276	784	570	1308	262				490	610
Auditor's files	911	981	300	784	570	1311	262				490	610
Project files												
<b>Cumulative Dist.</b>												
Central Files	8695	9676	9952	10736	11306	12614	12786				13276	19286
Auditor's Files	8695	9676	9952	10736	11306	12614	12786				13276	19286
Project Files	6817	6817	6817	6817	6817	6817	6817				6817	6817
<b>Work in Process</b>												
	(conversion)			(updates)								
<b>Doc. Prep.</b>												
Boxes at AID	NA	NA	2	1	1	1	0				1	1
Boxes at DIHF			1	2	1	1	0				3	2
<b>At Service Bureau:</b>												
Documents	0	0	0	0	49	0	0				195	0
Fiche	0	0	0	0	49	0	0				196	0
Frames	0	0	0	0	2246	0	0				1457	0



Exhibit C.5.2.2  
FY85 PRODUCTION COMPARISONS

BUREAU	UNITS	EXPERIENCE			PROJECTION		CONVERSION DATE
		FY83	FY84	FY85	FY85	FY86	
AFR/PD	DOCUMENTS	11966	6110	4293	6000	4200	FY83-84
	FICHE	13986	6554	456	6000	4200	
	FRAMES	443278	123020	80322	120000	84000	
	BOXES (ft.)			50	64	42	
ARA	DOCUMENTS			* 2588	** 5000	2400	FY85-86
	FICHE			3125	6300	2400	
	FRAMES			112998	342000	48000	
	BOXES (ft.)			56	185	24	
ASIA	DOCUMENTS	5676	2843	3018	3800	2900	FY83-84
	FICHE	5231	2960	3114	3800	2900	
	FRAMES	154242	44044	30784	79000	58000	
	BOXES (ft.)			33	41	29	
CONTRACTS	DOCUMENTS		7784	6192	4400	4200	FY84-85
	FICHE		8149	7065	4600	4200	
	FRAMES		198184	165321	122000	84000	
	BOXES (ft.)			92	80	42	
LAC	DOCUMENTS				** 2400	8700	FY86 now, was FY85- FY86
	FICHE				3000	11700	
	FRAMES				111000	348000	
	BOXES (ft.)				60	195	
NEAR EAST	DOCUMENTS			7578	** 12600	2000	FY85 No FY85 updates
	FICHE			9263	15600	2000	
	FRAMES			341027	592000	40000	
	BOXES (ft.)			192	320	20	
TOTAL	DOCUMENTS	17642	16737	23669	34200	24400	
	FICHE	20217	17663	27135	40300	27400	
	FRAMES	597520	365248	730762	1,406300	689400	
	BOXES (ft.)			423	750	352	

\* Excludes documents converted in FY86

\*\* Conversion data is adjusted based on SOW volumes and Near East experience

INVENTORY OF GEOBUREAU MICROFICHE EQUIPMENT  
 INSTALLED BY LTS AS PART OF APDMS PROJECT  
 Report Date: October 21, 1985

<u>Equipment Description/Model</u>	<u>Serial Number</u>	<u>Delivered to:</u>	<u>Location:</u>	<u>Date</u>
<b>BURFAU: Africa</b>				
1. Minolta Reader Printer RP405E	• 1615467	AFR PD Central	Rm. 2485NS	01/83
2. Microdesign 935 Reader	• 3020697	Leroy Jackson	Rm. 2884NS	01/83
3. Microdesign 935 Reader	• 3020698	Morgan Gilbert	Rm. 2884NS	01/83
4. Microdesign 935 Reader	• 3020699	AFR PD Central	Rm. 2485NS	01/83
5. Microdesign 935 Reader	• 3020692	Al Harding	Rm. 2884NS	01/83
6. Microdesign 935 Reader	• 3020690	Karen Murick	Rm. 2884NS	02/28/83
7. Microdesign 935 Reader	• 3031646	Tom Williams	Rm. 2439NS	03/83
8. Microdesign 935 Reader	• 3020696	Sid Chambers	Rm. 2723NS	03/83
9. Microdesign 935 Reader	• 3020691	Paul Urobel	Rm. 2723NS	03/83
10. Microdesign 935 Reader	• 3191130	Carlos Pasquale	Rm. 2450B-NS	08/16/83
11. Microdesign 935 Reader	• 3191126	Thomas Lofgren	Rm. 2446NS	08/16/83
12. Microdesign 935 Reader	• 3191120	Glen Slocum	Rm. 2733A-NS	06/83
13. Microdesign 935 Reader	• 3390968	Alan Reed	Rm. 2450B-NS	
14. Microdesign 935 Reader	• 3191125	David Dawson	Rm. 2733A-NS	08/17/83
15. Metal Fiche files ( 28 each, 2-drawer units)	• no numbers	Lawrence Williams	Rm. 2485NS	as of 09/85
16. Microdesign 955 Reader	• 180233	Lawrence Williams	Rm. 2485NS	01/83
17. Microdesign 955 Reader	• 3020701	Russell Anderson	Rm. 2723NS	03/83
18. Microdesign 935 Reader	• 3390969	A. McDonald	Rm. 2733A-NS	09/30/83
19. Microdesign 935 Reader	• 3390967	J. Snead	Rm. 2495-NS	09/30/83
20. Plastic fiche trays (Luxer 34 each)	• no number	Proj/TR Off's w/reader		as of 09/85
21. Hewlett-Packard 2622A Terminal	• 2143W05051 tags 62, 60		Rm. 2485-NS	01/15/83
22. Racal-Vadic Data Modem VA212LC	• 250590 tag 63	L. Williams	Rm. 2485-NS	01/15/83
23. Canon (KaiFisher) Model 488 fiche duplicator	• 486	L. Williams	Rm. 2485-NS	11/09/83
24. Microdesign 935 reader	• 4071706 tag 129	POP TR Division	Rm. 2643 NS	06/84
25. Microdesign 935 reader	• 4071708	SDP TR Division	Rm. 2486 NS	06/84
26. Microdesign 935 reader	• 4071710 tag 128	ENG TR Division	Rm. 2495 NS	06/84
27. Microdesign 935 reader	• 4071711 tag 136	EHR TR Division	Rm. 2638 NS	06/84
28. Eight-drawer index cardfile cabinet (2 each)	• tags 104, 219	AFR/PD	Rm. 2485 NS	4/8/84
29. " " " " (2 each)	• tag 220, none	ARD TR, AFR/PD	Rm. 2941 NS	4/85
30. Microdesign model 935 reader	• 4071709 tag 130		Rm. 2637 NS	as of 9/85
<b>BUREAU: A/NE Asia</b>				
1. Minolta Reader Printer RP405E	• 1617885 tag 222	Asia/PD Central	Rm. 3318NS	05/83
2. Metal Fiche files (10 each, 2-drawer units)	• no numbers	Sue Bugg/ARD TR.	Rm. 3318NS	as of 9/85
3. Microdesign 935 Reader	• 3020693	Asia/PD Central	Rm. 3318NS	05/83

continued...

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Exhibit C.5.2.3 (Cont'd)

A/NE ASIA Bureau, continued

6. Microdesign 935 Reader	?	3191124	Patricia Matheson	Rm. 3318NS	04/83
7. Microdesign 935 Reader	•	3390970	David Tiedt	Rm. 3318NS	04/83
8. Microdesign 935 Reader	•	3191119	Gary Imhoff	Rm. 3328NS	05/83
9. Microdesign 935 Reader	•	3191114	Computer room	Rm. 3318NS	05/83
10. Plastic Fiche Trays (Luxor, 10 each)	•	no number	Proj/TR Off's w/reader	as of	09/85
12. NMI Model 513 fiche viewer	•	LX010D049 tag 149	PHN TR Division	Rm. 3327 NS	06/84
13. Eight Drawer fiche file	•	tag 223	ARD TR	Rm. 3327 NS	04/85
14. " " " "(2 each)	•	tag 221, none	Sue Bugg	Rm. 3318 NS	09/85
15. Microdesign model 935 fiche viewer	•	3191116	Feinburg	Rm. 3318 NS	09/84

BUREAU: A/NE Near East

1. HP 2622A terminal,		2126W05568 tags 48,57	L. Thompson	Rm. 4440	12/84
2. Plastic fiche trays, Luxor brand, 12 each		none	Project officers	Rm. 4440	12/84
3. Racal Vadic data modem model VA212C		466191 tag 170	Leola Thompson	Rm. 4440	12/84
4. Microdesign brand fiche reader		4071707	Leola Thompson	Rm. 4440	12/84
5. NMI Model 513 fiche reader		LX010D040 tag 140	Leola Thompson	Rm. 4440	12/84
6. Microdesign Model 935 fiche viewer		3191115	Leola Thompson	Rm. 4440	12/84
7. NMI model 513 fiche viewer		LX010D047 tag 147	Judith Willu	Rm. 6642	12/84
8. Microdesign Model 935 fiche viewer		3450706	Leola Thompson	Rm. 4440	12/84
9. Microdesign model 935 fiche viewer		3191122 tag 101	Leola Thompson	Rm. 4440	1/85
10. Microdesign model 935 fiche viewer		4070179 tag 126	Leola Thompson	Rm. 4440	1/85
11. Microdesign model 935 fiche viewer		3450706 tag 110	Leola Thompson	Rm. 4440	1/85
12. Microdesign model 935 fiche viewer		3191110 tag 105	Leola Thompson	Rm. 4440	1/85
13. Microdesign model 935 fiche viewer	•	3191117	Gary Bittner	Rm. 3327	1/85
14. Microdesign model 935 fiche viewer		3190966 tag 103	Shirley Frierson	Rm. 6660	1/85
15. Microdesign model 935 fiche viewer	•	3191120	Gary Lewis	Rm. 3327	1/85
16. Microdesign model 935 fiche viewer		3191129	Leola Thompson	Rm. 4440	1/85
18. Minolta reader printer model RP405E		1621434 tag 217	Shirley Frierson	Rm. 6660	03/85
19. Microdesign model 935 fiche viewer		3191127 tag 102	Shirley Frierson	Rm. 6660	01/85
20. Microdesign model 935 fiche viewer		3020695	Leola Thompson	Rm. 4440	03/85
21. Microdesign model 935 fiche viewer		3390971	Leola Thompson	Rm. 4440	03/85
22. Metal fiche files, 2 drawer, 9 each		no tags	Leola Thompson	Rm. 4440	03/85
23. Microdesign model 935 reader		3191121	Leola Thompson	Rm. 4440	02/85
24. Eight drawer fiche file cabinet	•	tag 210	NE/PDS	Rm. 4440	04/85
25. Microdesign model 935 fiche viewer		5061266 tag 109	"	"	04/85
26. NMI Model 513 fiche viewer	•	LX010D050 tag 147	NE/PO Division	Rm. 6930 NS	09/85

continued...

**A/NE Near East, continued**

26.	Microdesign model 935 fiche viewer	•	5061264 tag 205	NE/TECH	Rm. 3311	05/85
27.	"	"	5061272 tag 206	"	Rm. 6660	"
28.	"	"	5061261 tag 209	"	Rm. 3327	"
29.	"	"	5061256 tag 210	"	Rm. 6660	"
30.	"	"	5061260 tag 190	"	"	"
31.	Microdesign model 935 fiche viewer		5061273 tag 211	"	"	"
32.	"	"	5061260 tag 212	"	"	"
33.	"	"	5061262 tag 199	"	Rm. 3327	"
34.	"	"	5061257 tag 200	"	"	"
35.	"	"	5061274 tag 213	"	Rm. 6660	"
36.	"	"	5061269	NPN	???	"

**BUREAU: Africa regional Affairs**

1.	Minolta RP405E reader printer		1621554 tag 225		Rm 4531	06/85
2.	Eight drawer fiche file cabinet (one each)		none		Rm 4527	09/85
3.	Microdesign model 935 fiche viewer		5061275	Ross	Rm 4531	06/85
4.	"		"	Mahan	"	06/85
5.	Plastic fiche trays (Luxor brand, 6 each)		no number	Project Officers w/viewers		09/85
6.	Metal fiche files (4 each, 2-drawer)		"		Rm 4531	06/85
7.	Microdesign model 935 fiche viewer		5061271 tag 226	Gordon	Rm. 4531	07/85
8.	"		5061259 not tagged	Davis	Rm. 4527	09/85
9.	Microdesign 955 Reader	•	3191123 " "	McSwain	Rm. 4527 NS	09/85
10.	Microdesign 955 Reader	•	3020700 " "	Gray	Rm. 4527 NS	09/85
11.	Microdesign 935 Reader	•	5061267 " "		Rm. 4527 NS	09/85

**BUREAU: Contracts**

1.	Hewlett-Packard 2622A Terminal		2245W30061 tags 96,97	P. Stewart	Rm. 708,SA14	10/04/83
2.	Racal-Vadic VA212LC Modem		S/N 466189 tag 171	Pat Stewart	Rm. 708,SA14	10/17/83
3.	Microdesign 935 Reader		3450705 tag 117	Pat Stewart	Rm. 708,SA14	12/12/83
4.	Metal Fiche files (7 each, 2-drawer units)		no number	Pat Stewart	Rm. 708,SA14	as of 6/84
5.	Plastic Fiche Trays (Luxor, 11 each)		no number	Pat Stewart	Rm. 708,SA14	as of 8/84
6.	Minolta Model RP405E Reader/printer		1619581 tag 146	Pat Stewart	Rm. 708,SA14	03/84
7.	Eight-drawer index cardfile cabinet		no number	Pat Stewart	Rm. 708,SA14	04/84

**OTHER:**

1.	In stock at DIHFI 4 each, MICRODESIGN model 935 fiche viewers					
2.	Microdesign model 935 fiche viewer		5061263 tag 188	Dan Dikcius	Rm. 274,SA11	03/85
3.	Minolta reader printer model RP405E		1621534	Stored for LAC in State's vault		10/85

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Reliability of volume estimates remains an issue at the on-set of FY86, and will reduce available lead time to hire and train staff for the LAC conversion. We will continue to monitor productivity and change staff numbers appropriately with confirmation of actual document volumes. The production schedule shown in Exhibit C.5.3.4. reflects adjustments to the SOW figure based on experience and contains new projections for the next four years.

The positive aspects of this situation, however, is that funds are not being expanded at a rate as originally projected.

Problems with document formatting hampered conversion efforts during the latter half of the Fiscal Year. Of particular note were experiences with NE/TECH/EDUC and Africa Regional. Near East and ARA both had special formatting needs that were resolved by (SER/MO) rechecking formatted documents and (DIHF) providing extra information in microfiche headers. Each of these conversions were delayed by two weeks or more due to format-related problems.

In response to requests from several users, additional information is being included in microfiche headers. The appearance of this document-specific information will assist in proper retrieval of microfiche.

The A/NE merger had a significant impact on day-to-day operations, particularly where project document microfilming occurred simultaneously with changes in project officers' portfolios. The Asia and Near East support staff did an outstanding job of informing us of office location changes. The re-organization of A/NE also changed microfiche distribution procedures: another central copy of Asia microfiche needs to be set up and the Asia TR distribution system currently in place will be replaced with distribution of fiche to individual TR officers.

#### C.5.2.4 Goals for FY86

Production: Exhibit C.5.3.5. shows the anticipated monthly production volumes and schedule for FY86. The LAC conversion volume is based on the ratio of actual estimated linear footage (boxes) volume and the average document count per box experienced in Near East.

Africa, Asia, and Contracts update volumes are based on FY85 experience. The Near East and Africa Regional update volumes are based on the Africa bureau ratio of (first-year) update: Conversion volumes. The Africa Regional update volume estimate has been inflated however, due to an expectation that the PIO document count will greatly exceed that of its conversion.

As Exhibit C.5.3.5. proposes, there will be concurrent activities in three bureau offices. A weekly schedule will be developed in cooperation with SER/MO and client offices. The first order of FY86 is to complete conversion of about 1800 documents that were

scheduled to be filmed in FY85. Due to the postponement of the S & T and LAC conversions, FY86 production is expected to be about the same as that for FY85.

Exhibit C.5.B.3.6. volumes allow for diazo distribution changes resulting from the A/NE merger, but not for any possible changes resulting from the Africa Bureau RA/TR consolidation or mission requests for fiche collections. We will adopt a "wait and see" attitude regarding the latter two items.

The program to provide missions with project microfiche files will begin with the mailing of descriptive literature and a user's guide to them in January, 1986. The fiche files will be offered in sets per country, on a cost recovery basis. Missions will have to provide viewing equipment, and will be charged a single price for all fiche and updates through FY89.

During FY86, the feasibility of establishing an automated system to handle both AID/W and mission distribution will be examined. Such a system would exist for each bureau or bureau database and may include information on projects assigned to individuals at AID/Washington.

In view of the effect of Agency staff reductions on bureau support personnel, it has become feasible to consolidate the functions of document preparation performed by direct hire and Micrographics personnel. Should AID approve this approach, we will expand it's current document preparation function to include document "reformation". Such a move offers operational advantages such as continuity of handling procedures, eliminate parallel controls, improved schedule coordination and provides the potential for introducing microfilm priorities based on document type.

Exhibit C.5.3.4  
 MICROFICHE VOLUME ESTIMATES  
 For FY86 - FY89

OFFICE	ACTIVITY	Lin. Ft. (Boxes)	DURATION	TOTAL DOCUMENTS	TOTAL FICHE	TOTAL FRAMES
AFRICA PD	UPDATE	168	4 years	16,800	16,800	336,000
ASIA PD	UPDATE	117	4 years	11,600	11,600	232,000
CONTRACTS	UPDATE	168	4 years	16,800	16,800	336,000
NEAR EAST	UPDATE	80	4 years	8,000	8,000	160,000
AFRICA REGIONAL	UPDATE	96	4 years	10,000	10,000	192,000
LATIN AMER/CAR.	CONVERT	195	7 months	8,700	11,700	348,000
	UPDATE	90	3 years 2 months	9,000	9,000	180,000
S&T	CONVERT	600	18 months	30,000	35,000	1,400,00
	UPDATE	300	18 months	30,000	30,000	600,00
FOOD/PEACE/HOUSING	CONVERT	220	9 months	8,800	10,500	350,000
	UPDATE	140	2 years	14,000	14,000	280,000
SUBTOTAL	CONVERT	1,015		47,500	57,200	2,338,000
SUBTOTAL	UPDATE	1,159		136,200	136,200	2,316,000
GRAND TOTAL		2,174		187,300	193,400	4,654,000

Exhibit C.5.3.5  
DOCUMENTS TO BE FILMED IN FY86\*

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	TOTAL
DATES													
FP/PD		700		700		700		700		700		700	4200
FR/RA			600			600			600			600	2400
SA		800			700			700			700		3800
ONT	700		700		700		700		700		700		4200
.	500			500			500			500			2000
LAC												1000	1000
VERSION													
LAC				1100	1100	1100	1100	1100	1100	1100	1100		7700
TOTAL	1200	1500	1300	2300	2500	2400	2300	2500	2400	2300	1400	2300	24400

Does not include approximately 1800 residual FY85 documents

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Exhibit C.5.3.6

Cumulative and Projected  
Document Distribution

<u>BUREAU</u>	<u>DISTRIBUTION</u>	<u>FY83</u>	<u>FY84</u>	<u>FY85</u>	<u>FY86</u>
AFRICA/PD	AFPD	11966	18706	22999	27200
	IPS	11966	18706	22999	27200
	ARD		9395	11631	13700
	ENG		3580	4303	5300
	EHR		4670	5889	7100
	HN		4549	5642	6000
	POP		1665	2138	3000
	SDP		3841	4762	5900
	OTHER		-	1693	-
	TR Central	11966	-	-	-
AFRICA/RA	CENTRAL			2588	2400
	PROJECT OFFICERS			2588	2400
	AFRICA/PD			2588	2400
A/NE ASIA	ASPD	5676	8519	11537	14400
	PCS	5676	8519	11537	14400
	ARD*		5566	7496	
	EHR*		1364	1908	
	PHN*		1484	1927	
	EFE*		700	-	1300
	TR OFFICERS	-	-	-	2900
	TR Central	5676	-	-	14900
CONTRACTS	CENTRAL		7784	13976	18200
	AUDITORS		7784	13976	18200
	PROJECT OFFICERS		6817	6817	6817
LAC	CENTRAL				8700
	PROJECT OFFICERS				8700
	TR OFFICERS				8700
A/NE NEAR EAST	PD CENTRAL			7578	9600
	PROJECT OFFICERS			3004	3800
	TECH CENTRAL			7578	9600
	TR OFFICERS			4574	5800
	DP/EVAL			7578	9600
	OTHER			304	100
TOTAL DOCUMENTS DISTRIBUTED		52,926	111,689	189610	267417

\* To be discontinued after first FY86 update

## C.6 OUTREACH AND PUBLICATIONS

Outreach activities provided through the DIHF contract must be integrated with other AID efforts to market CDIE products and services. The DIHF plays a major support role in collaborating with CDIE staff involved in providing information services to AID Missions, LDC institutions, and the public.

The task of outreach overlaps in content and strategy with training and technology transfer which are covered in separate sections of this report. A review of both sections provides a more comprehensive picture of outreach efforts which have been and will be performed through the DIHF contract.

During FY85, the DIHF has provided outreach support in the following areas:

1. Promotion of CDIE through regular periodic and single issue publications preparation and dissemination.
2. Providing support for CDIE staff who are involved in TDY's or other outreach to missions and AID/W.
3. To develop and produce a variety of publications designed to increase the utilization of the DIS and to make DIS holdings available to a wider audience.

Exhibit C.6.I presents a tabular summary of outreach activities for FY85.

### C.6.1 Acquisitions Lists

Regular publications are required to update ARDA (discussed in Section C.8) indicating new publications which have been acquired for the DIS and listing newly abstracted A.I.D. projects. These Acquisitions Lists provide an opportunity for CDIE outreach and for providing current awareness to established CDIE users. Designed primarily for the missions, the Lists are also valuable to CDIE staff to keep them informed of current publications.

During FY 1985, Lists of new technical documents (PN's) were prepared on a monthly basis for distribution to CDIE and certain missions with which we have established contacts. In alternate months, lists of new projects were prepared and distributed.

During FY86, the Lists will be distributed on an expanded basis. From the 190 total copies of two different Lists distributed during September 1984, we expect to increase our distribution on the following schedule:

- 1) Remaining USAID (Oct - June) as contact people are established

- 2) PPC individuals outside DI (Dec - May)
- 3) Mailings to obtain lists of interested AID/W people (Jan - July)
- 4) Mailings to government, libraries, LDC's and PVO's and development organizations to determine potential subscribers (Mar - Sept)

We anticipate the following distribution (per issue):

Oct	--	200
Nov	--	300
Dec	--	400
Jan	--	500
Feb	--	500
Mar	--	500
Apr	--	600
May	--	600
Jun	--	700
Jul	--	700
Aug	--	700
Sep	--	800

As the information in these publications has a high currency value, the publications are prepared simply and quickly to get the information into the field and to AID/W people as quickly as possible. Only current materials dated from the two most recent years or projects beginning in the two most recent fiscal years are included. To ensure immediate availability of all documents included, we use the month's materials returned from filming for our lists of new technical documents. The lists are carefully edited to delete subprojects and ephemeral documents. CDIE outreach and acquisitions reminders are included on the inside covers. A number of enhancements have been made to these publications during the year and others are being considered.

We have responsibility for screening each month's titles for inclusion, preparing the covers and table of contents, proofing the copy, duplicating, collating and distributing the Acquisitions Lists.

#### C.6.2 Special Bibliographies

Special bibliographies offer CDIE the opportunities to provide convenient information to its user community on subjects of high interest and the opportunities to increase the visibility of our products and services to priority user groups.

Bibliographies are designed to be attractive and useful guides to literature on subjects of high interest indicated by A.I.D. We plan to tie the subjects of these bibliographies closely with the Program Manager's Reference Guides (PMRG's) being prepared by PPC.

Current quality citations will be selected from the database and outside sources. The citations in each bibliography will be carefully screened by subject experts in the Agency and the selection will be coordinated with the individuals responsible for each PMRG. Each citation will be fully abstracted. Availability information for

non-A.I.D. materials if any are included will be provided. We will be responsible for the initial selection of materials, coordinating review by appropriate subject authorities, abstracting, cataloging/abstracting new titles acquired for the bibliographies, designing the format, layout and covers, and for providing for printing and distribution.

During FY 1985, the first of three volumes of the Farming Systems Bibliography was prepared in cooperation with S&T/Ag. (See below Section C.6.10 for more details).

During FY 1986, six bibliographies will be prepared on approved topics. Anticipated length is approximately 100 abstracted citations. The subjects chosen in conjunction with proposed Program Manager's Reference Guide (PMRG) topics, would be:

- Irrigation
- Potable Water
- Rural Roads
- Private Enterprise

Other PMRG topics underway include credit in development, rapid methods in statistical analysis and a health manager's reference guide. The following schedule is proposed:

- Irrigation (completion Dec, dist Jan)
- Potable Water (begin Dec, completion Mar, dist Apr)
- Private Enterprise (begin Jan, complete Apr, dist May)
- Rural Roads (begin Feb, complete May, dist June)
- TBA (begin Mar, complete June, dist July)
- TBA (begin Apr, complete July, dist Aug)

The following schedule of activities will be followed:

- Preparation of initial list of citations
- Review by individual working on appropriate PMRG or other authority (direct hire or contractor)
- Location of recommended materials not in the system for cataloging
- Abstracting of citations for which abstracts have not been prepared
- Submission of tentative list of titles to one or more A.I.D. authorities for their review
- Design of cover, writing and coordinating contributions for front matter, and organization of layout
- Circulation in CDIE for comments/approval
- Printing and distribution

We will also provide systems support to make each bibliography available in machine readable form.

### C.6.3 Mission Newsletter

USAID has been targeted by CDIE for priority outreach services. As CDIE's priority user group, regular, informal contact with the mission community is essential. For this reason, a simple, memo-type

newsletter will be prepared on a regular basis for mission users of CDIE services. The first issue will be targeted to those in the missions with which we have established contacts. Subsequent issues will be distributed to all missions.

Content is expected to include notes on new non-A.I.D. publications, news on CDIE field activities and mission TDY's to CDIE in Washington, short articles on services and products available from CDIE and other items as appropriate.

We anticipate distributing 100 of each issues being prepared each year. We will be responsible for writing material, soliciting and coordinating other contributions from CDIE and the field, design and layout of each issue, editing and proofing of the copy, for duplication and for distribution.

#### C.6.4 Program Manager's Reference Guides (See also Section C.6.2)

The PMRG's are being prepared by a number of individual contractors for PPC on a number of subjects of high interest to USAID. We will coordinate with the author/editors of the individual guides to put each one into machine readable form. This will enable missions who wish to access certain portions of the PMRG's online. The PMRG's will also be available in machine readable form as part of MicroDIS.

#### C.6.5 Serials Lists

The collection of serials available in the A.I.D. Library are an important resource for AID/Washington and missions as well as the general public. This list also provides acquisition and ordering information for mission DIC's who wish to improve their holdings of development serials.

During FY 1985, Library staff provided up-to-date and complete information enabling us to prepare a draft list of Library serials. 30 copies of the preliminary version were prepared for use in the Library, Research Services and were taken on several TDY's to mission librarians.

During FY 1986, we will prepare two versions of the Serials List. One version will be very complete providing title history information and complete publisher and ordering information for each title. This version is intended for USAID DIC's primarily. A second shorter version will contain only title and frequency information. This version is intended for the general public especially for walk-in patrons in the Library and for inquiries from other libraries about the A.I.D. Library collection.

These versions will be available in Nov. 1985. Distribution to USAID DIC's is planned for December. Two enhancements to this list will be made during the year. Holdings information will be added for titles for which we keep back issues. A subject sort will also be prepared and included in a revised version as an index. The revised edition is planned for the summer of 1986 with distribution to the missions at that time. We plan to prepare new editions, completely revised and updated on an annual basis.

We are responsible for all data entry to update the list, editing and proofreading to ensure the accuracy of the entries, cover design, preparation of the text, duplication and distribution of these lists. We expect to prepare 100 copies of each edition in the long version and another 100 copies of each in the shorter version.

#### C.6.6 Other Planned Outreach Materials

We will coordinate with CDIE to develop other serial and/or one time issue publications which would be familiarize USAID with CDIE services and keep them up-to-date with new products and services.

Questionnaires for profiling mission DIC's were prepared during FY 1985 and distributed on a selective basis in order to identify our mission DIC users. Several have been returned. It is hoped that if enough questionnaires are completed, a directory of USAID DIC's could be prepared during the coming FY for the information of CDIE and the mission DIC's. Completed questionnaires will provide information which will be helpful to us in planning and preparing publications and services for USAID.

Based on completed questionnaires which we have received and other dialogue with USAID staff, we are considering a number of publications. Products under consideration include a manual for DIC operations and a processing manual for mission libraries. Also under consideration are a list of core serials titles in development, technology, health and population with price and publisher information based on the A.I.D. Library, interlibrary loan requests which have been received and standard sources to assist DIC's collection development. Similarly, a core list of reference titles appropriate for a DIC collection containing publisher and cost information is being planned for the coming fiscal year. We will also begin preparing and distributing regularly updated lists of shelf copies we have available for free distribution.

#### C.6.7 Standing Order Microfiche and Indexes

Many missions have found complete collections of microfiche for new titles helpful in their operations. During FY 1985, standing order PN fiche were sent on a monthly basis to five missions. Computer output microfiche (COM) cumulative indexes were also prepared to provide access to the complete PN fiche collections. These indexes sort on author, title, institution, descriptors and docid numbers.

During FY 1986, quarterly paper copy update indexes continue to be prepared, duplicated, bound and distributed to fiche recipients. An annual COM set of indexes will be prepared and distributed which will supercede these paper updates and the previous COM indexes.

We also plan to offer other standing order arrangements for new fiche based on individual profiles. Possible parameters for profiles include single countries, regional groups of countries, complete geobureau collections and various sector mixtures. A complete collection of fiche will be prepared based on these individual profile requirements and indexes will be run so these collections can be accessed. Regular updates and indexes will be automatically be forwarded. Profiles can be changed on demand. We will monitor each

individual profile carefully to ensure that we are providing exactly the right fiche needed for the individual DIC's.

#### C.6.8 Minisis Users Group (MUG) Meeting

The DIHF provided all planning and logistics services to host the 7th Annual Minisis Users Group meeting held October 28 through November 1, 1985. Services include:

- arranging for the 4H Conference Center to accommodate 150 attendees
- providing simultaneous translation equipment for English and Spanish
- coordinating with IDRC on the technical program and logistics
- preparing, printing and distributing a directory of Minisis installations
- developing and using Minisis data bases to support directory publications, mailing list, attending housing lists, invoice and conference management
- arranging tours to World Bank/IMF, NAL, NLM, LC and DIHF.

#### C.6.9 A.I.D. Research and Development Abstracts

ARDA Volume 12:1 was published in January of 1985. As a result of an A.I.D. decision in May 1985 to make ARDA truly a current awareness publication by limiting items cited to those published in the previous year, over 200 documents abstracted for ARDA were removed from consideration for publication in the next issue. While there was general agreement on the need for this action, it nonetheless adversely impacted the FY85 ARDA production schedule.

By the end of FY85, approximately 240 technical documents had been abstracted, 150 of which were to be selected for ARDA 12:2 which was scheduled for publication at the beginning of FY86.

#### C.6.10 Farming Systems Research Bibliography

In cooperation with the Bureau for Science and Technology's Office of Agriculture, Volume I of a Farming Systems Bibliography was published in French, Spanish, and English in early FY85. The English version was mailed to approximately 3800 recipients, the Spanish to 800, and the French to 400. Catalogung, filming, and abstracting of all 100 items for Volume II of the Bibliography was completed by the end of FY85; Volume II will be printed and distributed at the beginning of FY86. A production schedule for remaining volumes of the Bibliography was adopted in the last quarter of FY85.

The DIHF was responsible for acquiring materials, cataloguing, indexing, abstracting, printing and mailing the issues to a specified mailing list. We also provided cover-to-cover translations of the text of the English language bibliography into French and Spanish and the printing and distribution of those issues.

C.6.11 FY86 Publication Goals and Objectives

Beginning in calendar year 1986, ARDA will again be published on a quarterly schedule; publication will be linked to the season to ensure adherence to a quarterly schedule. Thus, ARDA Winter 1986 will be published in January, ARDA Spring 1986 will be published in April, ARDA Summer 1986 will be published in July, and ARDA Fall 1986 will be published in October. It is important that ARDA recipients be reassured of its regular appearance after years of intermittent publication. Adherence to this regular production schedule can only increase reliance on ARDA as a source of current information.

While there is general agreement on the value of ARDA as a dissemination tool, different individuals have varying perceptions as to how to make ARDA as effective as possible. A meeting needs to be held in early FY86 to air some of these views and to review the results of ARDA evaluation efforts so that improvements can be incorporated into the Winter 1986 issue.

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## C.7 TRAINING AND USER EDUCATION

The basic goals of the training and user education function are to promote awareness of CDIE's development information resources, specifically of the Development Information System (DIS), to ensure full utilization of that system's capabilities by supporting current users as well as identifying and training new users, and to serve as a liaison between users and system developers in order to maintain the best possible system service.

### C.7.1 FY 1985 Accomplishments

#### C.7.1.1 A Training Plan for Use of AID's Development Information System

As part of the development of a formalized training program for current and potential users of AID's Development Information System, a thorough study of training requirements was completed during the first four months of the contract period by the DIHF Training Consultant. In the course of the study, key current and potential user groups were identified both within and outside the Agency, the desirable level of system proficiency was analyzed for each group, sample training modules were developed, and training resources required to support the training program were identified. Major findings emerging from this study were as follows:

- o each user group has distinctive training requirements; training sessions/briefings therefore must be geared specifically to the needs of each user group
- o an important component of the training program is the marketing of DIS capabilities as a CDIE information resource and outreach to current non-users
- o potential users need to be fully informed about what they can (and cannot) expect the system to provide them, and where to go to obtain information that is not available through the DIS.

#### C.7.1.2 DIS Online

The value of a mechanism for regular communication with DIS users has long been recognized. During the previous contract period, a newsletter, Plug into DIS, was developed and disseminated to system users. The pilot issue of a successor publication, DIS Online, was prepared and distributed during FY 1985. The focus of this issue was on providing detailed information and instructions for the use of the International Development Research Centre (IDRC) databases that were loaded onto the DIS system and made available to DIS users during mid-1985.

#### C.7.1.3 User Training and Briefings

Throughout FY 1985, several sessions were conducted by DIHF personnel to upgrade the skills of current DIS users and respond to questions regarding new system features made available during the year. A prototype briefing package describing both general CDIE services and specific DIS capabilities was developed by AID direct hire personnel in collaboration with the DIS Training Consultant.

#### C.7.1.4 Development of User Aids

Based upon recommendations outlined in the DIS training requirements study (see 7.1.1 above), preliminary work was completed on the development of several user aids to facilitate use of key DIS databases. A comparative chart of "quick access fields" and print formats for the DOCUMENT and PROJECTS databases was completed.

#### C.7.2 FY 1986 Goals and Objectives

The primary goal for FY 1986 is to develop and implement a formalized training and user education program designed to support full utilization of CDIE information resources and services. This program will draw upon both the experience of previous DIS training efforts and the recommendations of the DIS training requirements study completed in FY 1985. However, it will also take into consideration the subsequent development of a menu interface to the DIS designed to facilitate access for infrequent users (MenuDIS), the development of a microcomputer-based system designed to meet needs of Mission Libraries/Development Information Centers (MicroDIS), and current CDIE emphases on outreach initiatives and Mission support. The specific objectives of the training function for FY 1986 are therefore as follows.

##### C.7.2.1 Develop an Action Plan for Implementation of a Formalized Training and User Education Program

In order to ensure successful, phased implementation of a training and user education program, a detailed Action Plan needs to be developed. It is anticipated that this Plan will basically focus upon those objectives outlined below, but will provide more specific details on the sequencing of activities and the associated products and outcomes of each.

It is anticipated that this Action Plan will be completed in January 1986.

##### C.7.2.2 Promote Awareness of CDIE Information Resources and Identify Potential Users of the Development Information System (DIS)

One of the key points made in the training requirements study completed in FY 1985 concerns the need for 'outreach' as distinct from training. In addressing current non-users of CDIE information systems and/or services, a marketing and education approach is an important first step in identifying those

individuals who simply need to know about available information resources (including the DIS) and those who feel that they can benefit from personal access to CDIE databases. All such training outreach efforts will focus on DIS capabilities in the context of overall CDIE support for meeting information requirements. The primary mechanisms for achieving this objective will include briefings, preparation of written and audio-visual materials to support presentation of such briefings by any CDIE personnel, arrangement for inclusion of information about DIS resources in AID's training program for new staff, and identification of opportunities to publicize information about the DIS through brochures, newsletters, and other appropriate AID publications.

It is anticipated that at least one briefing will be given per month beginning in February 1986 (or coinciding with the release of MenuDIS). Work on at least one package of standardized briefing support materials will be initiated by January 1986 and completed by April 1986. Opportunities to publicize CDIE information systems will be sought on an ongoing basis.

#### C.7.2.3 Provide Training in Use of the DIS

Training sessions will be targeted to specific user groups. It is further anticipated that specific user groups will be trained on the DIS system most appropriate to their level of use and needs, e.g., CDIE/DIHF staff and CDIE/Research and Reference Staff will be supported in their use of the full set of DIS capabilities, infrequent users in the AID/W Geo Bureaus and S&T offices will be trained in use of MenuDIS, and interested Mission DIC's will be supported in their use of MicroDIS. Where appropriate (e.g., for all CDIE direct hire and contractor staff), training sessions will include an on-site overview of DIHF operations.

One session on the full DIS system will be presented to CDIE/Research and Reference staff during November, December and January to train personnel hired under the new AED contract, and thereafter as necessary to support new staff. It is anticipated that MenuDIS will be introduced in the Geo Bureaus in January-February 1986; two training sessions will be conducted during these months, one in each bureau that is anticipated to use the system at this time (Africa Bureau and Near East/Asia Bureau). At least one follow-up training session will be provided to each of the bureaus using MenuDIS. At least one training session will be provided per month to additional individuals identified as interested in using either the full DIS or MenuDIS systems between April and September 1986. Training of MicroDIS users will not begin until the system is released (March 1986) and will be scheduled as needed to support system developers.

#### C.7.2.4 Develop DIS Training Materials and User Aids

A major effort is needed during this contract period to both upgrade system documentation provided to current DIS users and to

develop new manuals and user aids for the MenuDIS and MicroDIS systems. While a preliminary version of a MenuDIS Users Guide was prepared for presentation at the Minisis Users Group Meeting (October 27-November 1, 1985), this manual needs to be refined to facilitate step-by-step use of the MenuDIS system. The MicroDIS manual will be prepared by the system developers, but will be refined with the assistance of the Training Coordinator. User aids which need to be developed and compiled into a DIS mini-manual include: a glossary of MINISIS/DIS terminology, logon instructions, Boolean logic diagrams, DIS data base history chart, summary sheets on the major DIS databases, uniform code lists and command summary terminal cards.

It is anticipated that the DIS mini-manuals will be developed during December 1985 and January 1986, MenuDIS manuals will be developed during January 1986, and MicroDIS manuals will be completed during February 1986. All manuals will be reviewed on a monthly basis and updated as necessary; updated information will be included in all new manuals and sent to users of all previously issued manuals for insertion.

#### C.7.2.5 Prepare a Handbook of Guidelines for the Operation of Development Information Centers (DIC's) in USAID Missions

Given the frequent rotation of staff in Mission Libraries/DIC's and the interest expressed by some Mission staff in a set of guidelines for setting up and operating a Mission-based Library/DIC, one objective of the training and user education program is to prepare a handbook of such guidelines. It is anticipated that the development of this handbook will parallel the development of the MicroDIS system. However, the handbook will need to be generic enough to be useful to any Mission regardless of the type of automated system selected. Preparation of the handbook will build upon work completed or in progress by CDIE staff in several missions.

An outline of the contents of a prototype handbook will be submitted in January 1986, with development of core sections to continue through February 1986. Following review by selected Missions during March-May, the core sections of the Handbook will be revised and made available to all Missions by June 1986. Development of supplemental sections will continue from July-September 1986.

#### C.7.2.6 Evaluate Training Programs and Materials

An important component of any training program is the evaluation of the extent to which training sessions and materials meet the needs of users. A questionnaire will be developed, based on similar questionnaires used in the past, and provided to all system trainees for feedback on the training process. Follow-up contact with trained users will also be made two months and six months after training to check if the system is still being used and if not, why not.

Training evaluation will follow each training session as outlined in section 7.2.4 above, with follow-up to take place as specified above.

#### C.7.2.7 Provide Ongoing Liaison with CDIE and DIS User Communities

Personal contact, follow-up and system updates are all mechanisms for ensuring that CDIE and DIS capabilities remain visible to all current and potential users. It is planned that a small data base of trained system users will be developed and added to as new users are trained, providing a means of maintaining contact information on users and documenting system use. All users will receive copies of DIS Online, which will contain information about new system capabilities and solutions to common user problems. Informal brown bag lunch sessions will be held with CDIE direct hire and contract staff to discuss system use and new features.

The user data base will be developed during December 1986 and maintained as required thereafter. DIS Online will be issued bi-monthly, beginning in January 1986; CDIE brown bag lunches will be held bi-monthly during alternate months, beginning in February 1986.

#### C.7.3 Issues to Be Resolved

One of the key components of the training and user education program as outlined above is marketing of DIS as a CDIE information resource and outreach to potential users in order to identify training needs. Careful coordination of this effort will be required within the framework of overall CDIE marketing and outreach programs.

## C.8 QUALITY ASSURANCE

The first component of this effort, Quality Assurance, calls for the monitoring of all aspects of the Facility's operations in order to anticipate potential problems and to assess DIHF performance as measured against its contractual obligations. The second component, Service Evaluation, stipulates that the services provided by the DIHF be evaluated to ensure that they are of consistently high quality and are tailored to the needs of the service requester.

As indicated in the contract Statement of Work, the institution of a series of quality control procedures and reports were to be initiated. This section addresses efforts to establish the procedures and to provide information on DIHF activities.

### C.8.1 Review of FY 1985 Activities

#### C.8.1.1 Quality Assurance

During the first year of the contract the quality assurance component underwent two operational phases -- start-up and implementation. The start-up phase was scheduled to take three months (October-December 1984). The implementation phase was planned to begin in January 1985, with the submission of the first monthly QA report.

Under the start-up phase, the first task was to review the Management Statistical Report used during the first contract period and to make any changes that were necessary for reporting activities under the new contract. This was a time-consuming task because no documentation existed which outlined the Report; no single individual could define all of the items or was aware of how the numbers were calculated; and the Report did not display its statistics in a logically-consistent format. Once the reporting categories were defined and revised, a reporting scheme was established for collecting the statistics on a monthly basis. This process incorporated both manual and system counting techniques. Manual counts were assigned to nine DIHF supervisors, who reported on activities which fell within their respective areas of responsibility. System counts (stream jobs) were the responsibility of the Quality Assurance Coordinator and the Data Base Maintenance Technician. Once these efforts were finalized, a document was written (and is kept updated) which defines each of the 160 statistics and outlines how each number is computed.

The next task was to determine which items to monitor in the Quality Assurance Report. Twenty-five outputs listed in AID's Statement of Work were chosen and their annual production requirements were used as the basis for monitoring their monthly progress. Nine additional categories were later included. These items did not have year-end goals, so their progress was measured against their own performance record.

The third task involved transferring the revised Management Statistical Report from HPWORD into the spreadsheet program called SYMPHONY. The Management Report had been created and maintained on HPWORD and HPWORD was not a powerful spreadsheet tool. To add flexibility and calculating speed to the Report, it was formatted and programmed into SYMPHONY. In addition, the Quality Assurance Statistical Report was also set-up in SYMPHONY. By using SYMPHONY, statistics could be presented in three different modes: statistically in data tables; graphically; and in textual form.

The final task under the start-up phase was the creation of the PROBLRD database in MINISIS. PROBLRD was set up to record all problems that CDIE/DI, the Research staff, and DIHF personnel experienced which were related to DIHF operations. It was designed to define each problem; identify the DIHF department where the problem originated; list the individuals responsible for solving the problem; and outline the solutions that were used.

By the fourth month of the contract the mechanisms were in place to begin reviewing the activities of the Facility. As specified by the contract, a monthly Quality Assurance Report was first issued in January 1985 and reports have been issued monthly since that time. The following summary discusses the performance of the primary DIHF departments during FY 1985.

#### C.8.1.2 Summary of Quality Assurance Report Findings:

AID Document Processing -- Project document (PD) cataloging fell short of its year-end requirement by 307 documents. Nevertheless, all materials sent to the DIHF, which fell into the PD category, were cataloged. Therefore, inadequate supply prohibited the attempt to achieve the 2,500 goal. Since January a monthly processing average of 212 documents has been maintained. This level exceeds the original monthly target by 4 documents. Earlier this year an organized acquisitions effort was implemented. As that effort becomes established, PD supplies should pick up, easing the supply shortage. Changing PD criteria to include older materials or lower-priority document types would also augment supply.

Technical document (PN) production exceeded its annual requirement by 98 documents. Since January 1985 monthly production has averaged 215 cataloged records. Its original monthly target stipulated 208 documents. The difference in outcomes between PN processing and PD processing appears to be one of supply. No production trade-offs are visible between the two during the year.

Inventory cataloging (INV) finished short of its Statement of Work requirement by 1,489 records. With production levels varying from 85 to 552 over the 12-month period, this category had demonstrated the capacity to produce and sustain large increases -- enough to possibly meet its production goal. And unlike the supply problems experienced in the PD area, INV

processing has had a supply of over 15,000 documents available all year. Its inability to satisfy its goal would appear to be a resource allocation problem i.e., not enough staff were available to accomplish all three cataloging production goals at once. As PD and PN production gained greater emphasis, INV output suffered. An analysis of the production curves of DOCUMENT (PD and PN) and INVENTORY (INV) processing since April indicates that a production emphasis in one category resulted in a trade-off or decline in the other. Before April, the cataloging staff had the services of an additional part-time cataloger who was primarily responsible for entering INV records. During that time INV output averaged 321 documents. After April, this individual assumed duties outside of cataloging, leaving the cataloging department solely responsible for entry into both databases. As a result, INV cataloging dropped to 152 records a month. The point should also be made that the supply of INV-type documents is finite. As cataloging continues, that supply will be reduced and the duplicate ratio will increase. In order to satisfy AID goals, increasing more effort will need to be expended.

During the year a total of 2,920 duplicates were screened out at the DIHF. Between February and May, 43% of the materials received were duplicates. That number dropped to a monthly average of 20% between June and September as a result of the acquisitions screening effort.

In conclusion, one of the three categories cited -- PN cataloging -- succeeded in satisfying its year-end requirement and that category did not finish with a large cushion (an equivalent of 15 days output). The increased acquisitions effort should improve this situation in 1986 by increasing document supply and reducing the time spent screening out duplicates. To further improve this situation, production requirements could be changed to closer reflect the production reached this year. Particular attention should be given to INV requirements, which averaged 291 documents a month. Its requirement was 375. If production stipulations are not altered, then the DIHF may have to hire an additional cataloger, or review their current processing procedures to determine if time and resources can be more efficiently utilized.

Non-AID Document Processing -- This category met its year-end cataloging goal of 500 documents. Since January, non-AID cataloging was able to overcome its low output period between October and December 1985. Production during that time was constricted due to the lack of available materials. Once the distribution channel was established between CDIE/DI and the DIHF in January 1985, the supply of documents has been sufficient for production. Also during the year, 131 call numbers were added.

Micrographics (Core Operations) -- The Filming Department processed all of the documents it received, yet it did meet its production goal. Over the 12-month period 3,919 documents were filmed. The difference between this total and the DOCUMENT database cataloging total of 4,791 was the result of two factors. First, documents of poor quality by-pass filming and are sent directly to the Paper Copy Library. Second, some materials which

are cataloged are acquired from the Geobureau filming effort (295). The annual requirement set for filming is based on the number of required documents that are cataloged into the DOCUMENT database each month, i.e., 2,500 PN's and 2,500 PD's equals 5,000 (the number which filming is measured against). This measurement creates several problems:

First, there is no definition of what constitutes a standard-sized document. Within the cataloging context, the effort inherent in processing a five-page document versus a 100-page document is approximately equal. The film prepping effort constitutes a ratio of 1:20.

Second, not all of the documents that are cataloged into the DOCUMENT database are sent to filming. This point was cited above. As a result, the supply of documents available to filming is too small from the start.

The number of pages prepped more accurately measures the filming work effort. As cited in various reports, some of the lowest productivity months for filming documents were the best months for prepping activity. After 12 months the ratio of documents to pages prepped has been 82:1.

Abstracting/Indexing -- The entry of original DIHF abstracts fell short of its annual goal by 65 abstracts or 4%. Its monthly output since January has averaged 136 abstracts, which is 11 above its original monthly target. Nevertheless, these gains were not enough to compensate for the low output experienced during the first quarter. Since the supply of documents bound for abstracting has been plentiful, the difficulty in overcoming that deficit must be attributed to the fact that the time and resources inherent in processing abstracts remains generally fixed. The lesson here is that abstracting must avoid production slumps, otherwise it will not be able to satisfy its annual requirements during FY 1986.

The output of indexed-only documents surpassed its first year goal by 820 documents. The editing of author-supplied abstracts doubled its anticipated annual requirement. The increased efforts in this category demonstrate a shift away from DIHF abstracts and an increased emphasis on author-supplied abstracts. The number of abstracts for both new and old design documents fell short of AID requirements by 73 and 32 abstracts respectively. The new acquisitions effort may improve this situation. Finally, the number of proposed changes to the Theasurus was under target by 186 changes.

User Services -- The number of documents requested by the Priority I Group (AID Missions, AID Washington, and AID Contractors) and the Priority II Group (LDC Requesters and Development Organizations) surpassed their respective 12-month goal by the tenth month. Priority I has demonstrated solid gains since April 1985. Priority II has generally been on or above its target all year. The number of documents requested by the Priority III Group (U.S. Requesters and Developed Country

Institutions) was 1,391 documents under its annual goal. The order of document demand resulted as follows: Priority I, 62%; Priority III, 20%; Priority II, 18%.

The demand for shelf and paper copies was almost identical, while the demand for fiche remained a distant third. Paper copy demand surpassed its year-end requirement by 4,760 documents (39%). Fiche demand fell below its year-end goal by 1,276 documents (36%). The demand for the various copy types resulted as follows: shelf copies, 46%; paper copies, 46%; fiche, 8%.

### C.8.1.3 Service Evaluation:

During the first year of the contract the service evaluation program had two objectives: to develop a 4-year plan which would schedule the evaluation of all DIHF products and services; and to implement the first stage of the plan, with a Service Evaluation Report to be issued six months later. The first effort (start-up phase) was expected to last six months (October-March 1985). The second effort (implementation phase) was scheduled to begin in April.

The first task under the start-up phase was to determine what products and services to evaluate. Discussions with DIHF supervisors resulted in a list of 35 items. Similar categories were then grouped together and a comprehensive evaluating schedule was developed. Next, a target audience was selected which included 375 requesters, all of whom had requested materials from the DIHF since October 1984. This group was weighted in favor of AID Missions and AID Washington requesters. The final task was to determine what feedback techniques best suited the various user groups. At this point, three factors inhibited further progress:

First, the institutional barriers between CDIE, DI, and the DIHF regarding the outreach issue. The division of authority between CDIE and DI has resulted in a lack of consensus on outreach objectives and a lack of coordination on outreach efforts. This situation complicates any efforts to contact DI's primary user group -- AID Missions.

Second, users can not comment on the utility of DIHF products and services unless they are familiar with them. Many AID Mission and AID Washington personnel do not know the purpose behind CDIE/DI, nor are they aware of the products and services that it offers. As a result, these users are not familiar with DIHF products and services.

Third, U.S. Government regulations make the development and distribution of questionnaires targeted to AID Missions and AID Washington very difficult. Documentation, review and approval requires months of effort.

As a result, many aspects of the original plan, particularly those efforts relying on taking samples for case studies, had to be changed. Those activities which employed other feedback

techniques, e.g., onsite testing and packaged questionnaires, were implemented. They covered the following items: on-demand document and microfiche services, microcomputer library operations (Microdis), special publications, acquisition lists, and the Thesaurus. Each of these areas is explained below:

On-demand document and microfiche services -- Since October 1984 all outgoing orders have included questionnaires which focus on the quality of the service for that order. Three reports have been issued which summarize the responses over selected periods in FY 1985. Over that time 350 requesters have responded. In addition, daily contract with CDIE/DI and Research staff has provided a feedback channel regarding AID/Mission and AID/Washington orders. An annual assessment of those results will be issued next month.

Standing order microfiche services -- Questionnaires were sent out to all five AID Missions receiving monthly fiche deliveries. The questions focused on determining the type of information center in use and what supporting equipment existed at the centers. Responses were returned from every mission except Costa Rica.

MicroDIS -- The microcomputer library system (Version 1.0) is currently being developed. To date it has been tested by outside users in the AID Cairo Mission, AID Haiti Mission, at UNESCO in Paris, and at the MUG85 meeting. In addition, several groups of mission personnel visiting AID Washington have used the system. The two-week effort in Cairo brought about the most changes.

Special Publications -- During the FY 1985 period, ARDA 12:1 and the Farming Systems Research Bibliography were distributed before proper questionnaires could be designed and approved. Since then, a questionnaire has been developed and it was sent along with copies of ARDA 12:1 in TDY packages. To date these TDY packages have been delivered to AID Missions in Cairo, Barbados, Haiti, India, Kenya, Ivory Coast, and Pakistan. So far one response has been received from Cairo. When ARDA 12:2 is ready for mass distribution, each copy will have a questionnaire enclosed.

Acquisitions Lists -- A questionnaire has been developed for the Technical Documents Acquisitions List and the New Projects Acquisitions List. These have been distributed in the TDY packages mentioned above. No responses have yet been received.

The Thesaurus -- Each Thesaurus which has been distributed has a questionnaire enclosed. To date, AID Washington and AID Cairo have received copies and sent back replies which have requested 114 changes.

Processing -- A records correction form was developed in January 1985 as a reporting mechanism to be used by CDIE/DI and Research staff to document any errors they might find in DOCUMENT, PROJECTS and their related databases. These forms are sent to the Quality Assurance Coordinator for action.

## C.8.2 Plan for FY 1986 Activities:

### C.8.2.1 Quality Assurance

Quality Assurance Reports will continue to be issued each month and an annual review of FY 1986 will be delivered in November 1986. The monthly reports will be presented in the current format using SYMPHONY and additional categories will be included as the need arises. A new tool to assist in this process will be a project management software program called HARVARD TOTAL PROJECT MANAGER. HTPM will be set up to define, prioritize, and show relationships between various tasks and subtasks. In this capacity, monthly progress of all DIHF activities can be followed more closely from a single vantage point and potential problems can be identified. Exhibits C.8.1 and C.8.2 graphically depict proposed quality assurance plans for FY 1986.

### C.8.2.2 Service Evaluation

Service Evaluation Reports will be issued every six months beginning in April, 1986. These reports will review all evaluation activities listed below. A User Services Evaluation, which reviews on-demand document and microfiche service for FY 1985, will be issued separately in December 1985. Subsequent reviews of user services will be included in the Six-month Evaluation Reports.

On-demand document and microfiche service -- A new user services questionnaire is being distributed in all outgoing orders. In addition, daily contact with the CDIE/DI and Research staff will be maintained to record their feedback regarding AID/Washington an AID/Mission orders.

MicroDIS -- Further mission testing is scheduled with a return trip to the AID Cairo Mission. Also the Quality Assurance Coordinator is scheduled to work through the system independently and provide his assessment.

Acquisition Lists -- Questionnaires will to be distributed in future TDY packages which include the Technical Documents and New Projects Acquisitions Lists. In addition, the questionnaires will be enclosed at regular intervals during the monthly distributions. Meetings with CDIE and the Research staff will be held to enable those groups to provide their appraisal of the Lists. New survey forms will be developed whenever new Lists are created.

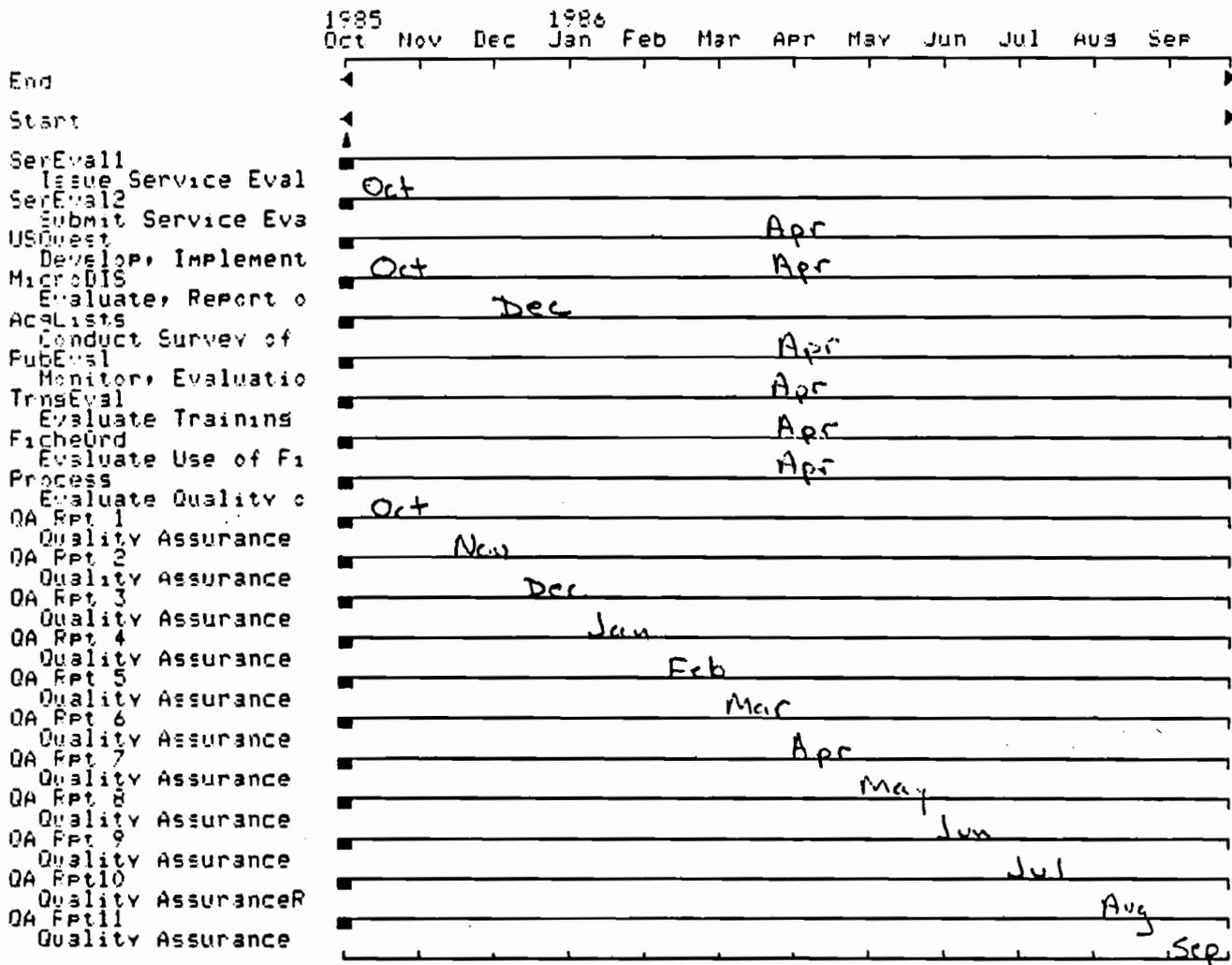
Publications -- Survey forms for ARDA 12:2 are ready to be included with that issue's mass distribution in December 1985. During the FY 1986 period, six special bibliographies are planned and a questionnaire for each issue will be developed and distributed.

Training -- Once a training program has been established questionnaires will be issued at the end of the program for users

Exhibit C.8.1 - FY86 Quality Assurance Schedule

Project: OAP1a86

13-Dec-1985

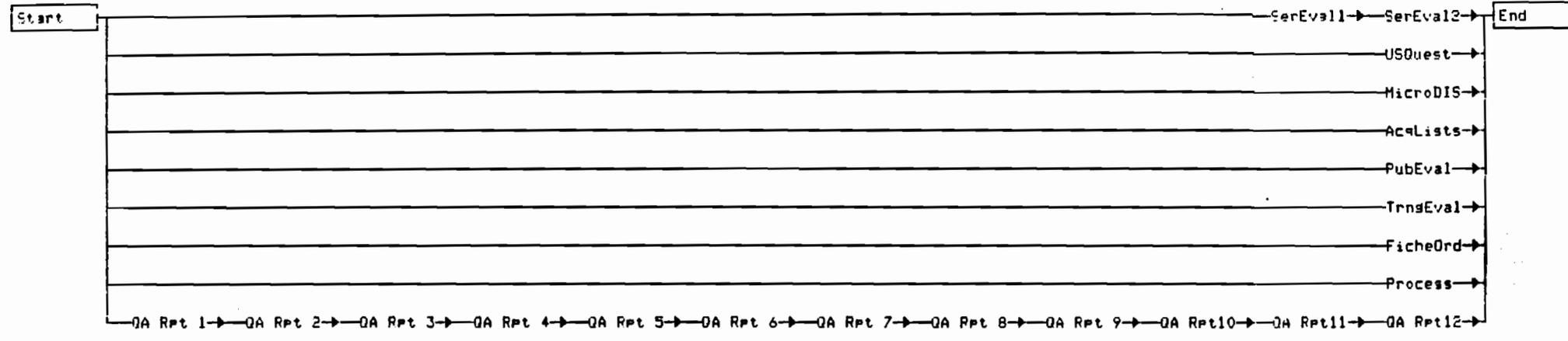


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Project: OAPIn86

13-Dec-1985

FProject: OAPIn86



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to respond. In addition, participants will be interviewed following the classes.

Standing Orders -- Filming questionnaires have been developed and will be periodically sent along with fiche shipments to standing order recipients.

Processing -- Database correction forms will continue to be used for documenting record problems.

## C.9 MANAGEMENT

The statement of work outlining management requirements spans a wide range of tasks designed to ensure the effective utilization of resources to meet the many and varied tasks described in above sections of this report. The complex and dynamic nature of this evolving activity mandates a project management approach that is both responsive to the specific contract requirements while adapting CDIE/DI needs to an on-going process as its overall program goals become more clearly defined.

Specifically, management's responsibility is to:

- o Organize the staff, equipment and other resources to ensure that all work is performed in an efficient and cost effective manner;
- o Institute controls, reporting mechanisms, and quality control procedures to monitor work and address problem areas by taking prompt and positive action to or meet changing program requirements.
- o Anticipate and resolve problems;
- o Constantly seek better and more efficient ways to organize and manage the work of the DIHF.

### C.9.1 FY85 Accomplishments

During the initial year of the project, the following activities were accomplished:

#### C.9.1.1 Staff Organization

To reflect the change in project administration from the previous contractor to LTS, a redesign of the project staff along functional as well as prime/subcontractor relationships was instituted. This was done to incorporate specific assignments of individuals who belong to different corporate organizations comprising the DIHF project team yet who have specific functional capabilities required to fulfill project tasks. Exhibit C.9.1 is the organizational chart that reflects how the project was structured during the first year of contract operations.

#### C.9.1.2 Reporting

To provide CDIE/DI management with the necessary data and information on DIHF activities, progress reports were submitted each month during the first year. These reports contained both a narrative portion describing work performed during the report period as well as specific comments made in response to the quality assurance report citing operational problems or deficiencies. In addition, a comprehensive statistical report citing actual progress measured against requirements was submitted. (See Section C.8 Quality Control for additional

information on reporting). Exhibit C.9.2 is the summary report for the first year of operation and describes the functional activities on which data is collected and analyzed. The use of SYMPHONY and its graphics capabilities permitted a wider range of statistical, tabular and graphic analyses to be presented thus enhancing the understanding and readability of the information being reported each month.

#### C.9.1.3 Operational Plans

The development and publication of a Master Five-Year Plan was initiated with its functional segments submitted for review and approval by CDIE. No single document outlining an overall plan was prepared due to the constant evolution of CDIE plans and programs. The CDIE reorganization that took place in the fall of 1984, DIHF's assumption of the acquisition function in the spring of 1985, the uncertainty over DIHF's specific role in the ODIS effort, the restructuring of the R&RS support contract and yet-to-be-announced plans to merge CDIE offices/functions in response to proposed moves and budget restraints did not create an atmosphere in which a comprehensive plan could readily and efficiently be agreed upon.

A series of detailed briefings were given to CDIE personnel designated to serve in contract liaison capacities early during FY1985. These briefings were designed to improve coordination at the functional level as well as at the project management level. Subsequent personnel changes at CDIE eliminated this strategy as an operational management procedure thus further impacting the initial plans developed for the project.

Specific procedures and plans were developed later and submitted individually by functional component as memorandum and were incorporated accordingly into the DIHF Operations Manual.

#### C.9.1.4 Facilities Management

During the year, significant concern has been expended regarding the status of the building housing the DIHF. This was due to the physical damage done to the building as a result of construction of a high rise building adjacent to DIHF. Cracks in the exterior walls, a hollow cavity beneath the building created by draining water, and adverse working conditions created concern about the safety and continued use of the building as a facility site. Efforts were expended to investigate alternate sites pending the satisfactory resolution of engineering approaches to rectify the damage. Steps taken to date, and as reported by certified structural engineers, indicate that the settling of the foundation has stopped and that further damage is not anticipated. Work to correct internal damage was performed in September and October, 1985 with external work yet to be scheduled.

In addition, a DIHF annex was established in the Rosslyn Plaza complex to house DIHF and other contractor staff in anticipation

Exhibit C.9.2 - FY 1985 Cumulative Statistics - DIHF Operations

\* Output levels specified by AID's Statement of Work

*YEAR/MONTH		OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
<b>A. ACQUISITION REPORTS</b> (DIL/DIC POP/OFF)													
*****													
1. Titles Ordered		16	7	14	16	16	32	108	54	15	27	9	18
2. Ordered FY 85		16	23	37	53	69	101	209	263	278	305	314	332
3. Titles Received		9	6	4	3	1	6	27	64	18	22	40	19
4. Titles Rcvd FY 85		9	15	19	22	23	29	56	120	138	160	200	219
5. Received to Date		429	435	439	442	443	449	476	540	588	580	620	639
6. Obligated Current Mo.	(Est. Dollars)	4,974	4,055	4,163	20,438	5,145	4,840	6,549	2,066	1,063	1,946	739	1,223
7. Obligated FY to Date	(Est. Dollars)	4,974	9,029	13,192	33,630	38,775	43,615	50,164	52,230	53,293	55,239	55,978	57,201
8. Spent Current Mo.	(In Dollars)	0	2,270	3,204	2,496	2,166	4,839	2,463	2,761	6,236	1,294	896	3,720
9. Spent FY to Date	(In Dollars)	0	2,270	5,474	7,970	10,136	14,975	17,438	20,199	26,435	27,729	28,625	32,345
10. FY 85 Funds Not Obligated	(Est. Dollars)	70,026	65,971	61,808	41,370	36,225	31,385	24,836	22,770	21,707	19,761	19,022	17,799
<b>B. WAREHOUSE INVENTORY</b> OF PRINTED DOCUMENTS													
*****													
1. New Titles Rcv'd	(Not Recorded At This Time)									6		10	
2. Total Rbls. Rcv'd	" "									1,100		16,540	
3. Total Inventory Titles	" "									31,856		33,689	
4. Total Inventory Rbls.	" "									264,891		306,646	
5. Titles Deleted	(Not Recorded At This Time)									0		0	
<b>C. PROCESSING REPORT</b>													
*****													
1. Total Docs. in Que		17,434	17,434	17,584	17,584	17,434	17,434	16,759	16,909	17,059	17,059	17,209	16,609
2. Total Added to Que		0	150	0	225	0	0	150	150	0	150	150	0
3. Total Discarded From Que		0	0	0	0	0	300	0	0	0	0	0	0
4. Total Processed From Que		0	0	0	375	0	375	0	0	0	0	750	300
5. FD Docs. Processed		209	120	206	788	585	527	322	326	287	346	272	444
a. Added to DOCUMENT	2,500/208	94	50	143	317	194	138	141	229	186	285	137	279
b. Added to INV		115	70	63	471	391	389	181	97	101	61	135	165
c. Added to Uproc. Que		0	150	0	225	0	0	150	75	0	0	150	0
6. EN Docs. Processed		273	249	287	293	254	223	343	284	303	242	371	248
a. Added to DOCUMENT	2,500/208	230	178	256	215	93	89	293	277	281	218	237	231
b. Added to INV		43	71	31	78	161	134	50	7	22	24	134	17
c. Added to Uproc. Que		0	0	0	0	0	0	0	75	0	150	0	0
7. Total Docs. Proc. DOCUMENT		324	228	399	532	287	227	434	506	467	503	374	510
8. Total Docs. Proc. INV	4,500/375	158	141	94	549	552	523	231	104	123	85	289	182
9. Total Docs. Processed		482	369	493	1081	839	750	665	610	590	588	643	692
10. No. of Charges to DORD		789	423	190	418	1,054	884	1,589	259	298	409	560	349
11. No. of Dupl. Found	(Not Recorded At This Time)					881	553	361	494	143	132	180	176
12. New Que Total		17,434	17,584	17,584	17,434	17,434	16,759	16,909	17,059	17,059	17,209	16,609	16,309
<b>D. ABSTRACTING/INDEXING</b>													
*****													
1. Abstracts Added to DOCUMENT		49	115	45	140	135	102	136	129	112	176	166	162
a. DIHF Generated Abstracts		49	109	45	130	112	102	136	115	107	164	103	156
1. Project Documents		47	37	35	86	78	101	123	47	54	92	56	73
a. New 1984 Des. Docs.	200/17	1	9	7	8	7	13	17	12	7	12	12	22
b. Pre-1984 Des. Docs.	100/8	1	7	5	7	3	11	16	5	3	0	4	6
c. Evaluations		45	21	23	71	68	77	90	30	44	80	40	45
2. Amendments		1	39	8	7	23	1	5	4	5	4	5	53
3. Technical Documents		1	33	2	37	11	0	8	64	48	68	42	30
b. Blitted Author-prep. Abs.		0	6	0	10	23	0	0	14	5	12	63	6
1. Project Documents		0	0	0	0	0	0	0	1	0	1	2	2
a. New 1984 Des. Docs.		0	0	0	0	0	0	0	1	0	1	0	2

Exhibit C.9.2 (Cont'd)

b. Pre-1984 Des. Docs.		0	0	0	0	0	0	0	0	0	0	0	0
c. Evaluations		0	0	0	0	0	0	0	0	0	0	0	0
2. Technical Documents		0	6	0	10	23	0	2	13	5	11	61	4
2. Abs. Added Only to PROJECTS		1	5	0	3	8	36	62	5	32	19	15	8
a. DIHF Generated Abs.		1	5	0	3	8	4	8	5	32	19	15	7
b. Edited Author-prep. Abs.		0	0	0	0	0	32	54	0	0	0	0	1
3. Total No. Abs. Added to DIS		50	120	45	143	143	138	198	134	144	195	181	170
a. DIHF Generated	1,500/125	50	114	45	133	120	106	144	120	139	183	118	163
b. Edited Author-prep. Abs.	100/8	0	6	0	10	23	32	54	14	5	12	63	7
4. Documents Indexed Only	4,300/358	296	247	312	638	390	404	464	580	287	568	466	467
a. Project Documents		189	150	151	482	245	294	337	168	144	188	193	309
b. Technical Documents		107	97	161	156	145	110	127	412	143	381	273	158
5. Documents Reindexed	500/42												
6. Proposed Thes. Changes	300/25	0	6	3	5	3	12	4	4	70	1	2	4

(Not Recorded At This Time)

E. Data Base Statistics  
(Cumulative to Date)

*YEAR/MONTH	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. DOCUMENT	36,158	36,540	36,947	37,499	37,805	38,049	38,597	39,126	39,640	40,185	40,590	41,112
2. INVENTORY	7,396	7,542	7,641	8,206	8,772	9,305	9,544	9,658	9,785	9,878	10,160	10,342
3. SERIALS	1,041	1,042	1,045	1,046	1,046	1,055	1,061	1,063	1,065	1,066	1,068	1,068
4. FPOFD	6,292	6,522	6,523	6,528	6,539	6,549	6,603	6,605	7,007	7,021	7,032	7,033
5. CHALOG	570	610	641	691	763	845	992	1,054	1,087	1,136	1,145	1,195
6. INSECT. AUTHORITY	3,885	3,924	3,976	4,043	4,075	4,132	4,192	4,285	4,334	4,379	4,412	4,466

F. CATALOGING

*YEAR/MONTH	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. CCIC												
a. Non-AID	0	0	0	0	0	0	0	0	0	0	0	0
b. AID	72	0	0	0	0	0	62	0	0	0	0	9
2. CHALOG DB												
a. Orders Cataloged	17	6	21	17	1	11	14	44	30	12	28	25
b. Backlog Processed (Total)	0	0	0	0	0	0	1	17	1	30	1	5
(1) Acceptances	0	0	0	0	0	0	1	0	0	8	1	5
(2) Rejections	0	0	0	0	0	0	0	17	1	22	0	0
c. Gifts Cataloged	0	0	0	0	0	13	21	7	2	20	1	22
d. Retrospective Cataloging	3	14	6	26	62	24	11	7	13	9	0	3
e. Total Cataloged	20	20	27	43	63	48	47	58	45	49	30	55
f. FY 1985	20	40	67	110	173	221	268	326	371	420	450	505
3. Call Nos. Added to DCRD	3	15	17	1	5	18	12	2	7	28	12	11

G. MAILING LIST MAINTENANCE

*YEAR/MONTH	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. ARDA Address Transactions												
a. Additions	4	1	16	7	14	4	5	3	2	5	14	3
b. Modifications	12	4	24	6	8	2	3	0	2	3	1	2
c. Deletions	6	0	2	2	1	1	8	3	0	0	2	7
2. Total No. ARDA Recipients	7,309	7,310	7,324	7,329	7,342	7,345	7,342	7,342	7,344	7,349	7,361	7,367
3. Requests for ARDA Labels												
a. Number of Requests	0	0	0	1	0	1	0	0	0	0	0	0
b. Total No. of Labels												
ARDA Distribution	7,500 Per Is.	0	0	6,565	0	1,094	0	0	0	0	0	0
4. Recs. for (Non-ARDA) Subsets												
a. Number of Requests	0	0	0	0	0	0	2	4	5	0	0	0
b. Total No. of Labels	0	0	0	0	0	0	3,000	670	3,142	0	0	0
5. Recs. for ROP/Off Labels (J)												
a. Number of Requests	0	1	1	2	0	1	1	1	3	0	2	0
b. Total No. of Labels	0	66	66	132	0	63	66	62	208	0	63	0

H. PUBLICATIONS

\*YEAR/MONTH VCL.12:1 VCL.12:2 VCL.12:3 VCL.12:4  
\*\*\*\*\*

1. AFDA

a. No. of Docs. Abs. 600/150 Is. 150 150  
 b. No. of Abs. on Minisist 150 150  
 c. Essay review/approval 8/15/84  
 d. Date to Printer 1/28/85  
 e. Date From Printer 2/14/85  
 f. Date Mailed

g. No. of Printed Copies 7,500 Per Is. 7,000

2. Special Bibliographies

a. No. of Bibliographies 6/ 1  
 b. No. of Copies per Bib. 1,000 Per Is. 3,900

3. Acquisitions Lists

a. No. of Acq. Lists Distr. 12/ OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG SEP  
 b. No. of Copies/Issue 3,000 Per Is. 25 25 25 25 0 30 30 40 90 40 190

I. FILMING REPORT

\*YEAR/MONTH OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG SEP  
\*\*\*\*\*

1. No. Docs. Prepared for Filming

a. FD Docs. Sent to Filming 211 294 227 296 453 307 337 465 339 431 208 188  
 b. FN Docs. Sent to Filming 127 61 34 131 238 167 160 137 108 166 46 83  
 c. Total Frames Prepped 84 233 193 165 215 140 177 328 231 265 162 105

2. Total Docs. Filmed: 5,000/415 19,267 22,308 22,821 27,737 22,949 30,946 26,038 33,465 33,543 36,210 22,638 22,704  
 a. FD's: 266 276 150 313 488 309 408 367 404 374 348 216

(1) Documents 169 65 24 85 276 175 227 169 67 136 161 53  
 (2) Total No. of Fiche 195 131 47 125 311 224 406 210 94 194 190 86  
 (3) Total No. of Frames .7,234 8,399 3,233 7,736 9,923 10,944 26,018 8,570 4,948 10,499 7,392 5,789

b. FN's:  
 (1) Documents 97 211 126 228 212 134 181 198 337 238 187 163  
 (2) Total No. of Fiche 207 309 169 367 329 233 225 267 558 404 288 278  
 (3) Total No. of Frames 13,086 16,416 9,377 23,882 19,383 15,597 10,271 12,956 36,226 25,439 17,144 17,640

3. Dupl. Fiche Production:

a. No. of Masters 402 440 216 492 640 457 631 477 662 598 478 364  
 b. Total FD Fiche Dupl. 975 665 235 625 1,555 1,120 2,030 1,050 470 970 950 430  
 c. Total FN Fiche Dupl. 2,070 3,090 1,690 3,670 3,290 2,330 2,250 2,670 5,580 4,040 2,880 2,780  
 d. Total (FD&FN) Fiche Dupl. Monthly 3,045 3,745 1,925 4,295 4,845 3,450 4,280 3,720 6,050 5,010 3,830 3,210

4. Fiche Distribution

a. Total (R&FD) Filmed Since October 1984 3,045 6,790 8,715 13,010 17,855 21,305 25,585 29,305 35,355 40,365 44,195 47,405  
 b. Fiche Set Distribution /14 15 15 15 15 15 15 15 15 15 15 15

FD - DME Distributed

a. No. of Documents 169 65 24 85 276 175 227 169 67 136 161 53  
 b. No. of Fiche 195 131 47 125 311 224 406 210 94 194 190 86  
 c. No. of Fiche Distr. (5 Sets) 975 665 235 625 1,555 1,120 2,030 1,050 470 970 950 430  
 d. No. of Fiche FY 1985 975 1,630 1,865 2,490 4,045 5,165 7,195 8,245 8,715 9,685 10,635 11,065

Distribution

DIC (105) 10/31 11/30 12/31 1/31 2/28 3/29 4/30 5/31 6/30 7/31 8/31 9/30  
 Ashton (2 copies) 10/31 11/30 12/31 1/31 2/28 3/29 4/30 5/31 6/30 7/31 8/31 9/30  
 Paslar 10/31 11/30 12/31 1/31 2/28 3/29 4/30 5/31 6/30 7/31 8/31 9/30  
 DMEF 10/31 11/30 12/31 1/31 2/28 3/29 4/30 5/31 6/30 7/31 8/31 9/30

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Exhibit C.9.2 (Cont'd)

FN - Date Distributed

a. No. of Documents	97	211	126	228	212	134	181	198	337	238	187	163
b. No. of Fiche	207	309	169	367	329	233	225	267	558	404	288	278
c. No. of Fiche Distr. (10 Sets)	2,070	3,090	1,690	3,670	3,290	15,597	10,271	12,956	36,226	25,439	17,144	17,640
d. No. of Fiche FY 1985	2,070	5,160	6,850	10,520	13,810	29,407	39,678	52,634	88,860	114,299	131,443	149,083

Distribution

DIC/105	10/31	11/30	12/31	1/31	2/28	3/29	4/30	5/31	6/30	7/31	8/31	9/30
Cairo	10/31	11/30	12/31	1/31	2/28	3/29	4/30	5/31	6/30	7/31	8/31	9/30
Costa Rica	10/31	11/30	12/31	1/31	2/28	3/29	4/30	5/31	6/30	7/31	8/31	9/30
Honduras	10/31	11/30	12/31	1/31	2/28	3/29	4/30	5/31	6/30	7/31	8/31	9/30
Jakarta	10/31	11/30	12/31	1/31	2/28	3/29	4/30	5/31	6/30	7/31	8/31	9/30
Pakistan	10/31	11/30	12/31	1/31	2/28	3/29	4/30	5/31	6/30	7/31	8/31	9/30
World Bank	10/31	11/30	12/31	1/31	2/28	3/29	4/30	5/31	6/30	7/31	8/31	9/30
Zaire	10/31	11/30	12/31	1/31	2/28	3/29	4/30	5/31	6/30	7/31	8/31	9/30
IDRC	10/31	11/30	12/31	1/31	2/28	3/29	4/30	5/31	6/30	7/31	8/31	9/30
DIHF	10/31	11/30	12/31	1/31	2/28	3/29	4/30	5/31	6/30	7/31	8/31	9/30

5. Tape Distribution

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Cairo	0	0	0	0	0	0	0	0	0	0	0	0
IDRC	0	0	1	0	0	0	0	0	1	0	0	0

6. Index Distribution

(Mechanism Not Yet in Place)

7. Other AID Micrographic Support Activities

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Science Advisor												
Documents												
Fiche												
Frame												
AID/REST (K25)												
Documents		137										
Fiche		142										
Frame		13,426										
AID/Philippines (X1)												
Documents	388											
Fiche	609											
Frame	39,177											

8. Filming Grand Totals:

a. Monthly Production

(1) Documents	654	413	150	313	488	309	408	367	404	374	348	216
(2) Masters	1,011	582	216	492	640	457	631	477	652	598	478	364
(3) Frames	59,497	38,241	12,610	31,618	29,306	26,541	36,289	21,526	41,174	35,938	24,536	23,429
(4) Diazos	3,654	7,295	1,925	4,295	4,845	16,717	12,301	14,006	36,696	26,409	18,094	18,070

b. FY 1985 Production

(1) Documents	654	1,067	1,217	1,530	2,018	2,327	2,735	3,102	3,506	3,880	4,228	4,444
(2) Masters	1,011	1,593	1,809	2,301	2,941	3,398	4,029	4,506	5,158	5,756	6,234	6,598
(3) Frames	59,497	97,738	110,348	141,966	171,272	197,813	234,102	255,628	296,802	332,740	357,276	380,705
(4) Diazos	3,654	10,949	12,874	17,169	22,014	38,731	51,032	65,038	101,734	128,143	146,237	164,307

Exhibit C.9.2 (Cont'd)

J. USER SERVICES (See Section M)	*YEAR/MONTH *****	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. No. of Docs. Sent By Request:													
a. Priority I (1 Day)	14,000/1,167	840	1,230	890	804	788	668	1,638	1,918	3,216	2,748	1,237	1,417
b. Priority II (3 Days)	3,000/250	400	197	269	205	360	315	403	738	285	682	804	241
c. Priority III (7 Days)	7,000/583	406	205	476	213	129	210	309	690	739	717	932	563
2. Type of Copy Requested													
a. Fiche (dialzo copies)	3,500/292	150	145	97	11	251	101	208	205	169	343	466	78
b. Paper Blowbacks	7,500/625	640	619	730	108	512	616	918	1,442	2,192	1,769	1,439	1,147
c. Paper Copy in Stock		871	895	807	94	514	477	1,237	1,701	1,899	1,883	986	996
K. PRODUCTION THROUGHPUT (AVERAGE PER DOC.)													
1. Cataloging Mean Time (Days)		17	19	10	21	25	12	10	13	12	12	14	13
2. Filing Mean Time (Days)		18	10	7	17	14	13	13	10	8	10	7	15
3. Abstracting Mean Time (Days)		137	236	224	251	238	208	194	167	168	242	136	174
4. Indexing Mean Time (Days)		136	63	100	85	69	38	50	155	81	82	66	85
5. User Service Mean Time		(See Section J.)											
L. ADP SYSTEM USAGE													
	*YEAR/MONTH *****	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. No. Authorized Users													
2. No. of Dial Up Ports	14/14	12	12	12	12	12	12	12	12	12	12	12	12
3. CPU Usage (All Groups)													
a. No. of Sessions		6,152	2,565	741	3,699	3,222	4,147	1,415	4,827	4,604	4,041	5,603	6,052
b. Total CPU Hours		278	151	40	281	302	402	99	343	353	299	375	479
c. Total Logon Hours		112	50	682	440	3,633	5,466	1,231	4,907	4,879	4,159	7,031	7,452
4. Printer Usage													
a. No. of Print Sessions		3,796	1,741	510	2,439	2,131	3,119	907	3,023	3,163	2,475	3,680	3,669
b. Total Lines Printed	33mil/2.8mil	1.9mil	1.1mil	355,190	1.4mil	1.2mil	1.5mil	445,778	1.4mil	1.4mil	1.2mil	2.1mil	2.2mil
c. Total Sectors Used		742,944	407,056	161,352	630,872	433,716	597,552	175,080	541,768	511,852	422,640	904,240	786,676
M. DETAIL USER REPORT (FROM AMISMENU)													
N. STAFF UTILIZATION													
O. FINANCIAL MANAGEMENT REPORT													
AID/DHF PROGRESS REPORT FOR THE MONTH OF: SEPTEMBER 1985													
* Output levels specified by AID's Statement of Work													
A. ACQUISITION REPORTS (DILL/DIC POP/CF)	*YEAR/MONTH *****	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Titles Ordered		16	7	14	16	16	32	108	54	15	27	9	18
2. Ordered FY 85		16	23	37	53	69	101	209	263	278	305	314	332
3. Titles Received		9	6	4	3	1	6	27	64	18	22	40	19
4. Titles Rec'd FY 85		9	15	19	22	23	29	56	120	138	160	200	219
5. Received to Date		429	435	439	442	443	449	476	540	558	580	620	639
6. Obligated Current Mo.	(Est. Dollars)	4,974	4,055	4,163	20,438	5,145	4,840	6,549	2,056	1,053	1,946	739	1,223
7. Obligated FY to Date	(Est. Dollars)	4,974	9,029	13,192	33,630	38,775	43,615	50,164	52,230	53,293	55,239	55,978	57,201
8. Spent Current Mo.	(In Dollars)	0	2,270	3,204	2,496	2,166	4,839	2,463	2,761	6,236	1,294	896	3,720
9. Spent FY to Date	(In Dollars)	0	2,270	5,474	7,970	10,136	14,975	17,438	20,199	26,435	27,729	28,625	32,345
10. FY 85 Funds Not Obligated	(Est. Dollars)	70,026	65,971	61,808	41,370	36,225	31,385	24,836	22,770	21,707	19,761	19,022	17,799

of the pending CDIE move from SA-14 to SA-18 creating the need have space available for CDIE direct hire personnel.

A major move of warehouse stock from the DIHF to the CDSI warehouse in north Rockville took place simultaneously with the elimination of the WIMP data base and assignment of warehouse locator codes on DOCRD and INV.

### C.9.2 FY86 Plans

#### C.9.2.1 Task Planning/Tracking

During FY86, the use of a project management tracking system (Harvard Total Project Manager) will be implemented. Using this system, the tasks described in this report, in each functional area, can be tracked easier and the status on progress reported more readily. In addition, this tool will permit CDIE/LTS joint decision-making on the realignment of task priorities in response to new or unanticipated requirements.

#### C.9.2.2 Operational Effectiveness

With better data being provided through more consistent reporting, efforts will be undertaken to reorganize the staff and to apply resources to improve operational effectiveness. Interaction with the R&RS staff, the expansion of the DIHF Annex facility, the anticipated greater demand for support as the ODIS program initiatives being to materialize and the expansion of DIHF-generated outreach efforts will require the careful and controlled expenditure of resources. Maximum effort will be given to make certain that our actions meet specifically defined contract specifications as well as the larger, overall goals and objectives being stressed in CDIE's operational plans.

#### C.9.2.3 Comparative Pricing

To ensure that all vendors providing support on behalf of the DIHF are providing services on a competitive basis, a resolicitation of bids for micrographics filming, messenger services, maintenance, and general supplies will be undertaken.

In addition, the transfer of certain budget expenditures from subcontractors to LTS budget line items will take place in accordance with previously negotiated conditions that were agreed upon at the time of contract award.

These steps are being taken as further actions to ensure the completion of proposed and obligated tasks within the budget constraints now in effect.

#### C.9.2.4 Reporting

No major plans are proposed to change the existing reporting procedures, other than those described in other sections of this report (e.g., reporting of User Services statistics each month by region, as opposed to individual country). However, changes as

requested will be made and the use of a plotter to provide better management reports will be instituted. Information from LTS, available in SYMPHONY or LOTUS 1-2-3 format, will be given to CDIE for use in its own management analysis models used to monitor DIHF fund expenditure by phase, task, etc.

#### C.9.2.5 Meetings

Participation in CDIE Senior Staff meeting as a means to coordinate DIHF activities with other CDIE operations and contractors will continue. In addition, more frequent meetings with the Project Officer will be instituted in lieu of the change in CDIE Direct Hire staff that prevented the continuation of sub-project meetings among subordinate staff members at DIHF and CDIE during FY85.

Planning meetings will be held early each month with project status and review sessions scheduled later when the written progress and statistical reports are available.

#### C.9.2.6 Facilities

Repairs of the external damage to the DIHF building made during FY85 are scheduled to be made during FY86. This will entail close coordination to protect the physical security of the HP/3000 computer, Bruning fiche duplicator and microcomputer laboratory whose locations within the facility, while not in jeopardy at present, could be temporarily affected as work is performed. Alternate plans will be made to ensure minimum or no down time of computer or fiche duplication services.

The DIHF Annex will be expanded in January, 1986 to provide additional space for CDIE contractors and to create a more efficient operational environment for the existing tasks being performed there. A cable link between CDIE offices and the DIHF annex will be installed to permit the installation of a PC-based LAN and to permit WANG/OIS System Management to take place from WANG stations in the DIHF Annex.

## D. RESOURCE UTILIZATION

### D.1 Personnel Resources

Exhibit D.1 presents, in tabular form, the total number of hours spent by project personnel in carrying out the many functions cited above.

### D.2 Financial Expenditures

Exhibit D.2 provides detailed information on total project expenditures, by phase and task.

Exhibit D.2 is a comparative analysis of actual first year expenditures, by phase and task and by contractor, as compared to authorized expenditures. The costs reflect a greater expenditure rate, especially for Phase II: Core Operational Costs than originally envisioned. These costs, however, include expenditures authorized by the Contracts Office but which are not reflected in the authorized budget which is yet to be finally negotiated.

### D.3 Financial Projections

As requested, a projection of proposed FY86 expenditures has been prepared and is included as Exhibit D.3.

During FY86, a revised budget reflecting projected FY87 expenditures will be submitted for inclusion in CDIE budget planning. Outyear budgets, for FYs 88 and 89, will also be submitted during the second quarter of FY86 following the final negotiation of contract modifications to reflect the additional scope of work and funding authorized during FY85.



Exhibit D.1 (Cont'd)

Company/Employee AFR (B) ASIA (C) CTCT(D) AFRES(E) NE (F) LAC (G) S&T (H) FFP/insg(I) Total

LTS

Biers	7		8	12	18					
Bloomberg	1		1	1	1					45
Booth	1		1	1	2					4
Total LTS	9	0	10	14	21	0	0	0		54

CDSI

Morgan	48		39							
Urie										87
Wardell										0
Total CDSI	48	0	39	0	0	0	0	0		87

CSG

Clarke	15		10	26	55					
Ested					168					186
Herring	44			116						168
Heyden			24	24	112					168
Holland										168
Jones	14		12		27					0
King	11		12	38	32					53
Moore				32	184					93
Payne			152							136
Perry				152	8					152
Rielley										168
Summers, A.										0
Summers, I.	116			48	4					168
Total CSG	208	0	210	428	662	0	0	0		1588

Monthly Cumulative

October 84	10		552							
November 84	979	80	86		128					562
December 84	486	198	184		192					1265
January 85	112	119	455	182	751					972
February 85	137	364.75	371		855	8				1627
March 85	387	99	622		743					1727.75
April 85	234	28	73		1274.5					1851
May 85	65.5	21	6	3	1666	4				1613.5
June 85	436	275	0	584	461					1761.5
July 85	389	478	35	588	294					1676
August 85	395.5	78	287.5	364	643	2				1678
September 85	257	0	259	442	683	0	0	0		1762
TOTAL FY-85	3888	1716.75	2938.5	2875	7592.5	14	0	0		18136.75