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Mailing List

Table of Contents

CHAPTER A: Background of AID Document and Information
Handling Facility..... 1-1

CHAPTER B: Overview of Facility
B.1 - Summary of Scope of Work..... 2-1
B.2 - Relationship to PPC/CDIE and M/SER/PA/RM..... 2-2
B.3 - DIHF Operations Environment..... 2-3

CHAPTER C: Progress and Plans, by Function..... 3-1
C.1 - Systems Development, Operations, and Maintenance..... ~~3-2~~ 6
C.2 - Acquisitions..... ~~3-15~~ 21
C.3 - Processing..... ~~3-23~~ 27
C.3.1 - Cataloguing..... ~~3-25~~
C.3.2 - Abstracting/Indexing..... ~~3-31~~
C.3.3 - Thesaurus Maintenance..... ~~3-35~~
C.4 - User Services..... ~~3-38~~ 39
C.5 - Micrographics..... ~~3-43~~ 43
C.5.1 - Institutional Memory..... ~~3-43~~
C.5.2 - Agency Records Management..... ~~3-46~~
C.6 - Publications and Outreach..... ~~3-52~~ 47
C.7 - Training and User Education..... ~~3-57~~ 51
C.8 - Quality Assurance..... ~~3-74~~ 60
C.9 - Management..... ~~3-84~~ 63

CHAPTER D: Resource Utilization..... 4-1
D.1 - Personnel Resources..... 4-1
D.2 - Financial Expenditures..... 4-1
D.3 - Financial Projections..... 4-1

List of Exhibits

Exhibit C.1 - Systems Development Group FY 1986 Plans..... 3-5
Exhibit C.5.2.1 - Bureau Microfiche Summary Report..... 3-47
Exhibit C.5.2.2 - FY 1985 Microfiche Production Statistics.. 3-53
Exhibit C.5.2.3 - Inventory of Geobureau Installed Microfiche
Equipment..... 3-54
Exhibit C.5.3.4 - Microfiche Volume Estimates for FY 1986-89 3-59
Exhibit C.5.3.5 - Documents to be Filmed in FY 1986..... 3-60
Exhibit C.5.3.6 - Cumulative and Projected Document
Distribution..... 3-61
Exhibit C.8.1 - FY 1986 Quality Assurance Schedule..... 3-81
Exhibit C.8.2 - FY 1986 Quality Assurance Plan..... 3-82
Exhibit C.9.2 - FY 1986 Cumulative Statistics - DIHF
Operations..... 3-86
Exhibit D.1 - Personnel Hours by Activity..... 4-2
Exhibit D.2 - FY 1985 Financial Summary..... 4-4
Exhibit D.3 - FY 1986 Financial Projections..... 4-7

CHAPTER 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 AID's first efforts in the mid-1970's to systematically manage its institutional memory of project-generated experiential and technical information. These efforts were outlined in the program concept paper 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 3-year contract called for the establishment of the AID/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 database 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 a Tool in Development" project were found, with some minor variations, to still be valid. A new 5-year contract for continuing the 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 included:

1. Assisting M/SER/MO/CRM 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. Developing and supporting a series of strategies designed to expand the knowledge of and use of resources available to AID personnel through the newly-established CDIE;
3. Instituting 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 providing 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 Removing from the DIHF contract and incorporating into another CDIE contract, 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 second year of contract management responsibility (FY 1986). It also describes its plans for the next (FY 1987) year of operations.

CHAPTER B. OVERVIEW OF FACILITY

B.1. Summary of Scope of Work

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 Cataloguing
 - 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 to microfiche of key project and technical records, as well as official project records
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 promptly resolve issues
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 stage, which reflects the new and expanded scope of the DIHF, occurred during Year 1. Existing and on-going operations continue, ensuring uninterrupted support. As new plans are developed and approved, they will slowly be introduced and become operational.

B.2. Relationship to PPC/CDIE and M/SER/MO/PA/RM

In carrying out its contractual obligations, while simultaneously meeting the evolving goals and objectives of CDIE, the DIHF has continued to be sensitive to the need that its operating procedures and objectives be consonant with those of CDIE and M/SER/MO/PA/RM.

B.3 DIHF Operations Environment

The DIHF serves as a central point for the receipt, processing, file maintenance and dissemination of project-related and AID-sponsored technical documentation. The DIHF must be sensitive to a number of operational policies and problems which include:

1. The distribution of "key" project documents has changed. Since project implementation and funding now occur at the mission level, the documents are more difficult to obtain.
2. The requirement that AID planners review past experiences which are found in the AID's "institutional memory". CDSS review and planning guidelines require that program and project designers review AID's past successes and failures before determining long-range development strategies for a region or area in order that past mistakes not be repeated.
3. The AID policies regarding advanced technologies (microcomputers, telecommunications links, etc.) are still evolving and may be subject to change.
4. Internal AID guidelines for many administrative tasks are not consistent from office to office for such activities as mail handling, information systems, data sharing, report preparation procedures and reviews.

It is anticipated that these issues will mandate even greater use of development information in the planning, design, and evaluation process, and that CDIE and DIHF must be able to meet this demand. Linking this operation closer to the overall goals and objectives of PPC/CDIE has been a major focus of all DIHF efforts during FY 1986. It has also involved developing a better coordinated effort among CDIE contractors, AID/W and USAID offices, and CDIE constituent groups.

It is within this context that the second year of DIHF operations under LTS leadership has operated. Details of the progress made this year in each area of project operations are presented in the following sections.

CHAPTER C: PROGRESS AND PLANS, BY FUNCTION

In the following sections of this chapter, a description of FY 1986 activities for each functional area of DIHF operations is presented along with a statement on the anticipated plans for FY 1987. The areas of work are:

- . Systems Development, operations and maintenance
- . Acquisitions
- . Processing (including Cataloguing, Abstracting & Indexing, and Thesaurus Maintenance)
- . User Services
- . Micrographics
- . Special Publications
- . Training and User Education
- . Quality Assurance
- . Management

Interspersed throughout the various segments of this chapter are tables and charts designed to provide the reader with specific details on levels of performance. A summary of operational statistics for FY 1986 is presented in Section C.9. - Management.

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. In order to assure users are provided adequate automation services, SDG:

- a. Monitors micro and minicomputer equipment use
 - (1) resolves hardware problems - identifies constraints
 - (2) implements computer security and software standards
 - (3) recommends equipment improvement strategies
 - (4) initiates and reviews equipment acquisitions
 - (5) investigates applicability of product enhancements
- b. Develops new and enhanced software improvements
 - (1) MenuDIS front-end processor to MINISIS database software for public and other searchers of CDIE/DIS
 - (2) MicroDIS PC-based software with bibliographic modules applicable for use in overseas missions
 - (3) software processes for uploading and downloading CDIE/DIS data to and from microcomputer files
- c. Provides ongoing assistance to Research and Reference and other onsite and offsite user communities
 - (1) functions as a central "troubleshooting" service
 - (2) designs and develops procedures for new users
 - (3) conducts periodic reviews/assessments of services
 - (4) recommends improved automated processes
 - (5) obtains consensus on automation plans
- d. Maintains liaison with software vendors
 - (1) investigates applicability of new software products
 - (2) reviews/tests and recommends software acquisitions
 - (3) installs new computer software and new versions of existing software
 - (4) coordinates for training and orientation of users to capabilities/constraints of new software features

SDG serves also as a source of technical advice for internal and external AID/CDIE automation initiatives. During the past fiscal year, SDG developed recommendations for automated exchanges of information with other development organizations, computer linkages with the AID/IRM computer network, and new and improved mechanisms for obtaining additional development data already available on AID computer files.

C.1.1 FY 1986 Accomplishments

This section presents SDG activities in FY 1986 which respond to the FY 1986 Forward Plan. A core of (15) SDG operational tasks are listed first, followed by other SDG accomplishments.

This was the fifth year of DIHF/SDG's MINISIS support to the AID/CDIE community. The scope of operational database services we have developed over the years enabled SDG to transcend its loss of two key staff members with (collectively) 8 years of service to DIHF, and actually increase its support to the user community in a number of areas.

C.1.1.1 System Maintenance and Upgrades

- a. Converted Exchange account for MINISIS F.01.
- b. Changed cable pin assignments for MPE-V/T version.
- c. Installed SYSVIEW performance analysis software.
- d. Documented mark/delete problem w/HPWORD for HP action.
- e. Converted Bureau's SPL intrinsics to COBOL calls.
- f. Installed HPTREND performance reporting software.
- g. Installed HP/Predict to monitor equipment performance.
- h. Installed WORD/150 with LaserJet and Daisy printers.
- i. Provided for automatic initiation of daily backups.
- j. Wrote a report which totals individual computer use.
- k. Investigated alternatives for expanding port accesses.
- l. Connected HP/Laser printer to HP/3000 at the DIHF.
- m. HP installed new read heads on five disk drives.
- n. Archived files that hadn't been accessed since 1984.
- o. Investigated alternatives for improving CPU memory.
- p. Reviewed and installed terminal-emulation software.
- r. Tested data compression equipment at MUG conference.
- s. Installed LaserPlus software and tested DEST scanner.
- t. Documented system operational procedures.
- u. Developed and implemented COBOL programming standards.
- v. Reviewed MPE system free space and table assignments.
- w. Installed MINISIS F.01 release in May.
- x. Rewrote (20) DIHF/SPL intrinsics to COBOL.
- y. Installed electronic mail software for testing.

C.1.1.2 MenuDIS System Enhancements

- a. Completed development of MenuDIS software and demonstrated it to MUG85 attendees in October.
- b. Added an online survey module to MenuDIS for users to report on their experiences with the system.
- c. Added full-text display capabilities to MenuDIS.

C.1.1.3 Automated Library System

A modified module of the MicroDIS system was installed in the AID library to provide for circulation control and reporting. Public access to online library catalog records was provided via AID/MenuDIS. Initiation of more library system services is pending the establishment of a Library Task Force to coordinate their design.

C.1.1.4 AID/DIHF Profiles

A database structure of profile information was designed to include approximately 25 elements. The remainder of this activity was postponed.

C.1.1.5 Mailing List Database Development

- a. RECIPRD was modified for the ANE merger.
- b. Sets of distribution fields were added to RECIPRD for Occasional Papers.
- c. Coding schematae were developed and implemented for identifying sector interests, organizations.
- d. 340 records were transferred from EVALRD to RECIPRD. The EVALRD database was archived.
- e. 600 inactive S&T records were archived off RECIPRD.
- f. 25 fields in RECIPRD were inverted.
- g. Established methodology for transfer of ARDA records from REQUESTR to RECIPRD.

C.1.1.6 SDG MicroDIS Enhancements

- a. A pre-release of MicroDIS was demonstrated at MUG85.
- b. MicroDIS was installed in Cairo, Center for Privatization, and the office of AID/Science Advisor. Software was sent to Agroforestry project in Haiti.
- c. Version 1.1 of MicroDIS was developed and released. This enhancement included user security features and optional print formats.
- d. A circulation module of MicroDIS was modified and installed for specific AID/Library requirements.
- e. A configuration utility was written for MicroDIS.
- f. Developed a facility to effect a two-way transfer of records between MicroDIS and MINISIS, utilizing the batchin format of MINISIS.

C.1.1.7 Automation of Pre-Publication Processes

Automation of pre-publication processes for the Monthly Acquisitions List were completed in February, and three other publications were automated afterwards.

C.1.1.8 Technology Reviews

This task was performed throughout the year. A particular focus was on developments with Compact Disk/ROM, PROM, WORM. Developments were reported as they were identified.

C.1.1.9 Draft Document Tracking Requirements

- a. Completed the following in February:
 - a modified EPPSRD database for tracking reports
 - entry procedures for entering evaluation plan data
 - a sample Evaluation Plan (annual/quarterly) report
 - sample Evaluation Tracking Reports

- sample (annual and quarterly) reports for review
- b. Data entry began in March.

C.1.1.10 Acquisitions/Project Data Integration

- a. Completed an update of PROJAUTH in May.
 - Added 326 new projects.
 - Deleted 53 old project records.
 - Saved 302 old unmatched records.
- b. Recommended improvements to PROJAUTH update process.
- c. Modified PROJAUTH update procedures.

C.1.1.11 Database Integrations

This task was postponed, pending further definition.

C.1.1.12 OCLC and Other Database Conversions

This task was postponed, pending further definition.

C.1.1.13 Distributions of COM Indexes

- a. Five sets of (1985) COM index were prepared in March.
- b. 1st quarter (hardcopy) updates were printed in March.
- c. An 8-month (hardcopy) update was printed in September.

C.1.1.14 Cairo Tape Conversions

- a. A tape containing the Cairo database was converted in May to a MicroDIS format, via a MINISIS database used to invoke the AID/Thesaurus as a means of converting terms used by Cairo to AID standard terms.
- b. A second tape was converted in August. This tape contained data added to the database subsequent to the creation of the first tape.

C.1.1.15 REQUEST (REQ) database format changes

The REQ database was modified and became operational for the use of Research and Reference staff in March.

- Other FY 1986 Accomplishments Not Specified in Plan -

C.1.1.16 Performance Factors for HP/37

A report comparing the operations of 5 MINISIS processors on the HP/37 and HP/48 computers was completed in April. Copies of the report were distributed to Hewlett-Packard, CIDA, and the IDRC for distribution to interested user organizations. We concluded that the HP/37 could perform favorably as a dedicated processor for requirements of small systems (e.g. certain AID

missions) with a small number of databases, containing less than 10,000 records.

C.1.1.17 Micro-computer H/W and S/W support

- a. Converted AFR/DP document tracking system to dBase III and produced reports for review by acquisitions.
- b. Installed a Tiara LAN in Rosslyn after reviewing over 30 alternative local area network systems.
- c. Established and maintained support of Wang (connected to DIS system) and tested ICS telecommunications.
- d. Installed (Panasonic) printer on Wang.
- e. Installed Fastback harddisk backup utility.
- f. Installed Version 2.01 of Wang PC operating system.
- g. Installed HP Vectra for use with MicroDIS, cataloguing CDIE's classified document collection.
- h. Evaluated and returned HP110 portable micro to HP.
- i. Installed dBase III compiler.
- j. Installed 11 copies of Leading Edge Wordprocessing, 2 copies of Lotus 1-2-3, and 1 copy of Wordstar.
- k. Tested communications links between DI and the AID/ICS system, DI and Cairo, and DI and Quito.
- l. Developed procedures for the upload/download of DIHF HPWORD documents using Advance-Link. Downloaded 20 sets of country data for R. Baker.
- m. Updated WANG PC installation to permit remote access to information on DIS system.

C.1.1.18 Performance Factors for MINISIS

- a. Two performance software packages were installed whose outputs were analyzed on a routine basis.
- b. The observation that MINISIS uses all available CPU resources led to the initiative of asking HP systems support management to analyze the performance of MINISIS among several similar installations and report its common characteristics and constraints.
- c. Analyses of performance identified user processes that contributed to significant performance constraints, e.g. indexing a MINISIS Data Set, present/absent searches of a data set, etc. Corrective measures were implemented.

C.1.1.19 Cost/benefit analysis of system upgrade opportunities

During the fiscal year, the Hewlett-Packard corporation announced a major new system which will at this time only operate in an emulation mode for DIHF software. HP also announced plans to discontinue maintenance of several equipment peripherals used by the DIHF. As a result, SDG performed several 'impact' analyses which focused on the improvement of present processes on the HP/48.

- a. Downloading the abstract function to HP/150s at DIHF.

- b. Alternatives for improving tape backup operations.
- c. Acquiring a leased (2400 Baud) line.
- d. Alternatives for increasing the effective modem rates.
- e. Alternatives for providing electronic mail services.
- f. Alternatives for increasing CPU memory availability.
- g. Alternatives for disk storage.
- h. Alternatives for printer equipment.

C.1.1.20 Cost/benefit analysis of HP/150 Word

An analysis of DIHF abstractor requirements concluded that increased use of HP/150s by abstractors will not free up the CPU noticeably, but it will make more sessions available. The analysis noted that HP plans to promote HP/150 WORD for the future. Procedures for DIHF/Abstractors to use HP/150 Word were then implemented in September.

C.1.1.21 System Backup

Installed Fastback software utility for PC files. Both hardware and software improvements were recommended for improving system backup at the DIHF. In order to increase operator availability during the day, procedures were established which backup the system relative to the prior day, rather than prior to the last Friday.

C.1.1.22 Create modifications to geobureau files

- a. Space and maintenance savings were effected with the removal of redundant MFTRAK (over 50,000) records and elimination of code in Bureau programs that posted activity to this database.
- b. Preliminary specifications for establishing a Bureau-wide distribution database were drafted for review.
- c. The NEASTRD and ASIARD databases were merged, and programs, Btrees, and print formats were consolidated.

C.1.1.23 Coordination with IRM

A task breakdown was documented for establishing an RJE link with the AID/IRM computer network. A review was made of the AID/IRM report entitled, "IBM to HP Data Communications for Access to the AID Memory" was made.

C.1.1.24 Set up S&T and Bureau Files

- a. The NEASTRD database was merged into the ASIARD data base. In the process:
 - 10 Neareast programs were archived to tape;
 - 13 Neareast Btree files were purged;
 - 3 Neareast print formats were purged;
 - All Neareast job streams were removed, and job streams/print formats for Asia were modified.
- b. A new Financial Management Database was formed.

Programs, job streams and print formats were developed.

- c. The formation of S&T Bureau files is pending approval.

C.1.1.25 Database Administration (DBA) Functions

- a. Established DBA service representation by user group.
- b. Documented routine file maintenance procedures.
- c. Established coordination with DIHF training services.
- d. Interviewed R&RS/Library staff to assess MINISIS use.
- e. Installed formal release of MINISIS F.01.
- f. Designed approach to making REPORT table-driven.
- g. Removed DOCTRD from the HP/3000. (987 records)
- h. Removed EVALRD from the HP/3000. (640 records)
- i. Prepared paper describing use of COMPUTE processor.
- j. Provided monthly run documentation to User Services.
- k. Provided monthly run documentation to Quality Control.
- l. Eliminated over 50,000 redundant MFTRAK records.
- m. Archived inactive files in STREAMS and PERMFILE.
- n. Created a database for tracking user training.
- o. Archived THESMAS4 and 4 related CDs to tape.
- p. Created MICRORD and FINMANRD and EGYPTRD databases.
- q. Merged Asia and Neareast databases to form ANE.

C.1.2 SDG Goals and Tasks: FY 1987

This section presents descriptions of tasks proposed for the FY 1987 development and enhancements of AID/DIHF systems. The increased numbers and complexity of SDG tasks in FY 1987 reflect past achievements. Building upon a stable base of automated information resources, we are identifying innovative ways to support the effectiveness of our users.

Schedules that are not complete (TBD) are dependent on FY 1987 budgetary constraints. Five (5) operational tasks considered necessary for SDG services to continue are listed first. The remaining tasks are initiatives believed important for the continued growth of SDG's capacity to meet new and emerging requirements of its users.

C.1.2.1 Task Analysis - System Maintenance and Upgrades

C.1.2.1.1 Requirements Summary.

SDG will maintain MINISIS databases and their related files, reports, and jobs. SDG will maintain established systems (MicroDIS and MenuDIS), COBOL computer programs, IMAGE data bases, and implement software upgrades, as required.

SDG will continue maintaining security software and account control in accordance with the requirements of AID/DIHF. They will conduct scheduled reviews of performance data describing uses of CPU time and other computer resources. They will

identify problems and recommend improved processes. They will recommend equipment and/or software acquisitions, implement changes of system resources and troubleshoot technical problems.

SDG will review computer equipment requirements to identify costs and benefits of equipment upgrade alternatives, and to determine if equipment upgrade(s) scheduled for FY 1987 are warranted.

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 database administration. Processing conventions which benefit all users must be identified, developed, approved, and administered.

To address these opportunities, SDG will recommend policies for consolidating database development where common functions are being served, e.g. file maintenance among the different bureaus. SDG will analyze and review requests for changing database structures and assess their compliance with established AID/DI information processing standards and policies.

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

C.1.2.1.2 Schedule

(a) Ongoing SDG Operations		
- Backup Files		Daily
- Review Resource Utilization Reports		Monthly
- Review HPTREND Performance Reports	Every 4 months	
- MINISIS Index Maintenance		Daily
- Troubleshooting user problems (MINISIS, MicroDIS, MenuDIS, etc.)		As Required
(b) MINISIS F.02 Update		
- F.02 Update		10/18/86
(c) Thesaurus Update		TBD
(d) Computer Equipment Upgrade Analysis		As Required
(e) Computer Software Upgrade Analysis		As Required
(f) Systems Documentation Updates		As Required

C.1.2.2 Task Analysis - Mailing List Database Development

C.1.2.2.1 Summary of Requirements

The SDG staff will continue to provide system analyses and modifications to the AID/DIHF databases (RECIPRD and REQUESTR) for targeting mailing to AID organizational components and missions, as well as other appropriate development communities.

The principal components of this task have been completed, although strategies for implementing large transfers and corrections to ARDA records are being formulated. RECIPRD is operational. Codification conventions are in place which correspond to codes appearing on recipient questionnaires.

C.1.2.2.2 Schedule

This task is performed as needed, when changes to database structures, print formats, or data elements are required.

C.1.2.3 - Automation of Pre-publication Processes

C.1.2.3.1 Summary of Requirements

SDG will continue to develop processes for downloading abstracts and other data from DIS databases to PC-based hardware, and preparing camera-ready copy on the Laser-Jet printer. Automation of the Monthly Acquisition List reports was developed as a first step and other smaller processes were implemented. SDG is now ready to implement similar capabilities for preparing the ARDA.

C.1.2.3.2 Schedule

(a) ARDA	December 1987
(b) All other scheduled ARDAs	Quarterly
(c) Other AID publications	As required

C.1.2.4 Task Analysis - Distributions of COM Indexes

C.1.2.4.1 Summary of Requirements.

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

C.1.2.4.2 Schedule

Months following completion of each quarter.
COM in January - paper indices in April/July/October.

C.1.2.5 Task Analysis - Acquisitions/Project Data Integration

C.1.2.5.1 Summary of Requirements

SDG plans to coordinate opportunities throughout the year which enhance AID/DIHF capabilities to attain its acquisitions goals and improve its integration of project data.

One ongoing activity is the updating of PROJAUTH each year (or more often, if necessary) with data from AID's project and budget databases. A second activity concerns establishing and maintaining a database with information from the AID contract database (COORS) which contained approximately 12,000 contract records early last summer. A review of this database concluded that there are eleven data elements which may serve to support the AID/DIHF acquisition function. The review was postponed until FY 1987 to allow for a scheduled file maintenance of COORS in the summer of 1986.

C.1.2.5.2 Schedule

- | | | |
|-----|--------------------------------------|-----|
| (a) | Update of PROJAUTH | May |
| (b) | Establish AID/DIHF Contract Database | TBD |
| (c) | Maintain Contract Database | TBD |

C.1.2.6 Task Analysis - MenuDIS System Enhancements

C.1.2.6.1 Summary of Requirements

MenuDIS Version 2 is planned to include the following features:

- (a) Provide up to 10 optional browsing print formats.
- (b) Provide up to 20 optional report sorts/print formats, and/or printer designations.
- (c) In DISPLAY, expand field displays to 50 characters.
- (d) Provide for numbering of records displayed on a screen, e.g. 1 of 5, 2 of 5, etc.
- (e) Allow users to key 'MORE' for separate display of all searchable fields, rather than linking display to the end of the search screen's HELP message.
- (f) Add disclaimer line(s) for searches of project data.
- (g) Provide for statistics on the number of times each database was searched each month.
- (h) Modify Message table to accommodate suggestions of IDRC.
- (i) Modify MENU1 to respond to new DDT format of F.02.
- (j) Provide for table-driven tier options (1 to 3) for textual displays.
- (k) Tailor MenuDIS tables (and associated screen displays) to needs of specific user groups, including options on the first screen for:
 - a. Welcome Message
 - b. HELP
 - c. MINISIS
 - d. Order a Document

C.1.2.6.2 Schedule

- | | | |
|-----|--------------------------|-----|
| (a) | Version 2 implementation | TBD |
| (b) | Table changes | TBD |

C.1.2.7 Task Analysis - SDG MICRODIS Enhancements

C.1.2.7.1 Summary of Requirements

A number of MicroDIS enhancements are planned, based on user assessments of operations. Plans include developing additional processing capabilities by establishment of two new databases, a projects database, and a second database which could be used by missions to record documents received from other sources.

C.1.2.7.2 Schedule

- (a) Version 2.1 (Spanish/French) 7/1/87
- (b) Version 3. (Serials ... Online Tutorial) 9/30/87
- (c) Establish a Projects Database 7/1/87
- (d) Establish a database for other sources 9/30/87
- (e) Other enhancements: as required, based on uses.

C.1.2.8 Task Analysis - Online Ordering System

C.1.2.8.1 Summary of Requirements.

The SDG staff is to develop an Online Ordering System in two phases:

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

This system will be a 'stand-alone' system, but accessible from the first menu appearing on Menu DIS.

C.1.2.8.2 Schedule

The schedule for development of this system will be determined after review and approval of its design.

C.1.2.9 Task Analysis - Programmatic Services

C.1.2.9.1 Summary of Requirements

AID now requires that certain program documents be described quantitatively in terms of goals and status. SDG plans to provide database capacities for retaining this information as it is received at the DIHF. Depending on the amounts and complexities of the data we receive, SDG may be required to develop automated analyses of this information.

C.1.2.9.2 Schedule

- (a) Establish a MINISIS database for program documents and measurement characteristics. TDB
- (b) Develop COBOL programs for program analyses. TBO

C.1.2.10 Task Analysis - AID/DIHF Profiles

C.1.2.10.1 Background

This task responds 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. Its goal is to describe in greater detail the environment of each AID mission, thereby improving the ability of AID/CDIE to provide needed services for individual missions.

Profile information can focus on any group of organizations with which AID is working, e.g. libraries, missions, universities and other development-related organizations. In FY 1987, SDG plans to develop a small micro-based database of libraries from which documents are acquired. There will only be a few elements, much like a rolladex file of name/address, contact, telex/telephone, and a brief description of a library's characteristics.

C.1.2.10.2 Schedule

Library Database 9/30/87

C.1.2.11 Task Analysis - MINISIS Network Cooperative

C.1.2.11.1 Summary of Requirements

The AID/DIHF Five-Year Plan has a requirement to facilitate a networking and access to other organizations' MINISIS databases, e.g. IDRC, NTIS, World Bank, and others. Strategies for accessing organizational databases will differ: access may be through dial-up, or through tape exchanges of selected records and data elements. SDG plans to perform technical reviews of exchange agreements and make recommendations; design optimum conversion strategies; and implement technical aspects of each agreement.

C.1.2.11.2 Schedule

To be determined, as AID initiates exchange agreements.

C.1.2.12 Task Analysis - Database Integrations

C.1.2.12.1 Summary of Requirements

The AID/DIHF Five-Year Plan requires integration of DDCRD and CATALOG databases and the integration of BUREAU and PROJRD

databases. This task may include developing, for use by AID library patrons, a new database to quickly search a few elements for the presence or absence of types of documents in DDCRD and CATALOG.

C.1.2.12.2 Schedule

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

C.1.2.13 Task Analysis - HP/IBM Communications Link

C.1.2.13.1 Summary of Requirements

SDG has been asked to establish a communications link with the AID/ICS and the AID/DIHF computer. One of the purposes of this task is to enable users of the AID/DIHF system to route their printed output to missions and other stations on the AID/ICS system. The requirements of this task have been and continue to be subject to external factors, e.g. new technology and AID/IRM coordination. An approach has been designed which implements Remote Job Entry (RJE) communications.

C.1.2.13.2 Schedule

- | | |
|--|-----|
| (a) Install HP Communications Products | TBD |
| (RJE - HP 30248A and BSC Software) | |
| (1) Staff orientation - 13 new commands | |
| (2) Full systems backup ... job testing | |
| (b) Develop Implementation Requirements | TBD |
| (1) COBOL program to read/route spooled output | |
| (2) IRM coordination for protocols and JCL | |
| (c) Implementation | TBD |
| (1) Develop optimum schedule of operations | |
| (2) Documentation and training | |

C.1.2.14 Task Analysis - Identify PC Software Enhancements

C.1.2.14.1 Summary of Requirements

SDG conducts ongoing reviews of personal computer software to facilitate communications with other AID automated processes, and to download DIHF minicomputer functions whenever feasible. In the past year a number of initiatives were implemented in this regard - automated flows of data originating on WANG and IBM equipment were established to and from the DIHF/HP minicomputer. Downloading of abstracting and publishing functions was accomplished.

SDG plans to continue its review of opportunities for enhancing our personal computer software capabilities. As these opportunities are identified, their costs and benefits will be analyzed to determine their applicability to our environment.

C.1.2.14.2 Schedule

To be determined, as opportunities are identified.

C.1.2.15 Task Analysis - Automated Library System

C.1.2.15.1 Summary of Requirements

The SDG staff is to develop an Automated Library System for use at the AID library. The library requirements will be coordinated with a Task Group established to oversee the development of the system.

The design of the Automated Library System will be coordinated with the development of the Online Ordering System and the automated serials services functioning in the library. 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.1.2.15.2 Schedule

The schedule for performing this task will be developed with the coordination of a Library Automation Task Force.

C.1.2.16 Task Analysis - OCLC Conversion

C.1.2.16.1 Summary of Requirements

The AID/DIHF Five-Year Plan requires converting approximately 2,000 AID bibliographic records presently on the Online Computer Library Center (OCLC) system located in Dublin, Ohio, and entering the records to the AID/DIHF CATALOG database in the MINISIS format. Prior to initiating the task, SDG will work with the MINISIS staff at the International Monetary Fund to review their applicable procedures.

C.1.2.16.2 Schedule

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

C.1.2.17 Task Analysis - Update MISSONRD Database

C.1.2.17.1 Summary of Requirements

In FY 1986, a MINISIS database structure was developed for storing collections of mission documents. Information is planned to be transferred to this database from MicroDIS diskettes as they are received from the missions. SDG developed automated interfaces among MicroDIS, DBase III, and HP/MINISIS formats for this purpose.

C.1.2.17.2 Schedule

To be determined, as data is received.

C.1.2.18 Task Analysis - Establish a Multi-Bureau Database

C.1.2.18.1 Summary of Requirements

This requirement involves modifying the Africa Bureau database (AFPRJRD) and its associated files to function as multi-bureau database. Presently, this database serves to tailor the distributions of fiche - one copy to a central file, one copy to the responsible project officer, and one or more copies for each related sector of interest.

Unlike other bureaus, this database contains a repeating group of sector interests describing each project. Plans include adding project officer names (estimated at 20-30 for Africa and fewer for the other bureaus), project locations, and project specific distribution requirements.

C.1.2.18.2 Schedule

TBD

C.1.2.19 Task Analysis - Database Administration

C.1.2.19.1 Summary of Requirements

Database administration is an ongoing SDG function; however, certain activities can be identified and performed as time permits. These include implementing efficiencies in user-developed processes; identifying optimum standards for performing database queries and reporting; and coordinating with training to ensure adequate awareness and appropriate use of our information capacities.

C.1.2.19.2 Schedule

As time permits

C.1.2.20 Task Analysis - Technology Assessments

C.1.2.20.1 Summary of Requirements

SDG conducts ongoing reviews of emerging technologies which promise to improve our technical processes to the benefit of present and future users of our data. Presently, for example, SDG is monitoring and assessing developments in the areas of optical disk technology, and we are testing the benefits of electronic mail software.

C.1.2.20.2 Schedule

Ongoing, as required.

C.2 Acquisitions

The function of the Acquisitions Unit is to collect AID and non-AID documents from within and outside the Agency. All materials must first be screened to eliminate peripheral and duplicate documentation, then routed to the DIHF for subsequent processing. The success of this activity is critical to the overall functioning of the facility. The number of materials supplied from the Acquisitions Unit is vital for upholding the credibility and utility of the Development Information System (DIS). It has a direct impact on DIHF cataloguing, filming, and abstracting/indexing and the DIHF's overall ability to achieve its contract objectives.

It is also vital for upholding the credibility and utility of the DIS. Demand for DIS will increase only if it is proven that it provides the most current and comprehensive listing of materials available.

The DIHF has had the responsibility for acquiring non-AID materials since the beginning of the contract. It assumed responsibility for collecting AID materials in June 1985.

C.2.1 FY86 Accomplishments

C.2.1.1 AID Documentation

At the end of FY 1985, CDIE/DI had no standard procedures for acquiring AID documents -- only informal arrangements with AID offices. The AID print shop was not supplying needed documents. In addition, there was no manual available describing how to secure documents or contact possible document sources.

The DIHF Statement of Work did not address this problem, nor did it outline numerical year-end objectives for the Acquisitions Unit. There were general guidelines concerning the kinds of materials which A.I.D. wanted on DIS. The goals for acquisitions for FY 1986 became twofold: to process a sufficient number of documents to allow the DIHF cataloguing staff to satisfy their AID goals; and to establish and document a network for acquiring documents that would encompass the entire Agency.

In February 1986, the Acquisition Unit was reorganized to facilitate the collection of three types of documentation during the FY 1986 period -- technical, design, and evaluative materials. As a first step in acquiring these materials, the Acquisitions Unit targetted the following AID bureaus: the Science & Technology Bureau (S&T), because of their access to technical reports; other AID/W bureaus, for evaluative and design materials; and AID missions, for documentation unavailable through AID/W.

S&T was divided into its nine technical offices and the contractors they represent. Contractors outside of S&T authority who also publish technical reports were separate. AID/W was delineated into seven bureaus and each bureau was segregated into evaluation sources and document design sources.

AID missions were one unit. They were to be approached in two ways: individually, through presentations to all mission personnel visiting Washington on TDYs; and collectively, through cables.

The next step was to determine the location of the documentation centers within this framework. Once these centers were identified, Acquisition Unit presentations could be given and CDIE/DI promotional efforts would be initiated. To assist in this effort, an acquisition orientation package was produced for distribution.

To date, contacts with seven S&T technical offices have been established through briefings and reviews of document printouts for the receipt of technical materials. (Contacts with S&T/Program Office provide program level documents; CDSS', ABS' and Action Plans). In addition, contacts have been made with representatives of thirteen major AID contractors outside of S&T. These meetings were held in response to Agency document requests. To summarize the AID/W effort, channels have been established with six bureaus for both project design and evaluative materials.

In the AID mission effort, eight orientation sessions have been given. In addition, a cable was sent in April to 32 missions which described acquisitions and requested missing design reports. This activity yielded design documentation for 112 projects. Exhibit C.2-1 and C.2-2 show the progress that the Acquisitions Unit made this year -- Exhibit C.2-1 provides an overview, Exhibit C.2-2 provides a detailed break down.

To assist in this networking effort, several procedures were implemented. The Acquisitions Unit closely monitors the Agency records management filming activity currently underway for M/SER/MO/PA/RM. Bureau project files in Latin America, Asia/Near East, and Africa are now all accessible for database searching and each month they are reviewed for materials not listed in the DOCUMENT database. A field was also added to the geobureau databases to identify records which had previously been checked and rejected for inclusion into DOCUMENT. This will eliminate reviewing records twice. A similar field was appended to the PROJECTS database for projects where descriptive documentation was found to be unavailable.

To improve the ability to provide useful printouts to Agency contacts, three databases were created which combine the PROJECTS database with each of the geobureau databases. This allows a printout of project numbers to be combined with a listing of related bureau documents. These printouts enable AID personnel to point out important bureau materials which may have been by-passed by the DIHF because they did not satisfy DIHF processing criteria. To help monitor this entire operation, a LOTUS 1-2-3 database system was developed to help the Acquisitions Unit record and track their networking progress.

Exhibit C.2-3 shows the number of documents that were acquired this fiscal year. In total, 9,758 materials were processed (812 a month). Of that amount, 4,551 were screened out as duplicate

or miscellaneous. Thus 54 percent of the materials received could not be used. Of the materials sent to the DIHF for cataloguing, 2,432 were project documents and 2,139 were technical reports. The ANE Bureau provided the highest level of documentation. The S&T Bureau was next, though considerably behind ANE. The AFR and LAC Bureaus contributed about the same levels of materials, which amounted to about half of the S&T output.

In addition to acquiring materials, the Acquisitions Unit performs two other major roles -- outreach and document fact-finding. The outreach function is an integral part of acquisitions. On many occasions AID staff and contractors are unaware of CDIE/DI and the functions that it performs. The Acquisitions Unit therefore makes the introductions and/or sets up follow-up meetings with the appropriate CDIE/DI representative. It is important from an acquisitions standpoint to demonstrate what CDIE/DI can do for its users so that an exchange of documents can be arranged. Once working relationships are established, the Acquisitions Unit will often become the liaison between CDIE/DI and these contributors.

Document fact-finding is the result of the continued effort of the Acquisitions Unit to expand its coverage. As more offices are approached, new document-types and new definitions for old document-types are discovered -- e.g., what constitutes a design for each bureau. Exhibit C.2-4 summarizes the results of this inquiry. This information must be subsequently presented to the DIHF and AID to determine if new processing policies should be enacted.

C.2.1.2 Non-AID Documentation

The procurement of commercial materials, serials, and other non-AID publications is performed at the DIHF. Materials are ordered upon written approval from the AID librarian. After materials are received, a check-in procedure is followed to provide the necessary paper work for the accounting division. Once checked-in, materials are routed for full cataloguing into the CATRD database. The exceptions are documents intended for inter-library loans to AID missions and the Office of Population of S&T.

The Statement of Work does not provide year-end goals for the receipt of non-AID materials, but it does give a listing of document types to be acquired. All of these were ordered during FY 1986. A total of 248 monographs were ordered and 188 serial titles were either renewed or ordered. In the course of improving performance, five additional tasks were also undertaken. They are discussed below.

The first effort facilitated the library check-in procedure for serials. It was undertaken at the request of the Serials Librarian. A computer-generated listing was created to display materials according to their frequency of publication (i.e., monthly, quarterly, weekly). This effort required the development of a new print-format and several special queries.

The second task was initiated at the behest of the AID library to expedite filling mission requests. Procedures were established to procure mission-requested documents rapidly from local publishers (Washington, D.C. area). These documents, acquired through the joint efforts of both the DIHF and the AID library staffs are sent to the requesting mission on an inter-library loan basis. The mission then returns it to the library which, upon receipt, returns it to the DIHF for complete cataloguing.

A third activity, also in response to the AID library, was the creation of a printout to list recently-acquired serials in both single-spaced and double-spaced format. These printouts are used during monthly update operations.

Fourth, a purchase order form was developed to expedite the process of ordering materials directly from publishers.

Fifth, procedures were implemented to send monthly printouts of both current and standing orders to the AID direct-hire librarian. This has assisted the AID library in its acquisition approval function. This task was an outgrowth of a similar procedure developed last year for updating serials.

Finally, efforts to procure commercial publications, including the ordering of new and the renewal of previously ordered serials, for the Office of Population of S&T were initiated during FY 1986. These publications, once acquired, are sent directly to the requestor or distributed via specified mailing lists by the User Services division of DIHF.

C.2.2 FY 1987 Goals and Objectives

C.2.2.1 AID Documentation

During the 1987 fiscal year, the Acquisitions Unit will work towards achieving two goals: to maintain the integrity of DIS by acquiring substantive materials and to provide DIHF cataloguing with sufficient material to allow them to satisfy their requirements. Several tasks will be implemented to fulfill these goals.

1. The channels of communication that were set up during FY 1986 will be maintained. Schedules will be followed so that all offices and bureaus will be contacted at regular intervals. At the same time, we will try to not over-burden our sources. Bureau design printouts will be sent once every 6 months. Evaluation checks will also be sent every 6 months, unless a bureau evaluation summary is forwarded earlier. These efforts will be staggered throughout the year to enable the Acquisitions Unit to do a thorough review of each printout. The S&T Bureau document printouts will be sent once a year. They will only update what has been added to the system in the interim, unless otherwise requested. It will also be important to introduce new AID personnel to the acquisition operation.

2. FVA/PPE and OFDA will be added to the network in an effort to access evaluative reports. The remaining two S&T offices, S&T/RD and S&T/IT, will be approached for technical materials.

3. As the geobureau filming effort progresses into other bureaus, cross-checking techniques will be set up to capture documents not on DIS.

4. We will design and implement a systematic approach to collect technical documentation produced through the AID bureaus other than S&T. Future meetings with the AID Contracts Office are scheduled to discuss this issue. The COORS database will be used to identify AID project managers who are responsible for this material on a project and country basis. Once the target group has been identified, methods will be developed to help the Acquisitions Unit contact these individuals. In addition, the Agency may change contract language to require contactors to produce and send their reports to CDIE/DI.

5. An effort to secure program-level documentation will be emphasized. How this activity is handled will be contingent upon how the Agency decides to process this information. Current AID policy suggests that ABS', CDSS' and action plans will be program materials that the Agency wants to document. The first two are already accessible on DIS and are acquired regularly from AID. They can be displayed by country but cannot easily be aggregated from a program perspective. The Agency debate on whether to include Action Plans on DIS is not yet resolved. In addition there is discussion on what other types of materials constitute program documentation. Once the Agency resolves these issues, the Acquisitions Unit will move ahead to capture these materials.

6. A backlog of 23 boxes of problem documents exists at the DIHF Annex which will be processed as time allows. Also eight boxes of materials sent by AID offices need to be checked against DIS.

7. As the MicroDIS effort continues to gain acceptance in AID missions, access to mission collections should become greater. As more collections are stored and exchanged on computer disks, the Acquisitions Unit may be able to obtain copies of mission collections to check against DIS. Ideally, a printout could then be sent to USAID's which highlights those items within their collections that DIS does not have. Since many issues are involved in such an activity, a pilot exchange should be initiated first with one mission. If the effort proves successful, additional missions could then be tried.

8. An Acquisitions Manual will be refined and continually revised as further progress is made at networking the documentation needs of the Agency.

C.2.2.2 Non-AID Documentation

All non-AID acquisition services during FY 1987 will be oriented, as usual, toward the continual achievement of a close interaction between AID and DIHF. Our acquisition goals remain the prompt procurement of all commercial materials, serials and other non-AID publications as well as any special services required, i.e., printformats, special queries, and printouts for both the AID library and the Office of Population. Also, two additional tasks for FY 1987 will be implemented.

The first effort will focus on the procurement of the following two documents singled out for purchase by the AID direct-hire librarian for FY 1987: National Development Plans at an estimated cost of \$15,000, and Index to International Statistics at an estimated cost of \$9,000.

A second activity will be the addition of non-AID acquisitions procedures to the Acquisitions Manual described above.

C.3 Processing

This section deals with the processing of documents which includes:

- . Cataloguing onto the DIS and using AACRII rules for AID-reports or commercial publications
- . Abstracting and Indexing
- . Thesaurus and Institutional Authority file maintenance

C.3.1 Cataloguing

The Cataloguing Unit for most of FY 1986 consisted of a staff of six persons -- three full-time and three part-time (30-32 hours per week). One person supervises the Cataloguing Unit and is responsible for the proofing/quality control of the DOCUMENT and CATALOGUE databases; one person catalogues non-AID commercial documents; one person maintains the SERIALS database, and is responsible for non-AID acquisitions; one person maintains INSTDS and along with the other two remaining staff members devotes his time to cataloguing, quality control, and clean-up of AID documents and records.

Cataloguing of AID materials is divided between the DOCUMENT database (AID-supported documents produced since 1980 and AID documents produced since 1978 both of which are fully catalogued and microfiched) and INVRD or Inventory database (which contains older, lower-priority AID documentation). DOCUMENT records are created from a possible total of 102 fields, entered according to AACRII cataloguing rules. A minimum of 10 fields are required.

The duties of the AID document cataloguers are not limited to entering records. Ancillary activities include sorting and analyzing documents, discarding duplicates, and routing documents to filming, abstracting/indexing, and storage. Routing of catalogued documents requires an average of 3 person-days per month. Analyzing documents for inclusion in the NTIS bulletin and preparing them for shipment to NTIS takes 8-12 hours per ARDA issue. Searching the geobureau databases for needed documentation is also a function of the AID document cataloguers.

C.3.1.1 FY 1986 Accomplishments

C.3.1.1.1 AID Document Cataloguing

From October 1, 1985 through September 30, 1986, the total number of hours spent processing was 9853.5. This was 176 fewer hours of processing than in FY 1985 and yet total processing into DDCRD and INVRD increased by 14 percent in FY 1986.

In FY 1986, the Cataloguing Unit processed a total of 5,107 AID documents: 2,755 project documents and 2,352 technical documents. The Scope of Work requires 2,500 project documents (PDs) and 2,500 technical documents (PNs) to be processed each year of the contract. This fiscal year, 255 more project documents were processed than required. The increase in PD

processing was primarily due to the efforts of the Acquisitions Unit to augment project information as well as from geobureau searching. There were 148 less PNs processed than required. This represents a 2 percent deficit and was caused mainly by the lack of availability of CGIAR documents for most of the fiscal year.

This fiscal year our queue total of backlog documents had a high of 14,956 and a low of 8,297. A total of 6,659 documents were pulled from the warehouse but because 55 percent were duplicates, non-AID, or miscellaneous the sorting of these documents gleaned only 2,984 documents for INVRD. This was 1,516 documents below the INVRD goal.

During FY 1986, processing guidelines were changed for ABS and CDSS bibtypes. Previously, they were fully processed only if they had been published at least 2 years earlier. Very little had, in fact, been processed. Since the AID library made both of these readily available to their clientele it was decided to process them as soon as they were received. In addition, the Acquisitions Unit sent their 2-year store of acquired ABS' and CDSS' for processing. A total of 509 ABS and 237 CDSS documents were added in FY 1986. This represents an increase of 1900 percent for ABS' and 540 percent for CDSS' from the total of what was previously on DOCUMENT.

At the beginning of the fiscal year the Cataloguing Unit acquired the Evaluation Library collection which consisted of 42 boxes of documents. These were sorted and processed over a 5 month period. They gleaned not only documents for DOCUMENT and INVENTORY but also non-AID material which was sent for CDIE/DI review to be considered for inclusion in the AID library collection.

In May, the DIHF was asked to process onto MicroDIS the classified documents housed in fourteen cabinets on the second floor of SA-18 in Rosslyn. An HP Vectra was installed (and later replaced by an IBM PC) in Room 206, SA-18 along with the cabinets. In June, after the cataloguing guidelines for MicroDIS were completed, the cataloguing and indexing of the classified documents began. Work on the project averaged 48 hours per week between two cataloguers. By the end of the fiscal year, the processing of five cabinets was completed. A total of 1,209 documents were entered into MicroDIS.

The processing of PIDs changed in order to make current PIDs more accessible to the research staff and to improve coverage of project information. PIDs for which no approved design document existed on the DIS were used to write a project overview for PROJECTS. Those over a year old were placed in Paper Copy Library and those under a year old were placed in the Annex to the Paper Copy Library (for quick retrieval.) PIDs of any date for which an approved design document existed on the DIS had a record placed in INVENTORY and were shipped to the warehouse.

The bibtype, 'AID Supported Study', was assigned to all 10,000 records from the RRAND database when it was added to DOCRD. Since that time it has been an overused and very general bibtype.

Consequently, there were more than 14,500 records with the bibtype 62. In July, the bibtypes were revised and more specific ones created that replaced, at least in part, some of these generally assigned bibtypes. More than 500 records have had their bibtypes changed from "AID Supported Study" to more specific ones.

A total of 6 weeks in August and September were spent on the "50 Boxes Project" as a result of the AID library's inventory in January during which no shelf list cards were found for an accumulation of 50 boxes of documents. These documents were pulled from the shelf at that time and stored until July when money was allocated to the DIHF for rectifying this situation. In August, abstractors, cataloguers, and acquisition staff worked on the project. In September, the cataloguing and acquisitions staff worked together to search for main entry cards and create shelf list cards. The Cataloguing Unit alone worked 288 hours in the library on this project during August and September.

C.3.1.1.2 Non-AID Document Cataloging

During FY 1986, 654 non-AID commercial documents were catalogued and processed into the CATALOG database. Of this total, 226 documents were orders, 222 were gifts, 92 were retrospective reference and 131 were backlog gift items. In addition, 101 call numbers were assigned to AID-sponsored documents and thus were added to DDCRD database. Processing into CATALOG increased by 23 percent over FY 1985.

In June and July of this fiscal year, a formal Bibtype Committee met to discuss and revise bibtypes. A major effort was made to consider more non-AID bibtypes primarily for AID mission use. As a result of these meetings, a number of changes were recommended and ultimately approved. Little used or unused bibtypes were deleted such as Quick Response, Tailored Response, Simple Response, Title XII Project Document, Economic Analysis Abstracts, Task Force Report, Working Paper, and Knowledgeable Individual/Groups. Bibtypes were added for Concept Paper, Program Assistance Initial Proposal (PAIP), Case Studies, Handbook/Manual, and Non-AID Program/Project Design Document. Several changes were made: AID Discussion Paper was changed to Discussion Paper; Research Study was reactivated to Non-AID Research Study; the bibtype Annual Report was changed to Annual Report/Yearbook (and Yearbook was deleted).

Also in June, due to lack of space in the AID library it was decided not to process the 135 boxes of backlog non-AID documents in storage at the DIHF. All of these documents were considered dated material since they were all published prior to 1982. They were donated to a non-profit resource center.

C.3.1.2 Goals for FY 1987

C.3.1.2.1 AID Document Processing

AID document cataloguing targets are again set at 5,000 records for DOCUMENT (2,500 PD's and 2,500 PN's) and 4,500 records for INVRD. Every effort will be made to meet these goals. Although

the total amount of AID document processing increased by 14 percent with 176 fewer hours spent on processing than in FY 1985, we will need at least the same level of staffing as in FY 1986 for the coming fiscal year to achieve the goal for PNs and PDs and to approach the INVRD goal. In order to meet the goal for INVRD we will need a full-time library technician added to the processing staff. The library technician would work solely on sorting backlog documents and entering non-duplicates onto INVRD. Only then will we be able to increase the amount of time spent processing backlog documents and thereby increase the number of documents processed into INVRD.

A major goal for FY 1987 is to complete the Classified Document Project in Rosslyn. There are nine remaining cabinets to be processed. Each group of documents, e.g. the Ohly Reports and the Marshall Plan documents, will be judged independently to determine whether they shall be indexed and, if so, to what extent, i.e., minimal or full indexing.

As a second goal for the upcoming year, we recommend adding the 118 boxes of second copies from the AID library to our queue and processing them. These boxes consist of AID produced and AID-sponsored documents and will provide numerous documents for INVRD.

An additional goal is to resolve the remaining B-number records. These records include a significant number of records for non-priority bibtypes: 304 end-of-tour reports, 25 Congressional Presentations, 23 bibliographies, 88 undifferentiated reports, and 15 miscellaneous design documents -- totalling 455. In addition, there are 599 B-number records with call numbers. We recommend seeking AID's approval to obtain these documents from the AID library. This activity was also a goal for FY 1986 but time and priorities precluded work on it. In FY 1987, resolving the B-number problem will be done as time and priorities allow.

C.3.1.2.2 CATALOGUE Database (non-AID Documents)

The goal for FY 1987 is again set for processing 500 commercial and non-AID documents for inclusion in the AID library. However, processing is expected to exceed this target by at least 100. This is expected to come from orders, gifts, and a few backlog gifts. An increase in ordering is expected in FY 1987 as a major effort on the part of the AID library to augment their collection with current material. These shall be processed promptly upon receipt.

Again, the possibility exists that the conversion of the AID library card catalogue will be approved and funded for FY 1987. It is our intention to provide support for this activity. However, adequate resources are not available at this time. Our procedures and guidelines would need to be revised to reflect a change in priorities.

C.3.2 Abstracting/Indexing

C.3.2.1 FY 1986 Accomplishments

C.3.2.1.1 Quantitative Accomplishments As Measured Against Targets

Targets were to:

(1) Prepare 1,500 DIHF-generated abstracts, including 300 projects (200 dated from 1984 onward, 100 dated prior to 1984) and 1,200 evaluative and technical documents (the latter to include 100 technical documents for a farming systems research bibliography - FSRB).

(2) Edit 200 AID-supplied abstracts.

(3) Index only a combined total of 4,300 project and technical documents.

Overall, accomplishments exceeded targets. A total of 1,549 DIHF-generated abstracts were prepared. This included: 299 new projects (190 from documents dated from 1984, 109 from documents dated prior to 1984), 100 project amendments, and 982 evaluative (536) and technical (446) documents, the latter including the targeted 100 abstracts for the FSRB. While the combined total of evaluative and technical abstracts was thus 218 below target, this shortfall was compensated by the editing of 344 AID-supplied abstracts, 75 percent over the target number; of these, 143 were Congressional Presentation abstracts added to the PROJECTS database only.

The target number of documents to be indexed only was also surpassed. It should be noted, however, that the monthly statistics for indexing only were artificially inflated due to two factors:

(1) Confusion during data entry (for the months of March, April, and May) of DDCRD Field 690 (Date indexed only) data with reindexing data;

(2) Failure to take into account in computing Field 690 the lag in mean time between documents abstracted and documents indexed only.

An end-of-year search to correct these errors found that a total of 4,400 project and technical documents had been indexed only - less than originally reported, but still in excess of target. Future monthly reports will remedy these problems by subtracting from the monthly total in Field D690 (Date indexed only) the monthly total in Field D700 (Date processing completed) as well as the monthly total in Field D680 (Date abstracted).

It should also be noted that the carry-over of a backlog of documents from the previous fiscal year made available for abstracting and indexing a total number of documents in excess of the 5,107 processed by the Cataloguing Unit during FY 1986.

FY 1986 production levels were accomplished despite reductions in Abstracting/Indexing (A/I) staff and other interruptions (see C.3.2.2 below).

C.3.2.1.2 Other FY 1986 Accomplishments

1. Improvements in internal procedures

- a. Procedures were developed to clarify the processing of ARDA and special bibliography abstracts, NE Bureau abstracts, audit reports which provide only financial information, and PES/ES facesheets which lack project information.
- b. In line with a contract requirement, procedures were developed to increase the use of AID-supplied abstracts by relying on executive summaries of evaluation and technical documents.

2. Improved coordination

Meetings were held and procedures developed to clarify, increase, and improve the A/I staff's functional relations with the RSSA research staff and with the DIHF's Cataloguing and Acquisitions Units.

3. Reduced document processing mean time

Abstracting and indexing mean times decreased to their lowest levels since the beginning of the DIHF contract in 1981. In regard to abstracting, mean time decreased to 68 days in July, just short of the 60 days projected in last year's report, although the figure rose after that due in part to reasons noted in C.3.2.2 below. Indexing mean time fared even better, declining to 17 days in May and not rising above 24 thereafter, against a target of 30.

4. Participation in task forces

- a. At the request of the Contract Monitor, A/I staff worked with Chris Wolter of CDIE/DI and DIHF Cataloguing Unit staff to discuss problems with bibtypes, especially the apparently excessive number of Bibtype 62's on the DIS, and helped form specific recommendations for revising the DIHF Bibliographic Code List. In support of this effort, several hundred document records were analyzed and almost 500 former 62's were changed to other bibtypes.
- b. Also at the request of the Contract Monitor, the A/I Supervisor and the Cataloguing Supervisor jointly prepared and submitted to the Contract Monitor recommendations and detailed guidelines for processing PID's and draft documents.

C.3.2.2. Problem Areas

1. The projected condensation of the DIHF Abstracting Guidelines into a short manual for use by AID offices in preparing

author abstracts for submission along with documents failed to materialize fully. On the positive side, the Guidelines were updated in accordance with recent procedural changes and an information package was developed for the Auditor General's office explaining and giving examples of a simple method of preparing author abstracts for inclusion in audit reports.

2. There was a reduction in A/I staff caused by funding shortfalls, resulting in the loss of two part-time abstractors and the failure to replace a full-time Abstractor/Assistant Editor who resigned. Other problems included the loss of 8 days in abstracting time to the "50 Boxes Project" and the burden placed on the A/I staff by the noise and other disruption caused by the lengthy renovation of the DIHF building in Chevy Chase.
3. During FY 1986, there was diminished document flow. After increasing to 1,430 and 1,436 in the second and third quarters, respectively, the number of documents catalogued (and so available for abstracting and indexing) fell to 1,062 during the final quarter. The steady decline in monthly totals (400, 351, and 311 for July, August, and September, respectively) during this period makes the decrease ominous. Repeated questioning of Acquisitions and Cataloguing staff indicates that the document flow will not increase noticeably.

C.3.3 FY 1987 Goals and Objectives

C.3.3.1 The Difficulty Caused by Staff Reductions in Meeting Contract Targets and Possible New Targets

According to the contract, quantitative A/I targets for FY 1987 are the same as those for FY 1986, except for an increase from 200 to 300 in the number of AID-supplied abstracts to be edited. It seems clear, however, that the two main problems noted above - staff reductions due to funding cuts and diminished document flow - will make these goals difficult, if not impossible, to achieve.

To meet contract goals, the A/I staff will be required to add to the DIS, on a monthly average, 150 abstracts (125 DIHF-generated and 25 editings of AID-supplied abstracts), as well as 358 documents indexed only. This will require a monthly average of at least, if not more than, the Cataloguing target of 416 documents - well above the 356 averaged during the fourth quarter of FY 1986 - a problem compounded by the reductions in A/I staff caused by the FY 1986 funding cuts. Finally, there is a growing possibility that in FY 1987 A.I.D. will require the DIHF to process program-level materials.

C.3.3.2 Projected FY 1987 Staffing Levels and Targets

Currently, the A/I Unit has the equivalent of 4 1/2 staff members (3 full-time and 3 part-time employees). Projected staff allocation by function during FY 1987 is as follows:

- | | |
|-----------------|--------|
| a. Abstracting: | 2 1/4* |
| b. Indexing: | 1/2 |
| c. Editing: | 7/8 |

d. Document Processing:	3/8
e. Transmitting:	1/4
f. Supervising:	1/4
TOTAL	4 1/2

* down from 3 1/2 for FY 1986.

Abstracting

At these staffing levels, we estimate that the A/I Unit can produce a combined total of about 1,300 DIHF-generated and AID-supplied abstracts, some 500 short of the overall target. We believe that we could largely, if not perhaps totally, overcome this shortfall if AID:

- (a) adds a part-time abstractor to the A/I staff; and
- (b) adopts the proposals recently forwarded to the Contract Monitor for reducing abstracting time.

Key elements of these proposals are to base the abstracts of design documents on the Summary rather than the Detailed Description and, except for CDIE impact evaluations, to cease abstracting special evaluations not attached to a PES/ES. It should be made clear, however, that merely adopting the above-noted proposals, without increasing the A/I staff, would reduce, but in no way eliminate, the projected shortfall in abstract production, although it would probably eliminate the recurring document backlog and thereby allow the A/I staff to attain the contract target for abstracting mean time (the figure for which rose, as noted above, after the mid-FY 1986 staff reduction).

To meet FY 1987 abstracting targets and also process program-level documentation if required, it would be necessary to adopt the above proposals and add a full-time abstractor to the staff. The alternative would be to revise the target for abstracting downward.

In discussing additions to the A/I staff, we propose:

- (1) increasing from 1/2 time to 3/4 time a present staff member; and/or
- (2) reactivating one or both of the part-time (15 hours a week) abstractors who were retired last June as a result of the budget cuts.

Whether or not either or both of these individuals, both of whom have high production levels, would in fact, return if invited is not certain, although the chances seem good in at least one case.

Indexing

The FY 1987 projection for documents to be indexed only depends on the number of documents received. Due to the reduced document flow noted above, one of two part-time indexers has been temporarily retired. Adding to the work of the one remaining

indexer the indexing done from time to time by other staff members, we project that 3,000-3,600 documents will be indexed only during FY 1987, between 700 and 1,300 short of target.* This shortfall can be overcome, however, by an increase in document flow. If document flow were increased, we would reactivate the second part-time indexer, who, as an independent contractor (for CSG), is willing to provide as many hours as necessary.

* There is an unresolved discrepancy in the A/I targets as stated in the Statement of Work: on one hand, the total number of documents to be catalogued annually throughout each of the 5 years of the contract is 5,000 [2,500 PD's and 2,500 PN's]; on the other hand, the total number of items to be indexed only for each of the 5 years is 4,300. To this latter figure must be added 1,500 DIHF-generated abstracts for each of the 5 years, plus, incrementally, from 100 to 500 editings of AID-supplied abstracts, for annual totals of 1,600, 1,700, 1,800, 1,900, and 2,000 abstracts. Thus, by the final contract year, the A/I staff will be required to produce a combined total of 6,300 items - while still receiving only 5,000 documents. The use of Congressional Presentations to prepare abstracts for PROJECTS clearly cannot compensate for this discrepancy. As already noted, the existence of a backlog of documents allowed us to produce in FY 1986 a total number of items greater than the total delivered to us by the Cataloguing Unit. The emerging trend in document flow indicates that such backlogs are a thing of the past.

C.3.3 Thesaurus Maintenance

Regular Thesaurus maintenance operations continued during FY 1986. Highlights of activities during the year include: two Thesaurus Review Committee meetings; action on management terms; enhancements to the alphabetical display; and distribution of update pages.

C.3.3.1 FY 1986 Accomplishments

C.3.3.1.1 Thesaurus Maintenance

The Thesaurus Review Committee met twice (November, 1985 and April, 1986) and reviewed a total of 75 suggested Thesaurus changes. In addition, the DIHF and DI Thesaurus Coordinators met in October 1985 and April 1986 and reviewed a total of 163 suggested changes from USAID/Cairo. As a result of these reviews, 58 terms were added to the Thesaurus, 36 were deleted or replaced, 5 scope notes were added or revised, and 7 forbidden terms were added. In two instances, approved changes necessitated major reorganizations of portions of the Thesaurus hierarchy.

When the Committee chose not to approve a new descriptor, it took one of two actions, either

(a) indicating existing terms (or combinations thereof) that should be used instead, or

(b) indicating that the descriptor could be placed in the identifier field where its use would be tracked.

Fourteen such suggestions are currently being tracked.

As an immediate response to information received concerning PPC/CDIE's FY 1986 evaluation emphases, the term "Project sustainability" was added in December 1985.

PPC/PDPR conducted a Thesaurus review during the summer of 1986 and suggested several new descriptors; these suggestions were reviewed at the Fall 1986 meeting.

In all, 144 suggestions for Thesaurus changes were received during FY 1986. Most of these suggestions came from persons using the Thesaurus for indexing, rather than database searching.

C.3.3.1.2 Reindexing

Following each Committee meeting, document and project descriptors were examined through global search strategies and appropriate reindexing was performed. Several hundred records were partially or wholly reindexed during FY 1986.

Further, the indexing of 225 OPG and DPG design documents was reviewed to ensure that an appropriate descriptor indicating a PVO project was present; where lacking (in about 50 percent of

the records), the descriptor was added in both DDCRD and PROJRD databases.

C.3.3.1.3 Thesaurus Enhancements

At the request of research staff, a new field - DATEAD - was added to the WORDS database to provide a record of the dates on which specific descriptors were added to the Thesaurus. This field was added to all descriptors approved during FY 1986. The print format for the alphabetical Thesaurus display was modified so that date-added information will be available in future updates and hardcopy editions.

C.3.3.1.4 Management Terms

The management terms issue was addressed by the Committee in its 4/86 meeting; an updated list of 12 management terms suggested by research and reference staff was reviewed. The Committee decided that whenever possible these terms should be added as Thesaurus descriptors, rather than as management identifiers. Thus, eight of the suggestions were added as descriptors, and three as management identifiers.

C.3.3.1.5 Identifiers

As a result of the Committee's action on management terms and its decision to do some long-term tracking of proposed descriptors, the Identifier field is being increasingly used as a tool for database searching. Further, the variety of IDENT postings has increased drastically because one of the new management identifiers is a generic quantity - the names of specific implementing organizations. In response to these changes, maintenance of the IDENT fields in PROJRD and DDCRD has been stepped up. Postings are reviewed monthly to ensure that the names of PVO's and other implementing bodies are entered in a consistent manner.

C.3.3.1.6 Publications and Information Dissemination

Due to AID funding reductions, the Thesaurus was not republished in toto in FY 1986. Instead, update alphabetical display pages (including all terms added, deleted, or modified) were prepared and distributed. These pages included the date added for all new terms, and in the case of deleted terms, indicated which terms should be used instead.

Several other information dissemination activities were also conducted. After each Committee meeting, a memo outlining in detail all actions taken by the Committee was distributed to indexers, researchers, reference staff, and other Thesaurus users. Lists of identifier postings were distributed to research and reference staff. Periodic memos were addressed specifically to indexers, e.g., a memo highlighting PPC/CDIE 1986 evaluation emphases, and dissemination of an AID cable outlining the Agency's child survival activities.

Requests for Thesauri were received frequently over the year. Those from AID personnel and from others approved for free

distribution were filled promptly. In all other cases, a letter supplying ordering and cost information was sent.

C.3.3.2 FY 1987 Plans

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

C.3.3.2.1 Thesaurus Maintenance

Meetings of the Thesaurus Review Committee will be held as often as necessary to permit timely review of suggested changes. The first meeting has been scheduled for October 1987.

In addition, since the Thesaurus has now been in use for two full years, a postings review will be undertaken during the first half of FY 1987. Focusing on terms with none or very few postings, such a review should help to identify:

(a) terms which are too specific for the development information being processed at the DIHF, and

(b) terms which are pertinent to development literature, but are possibly being overlooked by indexers.

An attempt will also be made to evaluate the use of overly broad terms, e.g., transportation, population and demography.

Results of the Committee meetings and the postings review will be disseminated widely.

C.3.3.2.2 Publications

Funding permitting, the Thesaurus will be republished in FY 1987. Serious consideration is being given to publishing in a looseleaf format, to facilitate the incorporation of updates directly into the body of the Thesaurus.

C.4 User Services

The functions of the User Services Unit are to respond to document orders generated from a number of users including; AID/W, USAID, AID Contractors, PVO's, and the general public; to maintain the mailing lists and coordinate the distribution of bulk publications for several AID users; and to maintain the inventory of both original documents and bulk publications in cooperation with CDSI warehouse.

C.4.1 FY 1986 Goals and Accomplishments

C.4.1.1 On Demand Orders

FY 1986 goals set forth in the Statement of Work are:

- a) Fill 1,167 Priority I requests per month (14,000/year).
- b) Fill 250 Priority II requests per month (3,000/year).
- c) Fill 583 Priority III requests per month (7,000/year).

During FY 1986 a total of 13,291 on-demand orders were received and processed. (See Section C.9 for detailed statistical report.) Each order was received and entered onto the ORDERRD database. Charges were calculated where appropriate, the documents were produced, mailed, and the finished paperwork filed. All orders are categorized in order to meet with AID standards; (i.e., priorities I, II, and III). User services processed 16,871 Priority I requests this year showing a 120 percent increase over the expected volume of 14,000. The volume of Priority II requests also showed an increase of 455 percent over the expected volume. Priority III requests decreased by 10 percent.

The DIHF acquired a Minolta RP505 reader-printer in the end of FY 1986. The Minolta does not produce documents as quickly as the Xerox 970 blowback. It does, however, provide a higher quality optical capability. The unit also includes a microfiche viewer. These features allow the operator to view the frame before it is printed and insure that it is properly aligned and focused. The optical feature allows the operator to make clear, readable copies from fiche which would otherwise be considered unreproducible on the 970. The RP505 will be helpful in reproducing poor source documents.

A heightened emphasis has been placed on mission orders. Mission orders are now "tagged" as soon as they arrive in the afternoon and the order is produced as soon as possible. The orders are ready for proofing quickly and are reviewed by the User Services Supervisor and by the PPC/CDIE Quality Control Officer. Although every effort is made to send a clear document, we are still faced with problem documents due to the condition of the source document. We look forward to using the RP505 reader-printer to provide the best possible document for distribution to the missions.

In some cases when a readable copy of a document cannot be found at the DIHF, the original must be retrieved from the CDSI warehouse. During this year, as a direct result of a manual inventory conducted in January, the DDCRD database was modified to include not only box numbers but also warehouse location numbers. This allows User Services a quick retrieval mechanism and insures that boxes are replaced properly. Warehouse locations are also entered for all bulk publications stored in the warehouse.

In addition to placing warehouse information in DDCRD, several other system changes took place in FY 1986. A 3-part invoice was incorporated in FY 1985 to facilitate the tracking of NON-AID orders. Further changes have been made during FY 1986. The invoices now include a pre-payment statement for orders over \$30.00 and a reference to the order number so that payment can be credited as quickly as possible. The document charges are now calculated by the computer so that orders can be processed more efficiently. In addition, the document identification numbers are printed in sequential order for ease of production. These changes have helped to streamline the production of NON-AID orders and will reduce recovery time in case of equipment failure.

User Services has also employed a tracking mechanism for orders generated by the Farming Systems Bibliography, ARDA and other publications. It is now possible to determine how many orders were produced as a result of citations in various publications. This mechanism will prove to be a useful tool in determining the impact of our information products.

Some physical changes have also taken place. In late July, a remodeling scheme was set in motion. As a result, the User Services production area realized a more logical workflow plan. Other phases of remodeling will take place in the coming months.

C.4.1.2 Bulk Mailings

The DIHF was responsible for coordinating several bulk distributions during FY 1986. The mailing lists involved were as follows:

- ARDA - Approximately 7500 recipients of AID Research and Development Abstracts.
- EVAL - Approximately 1200 recipients of PPC/E publications
- FSRB - Approximately 3000 recipients of Farming Systems Bibliography
- POPULATION - Approximately 66 recipients of S&T/POP journals.

There were two distributions of ARDA this year in May and September. The distributions consisted of 7282 and 7513 addressees, respectively. The DIHF produced mailing labels, proofed and categorized the labels, obtained envelopes and

arranged for delivery. The labor and delivery of completed packets to the Postal System was coordinated with an outside mailing service.

The RECIPRD database has been designated to manage all special mailing lists. Extensive research was done in order to compile a complete user profile. This allows the DIHF to maintain the mailing lists without duplication of records. Lateral maintenance is still being done in REQUESTR and RECIPRD with regard to the ARDA mailing list in order to preserve the integrity of all the records involved.

During FY 1986, the DIHF assumed the responsibility of coordinating four EVAL distributions. This responsibility was undertaken at the request of CDIE in order to improve service to their users. The mailings took place in December 1985, April 1986, May 1986, and August 1986. Each distribution was targeted to specific user groups with regard to subject interest. (see attachment for specific quantities)

The DIHF coordinated four FSRB mailings. The first large distribution in February 1986 was completed by an outside mailing service. All other distributions were completed in house. (see attachment)

In addition to "custom assembled" bulk mailings, the DIHF maintains the monthly distribution of the Population Journals. Each month an average of 300 journals are mailed to some 66 USAID and AID/W recipients.

C.4.1.3 Inventory Management

In January 1986, a manual inventory of the Gaithersburg warehouse was conducted. The warehouse locations of all materials were recorded and an effort has begun to update DDCRD to reflect this information. The first phase which involved identifying locations for "W" and "P" boxes was completed this year with support from the System Development Group. Other warehouse materials are being reviewed and sorted for updating.

In an effort to maximize warehouse storage space, 44 pallets of our oldest materials were destroyed in June. This action was approved by PPC/CDIE. The released storage space is now being used for new materials. As new materials are compiled, they are assigned a warehouse location and DDCRD is modified with the new information.

C.4.2 FY 1987 Plans

C.4.2.1 On Demand

Although the User Services section has increased in efficiency, our goal for the coming year is to maintain that efficiency level while improving the quality level. We are presently evaluating the production cycle to assess its effects on the output of document orders. A partial remodeling took place in July to eliminate unnecessary steps in order fulfillment. Further remodeling plans include employing a workstation methodology for

the work area. This will help track the processing of an order and eliminate careless errors.

Another area being considered for redesign is Master File Management. At present much time is spent retrieving master file materials which are frequently requested. The DIHF will begin "tagging" those documents which are presented in ARDA and the New Acquisitions Lists. These materials will be stored in the User Services area for quick retrieval. Multiple copies will be made of those documents which are ordered most often.

Mission orders will continue to be an area of emphasis. The acquisition of the Minolta RP 505 has made the possibility of improving the quality of mission orders a reality. Operating the Minolta is time consuming as it can only print one page at a time. User Services would like to utilize the Minolta for processing all mission orders to insure optimum quality; however, a full-time operator is needed due to the volume of mission orders we receive.

During FY 1986 several system changes were made. We plan to use the computer system to further streamline order fulfillment. We have experienced an increased interest in standing orders and deposit accounts. We plan to employ a tracking mechanism for standing order customers. Plans include a monthly printout of documents being sent for standing orders and the online tracking of funds for deposit accounts. These procedures would apply to the tracking of standing order ARDA recipients as well as the recipients of the Microfiche Index.

Cost recovery has been a matter of concern during the past year. A preliminary analysis of postal costs revealed that a number of factors must be considered before any effective changes can be made. The DIHF will make a further analysis in FY 1987 to insure the changes made will most effectively offset current postage expenditures. In addition, an analysis of "No Charge" orders will be conducted in order to identify production costs with regard to users who receive documents free of charge. This will better equip us to assess our production processes and needs.

C.4.2.2 Bulk Mailing

The distributions undertaken this year required a great deal of time and planning. The factors involved in compiling materials, personnel, and the time spent in actual production are expensive. User Services is now able to compile an estimate of the costs which will be incurred for specific mailings. At present, much of the production work has been done by the DIHF staff. This procedure, however, is not cost effective considering the volume of regular orders which must be processed. A cost estimate should be compiled for each bulk mailing and compensation should be made for additional personnel. This will insure that both the special mailings and the regular orders continue without interruption.

C.4.2.3 Inventory Management

The Inventory Management goal for the coming year is to make more efficient use of the warehouse space and to push for continued reduction of materials requiring storage. On many occasions we must retrieve materials from "W" and "P" boxes which are stored in the warehouse in locations that are difficult to reach. A rearrangement plan is being considered that will place more frequently requested and more recent boxes in more convenient locations. A rotation of PPC bulk publications is also being considered. These publications should be placed in the same general area in sequence from newest to oldest. Finally, a review of old materials should be conducted to determine what should be destroyed. The remaining older materials should be placed on the top slots as they are seldom ordered.

The above-mentioned goals will insure a more efficient method of storage which will clarify procedures for User Services and make retrieval easier for warehouse personnel.

C.5 Micrographics

Task Summary

The DIHF Micrographics function includes providing all staff, equipment, facilities and services needed to generate and distribute microfiche copies of documentation resulting from AID-funded project and program activities. The documentation is provided to the Micrographics Section from two sources: DIHF Cataloguing (Institutional Memory: Program-funded) and AID Bureaus (Agency Records Management: 'OE'-funded). They are processed separately, by source. The specific tasks relating to processing of each type of document include:

- a. preparation of documents for conversion to microfiche
- b. creation of microfiche documents according to established production quotas or schedules
- c. performance of quality inspection to ensure that all fiche comply with established specifications
- d. reproduction and distribution of diazo duplicate microfiche for AID-specified, standing order and on-demand recipients.

During the fiscal year, all of these tasks were substantially or completely accomplished according to Statement of Work specifications.

The procedures required to accomplish these tasks vary according to the source of the documents. Such variations affect conversion turnaround time, microfiche title creation and duplication volume.

C.5.1 Institutional Memory (IM)

C.5.1.1 FY 1986 Goals

FY 1986 goals proposed in the FY 1985 Annual Report were:

- a. film approximately 5000 documents
- b. improve quality control procedures for filming and storing microfiche
- c. continue to integrate processing and filming procedures of Institutional Memory and Agency Records Management operations
- d. continue to refine operations to accomplish tasks within financial limitations; monitor throughput volumes for indications that additional resources are needed
- e. respond to (demand) requests for approximately (3500) microfiche duplicates distribution within the appropriate time frame

C.5.1.2 FY 1986 Accomplishments:

1. Microfilmed a total of 4903 documents for AID-supported activities including 234 documents microfilmed through Agency Records Management (ARM) activities. The 4669 documents filmed in the IM format required 6570 fiche and 371,545 frames; a level consistent with previous year's performance.
2. This total, compared with the FY 1985 total of 4444 documents, represents an increase of 10 percent which was achieved using slightly fewer resources for document preparation. The proximity of the actual vs. target production validates the annual goal of 5000 documents. The shortfall is due to the lack of available work attributable in part to the volumes of documents deemed "not filmable" due to poor quality of the original copy and of documents acquired through ARM activities.
3. Our monitoring of production throughput indicated that no additional resources were needed this year. Accordingly, resources used for document preparation were lower than for FY 1985.
4. Improvements in microfiche quality were obtained through a combination of personnel, practices and equipment. In November, a new micrographics technician was hired with over 7 years' experience in micrographics. Several tools for film handling and inspection were purchased and procedures for their use implemented. As a result, quality defects and inspection results are brought to the attention of management and the filmer service bureau more quickly and preventative or corrective adjustments made.
5. Routine User Services requests for diazo duplicates accounted for about 2,000 of the total fiche distributed. In addition, approximately 20,000 PN fiche were distributed to Peace Corps, 3,000 to VITA, 1250 for LOC and 1500 in support of various outreach activities (including Islamabad and Quito). The 47,390 standing order fiche indicated in the statistical tables indicates not a decrease from FY 1985, but an increase; the figures in the FY 1985 statistics are in error.

C.5.1.3 Additional Tasks Undertaken

- a. Assisted Acquisitions efforts by providing a staging area in NS and coordinating the identification and delivery of 34 boxes from A/NE Bureau and 5 boxes from Africa/PD over the year.
- b. Provided Quito with information about a local source for repair of their fiche reader/printer equipment.
- c. Provided manpower to arrange classified document files in support of cataloguing activities.

- d. An AID/Pest job was undertaken but was suspended before completion due to problems experienced by the USDA subcontractor.
- e. Performed a study of the fiche files in 105 to determine the feasibility of installing a fiche duplicator there.
- f. Evaluated and recommended a reader printer to be 970 back-up.
- g. Prepared a special collection of Africa evaluation documents for AFR/DP to be updated on a quarterly basis.
- h. Provided replacement lenses for Pakistan and Haiti fiche equipment.
- i. Compiled a list of mission microfiche equipment capabilities.
- j. Provided referral of bureau personnel to RR & S staff.

C.5.1.4 FY 1987 Goals

The contract requirement to film 5000 documents and in SIP and outreach support

Charts:

FY 1987 Standing orders and Index distribution

C.5.2 Agency Records Management

C.5.2.1 FY 1986 Goals and Accomplishments

The original Statement of Work called for the conversion of S&T bureau documents to fiche and the updating of A/NE, LAC, ARA, Contracts and S&T fiche files. At beginning of the fiscal year it was apparent that LAC and S&T would not be available for conversion as planned, but there were plans to start the 8 month LAC conversion by January 1986. The LAC conversion started in mid-April and was completed ahead of schedule in mid-August.

The estimated filming requirement as of October 1985 were:

<u>Activity</u>	<u>Bureau/Office</u>	<u>Volume of Documents:</u>	
		<u>Projected</u>	<u>Actual</u>
conversion	LAC	8,800	7,120
update	Contracts	4,200	8,142
"	A/NE	5,800	6,059
"	AFR/RA	2,400	1,972
"	LAC	1,000	0
"	AFR/PD	4,200	6,540
<u>mixed</u>	<u>ARA,ANE residual</u>	<u>1,800</u>	<u>incl. above</u>
Total		26,200	29,831

C.5.2.2 Additional Tasks Undertaken

- a. The Loan Files conversion was begun in September; the first production returns will be reported in FY 1987. The total conversion is estimated to include about 11,000 documents.
- b. A special collection of A/NE project papers for A/NE/TR/ENV was maintained and expanded to include over 200 inactive project documents submitted by that office in August.
- c. The variable distribution system developed for Asia bureau was first expanded to include TR/EFE project documents then replaced with a system based on individual filesets as a result of the A/NE merger.
- d. A special distribution for the Contracts Office encompassed creating a third set of microfiche to be distributed by SER/MO to the bureaus' central files. The fiche set originally created for the auditors was discontinued and responsibility for it was assumed by the Contracts Office.
- e. Mission Microfiche: Additional materials were developed in support of the program to include missions and posts in the records management "loop" for project documents. A brochure describing the program was finalized and a new draft of installation/useage procedures was submitted for review.

C.5.2.3 FY 1987 Goals

- a. finish FM conversion by March 1, 1987
- b. begin S&T conversion by March 2, 1987
- c. achieve regular updates for each file
- d. ARA/PD database merger
- e. inter-bureau distribution database
- f. front end enhancements
- g. mission outreach

Charts: Bibtype study of updates
FY recap of monthly production
Annual comparison all FYs to date
FY 1987-89 production schedule
FY 1987 only production schedule
Total distribution to date

C.6 Publications and Outreach

C.6.1 Publications

C.6.1.1 Acquisitions Lists

Acquisitions lists are designed to inform users of current materials recently added to the DIS. New Acquisitions: Technical Reports lists technical reports published in the last 2 years that have recently been added to the DIS and New Acquisitions: Project Descriptions provides project abstracts recently added to the DIS for AID projects begun in the last 2 years.

C.6.1.1.1 FY 1986 Accomplishments

New Acquisitions: Technical Reports was produced on a monthly basis, except for the last issue, which was combined for August and September, for a total of 11 issues. New Acquisitions: Project Descriptions was produced bi-monthly for a total of 6 issues. Beginning in February 1986, both lists were produced using a laser printer which greatly enhanced their appearance and readability.

At year end, 304 copies of New Acquisitions: Technical Reports and 225 copies of New Acquisitions: Project Descriptions were being distributed to 25 USAID missions and 26 AID/W recipients. CDIE personnel on TDY to various Missions in FY 1986 encountered an enthusiastic response to the lists.

A prototype of New Acquisitions: Non-AID Documents, a list of documents recently acquired by the AID library, was developed and submitted to the AID library for review.

C.6.1.1.2 FY 1987 Goals

New Acquisitions: Technical Reports and New Acquisitions: Project Descriptions will continue to be produced on a monthly and bi-monthly basis, respectively. Bi-monthly publication of New Acquisitions: Non-AID Documents will begin in November 1986. A guide to citations explaining each data element in a citation will be developed and included in all the lists. Other improvements will be made as they are identified.

C.6.1.2 AID Research and Development Abstracts

C.6.1.2.1 FY 1986 Accomplishments

The FY 1986 forward plan called for producing four issues of ARDA and for linking the publication of ARDA by season to a quarterly production schedule.

ARDA Volumes 12:2 and 13:1, each containing 150 abstracts, were printed and distributed. Preparation of ARDA Volume 13:2, containing 100 abstracts, was completed and typesetting was begun at the end of FY 1986. In keeping with the concept of ARDA as a current awareness publication, all of the technical documents presented in ARDA in FY 1986, with a few exceptions, were

published in 1985 or 1986. Plans to link ARDA by season to a quarterly schedule were not carried out primarily due to delays encountered as a result of the declining number of technical reports submitted to DIHF Acquisitions.

In May 1986, a detailed briefing explaining the history and status of ARDA was held for Paula Goddard. While the briefing generated a few suggestions for improvements, the consensus was that ARDA continue to be produced as it has been in the past albeit with an exclusive emphasis on current materials and in strict accordance with a quarterly production schedule.

A questionnaire and mailing list update was included in ARDA Vol. 13:1 for all foreign recipients of ARDA. Data received from returned questionnaires will be compiled and analyzed and a report prepared in early 1987. A mailing list update for all domestic recipients of ARDA will also be conducted in 1987.

C.6.1.2.2 FY 1987 Goals

Problems encountered in obtaining a sufficient number of technical reports for presentation in ARDA are likely to continue to pose a challenge to producing ARDA on a quarterly basis. Plans call for publishing a double issue, Volume 13:3/4, in December provided that 200 appropriate technical reports can be identified in time for processing. Volume 14:1 would then be published in March, Volume 14:2 in June and Volume 14:3 in September for a total of four issues in FY 1987. The Publications Coordinator will work closely with DIHF Acquisitions to monitor the number of technical documents obtained for presentation in ARDA. All potential sources of technical documents will be explored.

C.6.1.3 Bibliography of Readings in Farming Systems

C.6.1.3.1 FY 1986 Accomplishments

Volume II of the Farming Systems Support Project's Bibliography of Readings in Farming Systems, produced by CDIE in cooperation with the Bureau for Science and Technology's Office of Agriculture, was published in English, French, and Spanish. Approximately 3000 copies of the English version, 800 of the Spanish, and 400 of the French were distributed. In addition, all abstracting was completed for Volume III of the bibliography and 3000 copies of the English version printed and distributed.

The DIHF acquired, catalogued, indexed, and abstracted materials for the bibliographies, translated abstracts into French and Spanish, and printed and distributed the bibliographies.

C.6.1.3.2 FY 1987 Goals

Translations for the Spanish and French versions of the bibliography will be completed by the end of CY 1986 and the bibliographies will be printed and mailed in January.

Volume IV of the bibliography, the last volume, is scheduled for completion in June 1987. It has not been determined whether the last issue will be translated into French and Spanish.

C.6.1.4 Special Bibliographies

C.6.1.4.1 FY 1986 Accomplishments

Plans called for producing six special bibliographies on the subject areas covered by the initial series of CDIE's Project Manager's Reference Guides (PMRG). For various reasons, the PMRG concept and the initial PMRG's were shelved indefinitely. As a result, only two draft special bibliographies were prepared; these versions were reviewed by CDIE but further action was not specified. Due to constraints on staff resources, the development of draft versions of the four other bibliographies was delayed.

C.6.1.4.2 FY 1987 Goals

Given the difficulties inherent in reaching a consensus on the scope and utility of the special bibliographies as well as limited outreach/publications resources, it is recommended that discussions be held in early FY 1987 to review this contract requirement.

C.6.2 Outreach

C.6.2.1 CDIE Promotional Materials

C.6.2.1.1 FY 1986 Accomplishments

A primary outreach accomplishment in FY 1986 was the development of a standardized, attractive information package describing CDIE products and services. At the beginning of FY 1986, scattered CDIE information materials were compiled into a briefing booklet for use by CDIE personnel in TDY's to USAID missions. Refinements were made to the briefing booklet for each TDY. In August 1986, the booklet was revised to encompass all CDIE activities and to include input from each division and unit. Finally, a briefing folder was developed from the booklet. The folder lists CDIE contact points and contains one or more of 14 information sheets describing CDIE products and services, which can be combined to cover the specific interests and needs of the audience receiving the briefing. The folder had been used for a number of briefings by the end of FY 1986.

C.6.2.1.2 FY 1987 Goals

The briefing folder is designed so that feedback can be easily incorporated into the various information sheets. Once the supply of printed folders is exhausted, the copy will be reviewed and any necessary changes made before additional copies are printed.

C.6.2.2 1985 MINISIS Users Group Meeting

A primary outreach accomplishment achieved in early FY 1986 was preparing for and holding the 1985 International MINISIS Users Group (MUG) Conference. The DIHF provided a wide range of conference management services in support of MUG, which was held at the International 4H Center in Chevy Chase, MD, from October 28 through November 1, 1985. Lodging for many of the 150 attendees of the conference was arranged at the 4H Center; assistance in locating suitable accommodations was provided to other attendees. In preparing for MUG, various MINISIS databases were developed to help manage mailing lists, accommodation lists, conference invoicing, and other requirements. A directory profiling MINISIS installations around the world was developed, printed, and distributed. Much effort went into coordinating the MUG technical program and conference logistics with IDRC. Arrangements were made for the simultaneous translation of MUG proceedings into English, Spanish, and French. Tours of local information institutions including the World Bank/IMF, the National Agriculture Library, the National Library of Medicine, the Library of Congress, and the DIHF were arranged for MUG attendees. Copies of all papers presented at the conference were made available, and in cases where the supply of copies was exhausted, names and addresses were taken and the papers sent at a later time. The conference is further evidence of the expanding role CDIE/DI is taking in international development information networking.

C.7 Training and User Education

The purpose of the training and user education function is to inform potential users about CDIE's development information services and resources, specifically the Development Information System (DIS), and to promote full utilization of the three database management and access systems associated with the DIS (MINISIS, MenuDIS and MicroDIS). Three broad, complementary areas of activity are associated with the performance of this function: briefings on information systems resources and supporting DIHF services, training in systems use, and ongoing communication with systems users.

C.7.1 Requirements and Accomplishments for FY 1986

C.7.1.1 Conduct Briefings for Potential Users

Briefings provide an opportunity to inform the AID and development community at large of the information systems, resources and services that AID has developed and makes available through the DIHF. There are four target audiences for briefings: AID direct hire staff, AID contractors, developing country counterparts, and other development organizations. Contract requirements call for one briefing per month (or 12 per year).

In FY 1986, a total of 19 briefings were provided, exceeding requirements by seven. Sixteen briefings were presented to a total of 40 AID staff and contractors from five missions (REDSO/EA, Ecuador, Haiti, Grenada, India), four bureaus (LAC, S&T/EY, FVA/PVC, PRE/H) and CDIE (new AED and PWA contract staff). One briefing was provided to one developing country counterpart (UNEP Library, Nairobi), and two briefings were provided to six individuals from other development organizations (CIDA and JICA). All briefings were held at the DIHF or DIHF Annex.

Host country counterparts and individuals from other development agencies were also briefed in the course of two conferences. During the MUG 1985 meeting in Washington, DC, five participants took the opportunity to tour the DIHF. Fifty participants at a meeting of the European Association of Development Research and Training Institutes Development Information Working Group in Brighton, England (EADI 1986) received copies of a briefing paper on CDIE information systems.

Two mechanisms for identifying opportunities for future CDIE and DIHF-specific briefings were also developed in FY 1986 with input from the DIHF. Discussions with the AID Training Office led to an expanded role for CDIE in that office's New Entry class, including both an overall CDIE briefing and a hands-on workshop using CDIE's information systems, resources and services. A matrix of other AID Training Office courses was prepared and submitted to CDIE management. The DIHF also participated in the work of CDIE's Networking Committee, seeking to establish routine contact with information units in AID missions and other AID/W offices.

Marketing of the DIS (and its associated systems) as a CDIE information resource has been identified as a key component of the training and information program, based on the findings of the Training Requirements study completed in FY 1985. In the DIHF's FY 1986 Forward Plan, coordination of this marketing effort within the framework of overall CDIE marketing and outreach programs was therefore identified as an important issue to be resolved (Section C.7.3). As a CDIE outreach strategy was not formulated during FY 1986, a Contractor Coordination Committee was initiated by the DIHF in order to provide an interim mechanism for coordinating briefings and contractor services to end-users.

C.7.1.2 Design and Implement Training Program

The design and implementation of the training program is the purpose of the training function. This activity has four sub-tasks: design training program, conduct training sessions, develop training documents and user education materials, and evaluate training program.

C.7.1.2.1 Design Training Program

The training program is required to provide three groups of AID personnel with appropriate levels of skills in accessing DIS resources:

- (1) decision makers and program managers
- (2) project designers and evaluators
- (3) information specialists and research analysts.

The FY 1986 Forward Plan proposed formalizing a training action plan for FY 1986 in order to ensure development of training modules appropriate to each of these target groups.

Throughout much of FY 1986, however, both MenuDIS (designed for groups 1 and 2 above) and MicroDIS (designed for group 3 personnel in AID missions) were under development and testing. Training of individuals interested in using either of these systems thus tended to be highly responsive and individualized. Training of CDIE's Research and Reference staff (in group 3 above) in DIS access via MINISIS commands was also responsive to the needs of new staff and current staff who had not received training in the past. Formulation of a more structured training program was therefore not appropriate at this time.

C.7.1.2.2 Conduct Training Sessions

Training must be targeted to the type and level of use anticipated by the individual. The most basic level of training provides an understanding of database content and simple techniques for using the appropriate database management system (e.g., MenuDIS or MicroDIS). Intermediate training provides hands-on experience in more complex techniques in any of the systems, while the most advanced level of training is provided to information specialists using either MINISIS or MicroDIS.

Contract requirements call for one training session and one follow-up session per month, or a total of 24 sessions per year. For reporting purposes, MINISIS/MenuDIS and MicroDIS training are discussed separately.

MINISIS/MenuDIS: In FY 1986, a total of 33 training sessions were conducted at all levels, including 23 initial sessions (8 using MINISIS, 15 using MenuDIS) and 10 follow-up sessions (5 in MINISIS, 5 in MenuDIS). Seventy individuals attended the initial sessions, while 14 participated in one or more follow-up sessions. MINISIS training included some sessions in all major processors (Query, Index, Print, Entry, Modify). For individuals accessing MenuDIS from an IBM or Wang PC, training also included instruction in use of telecommunications software to connect with the DIHF computer and to download records.

MicroDIS: In its first year of development, MicroDIS was demonstrated to 33 offices or agencies, including 9 AID missions, 6 developing country institutions or projects, 4 development agencies, 8 AID/Washington offices or contractors, 2 other U.S. government agencies, and 4 universities. It was also demonstrated to participants at two international development information conferences: the MUG '85 meeting in Washington, DC, and the EADI 1986 meeting in Brighton, England. The most extensive training was provided at the primary MicroDIS test site, the USAID/Cairo Development Information Center.

For a list of all sites receiving MenuDIS or MicroDIS training and demonstration, refer to the Exhibits C.7-1A and C.7-1(B).

C.7.1.2.3 Develop Training Documents and Materials

Training documents and user education materials were developed in FY 1986, as needed, to support the above sessions and demonstrations. A total of 15 different documents or materials were developed or initiated during the year. Of this total, three were newly designed manuals (MenuDIS Quick Reference Guide, MenuDIS Users' Manual for non-AID installations, and a MicroDIS manual, including detailed Cataloguing Guidelines). Seven were documentation or packets to support training (MINISIS command summaries and exercises, REQUEST database packet, MicroDIS cataloging examples, MicroDIS and MenuDIS HELP messages, instructions for using telecommunications software, New Entry information workshop plans), and four were promotional items (MenuDIS and MicroDIS descriptions/flyers, Brighton conference paper and MicroDIS article for Frontlines).

One of the objectives stated in the FY 1986 Forward Plan was to complete a prototype handbook designed to provide AID missions with guidelines for establishing and operating a development information center. Work completed to date includes drawing together information that has been provided to mission information centers in the past, and discussing potential handbook content with all AID mission information center personnel briefed by the DIHF.

C.7.1.2.4 Evaluate Training Program

At the end of FY 1986, all CDIE/DI/R&RS staff were interviewed to determine their current level of expertise in using MINISIS and their potential training needs. As both MenuDIS and MicroDIS were in development during FY 1986, evaluation mechanisms were used primarily to elicit feedback on the ease of use of the system and supporting training documentation, rather than on the effectiveness of the training program itself.

Several evaluations of MenuDIS were undertaken, one shortly after initial software design was completed, one after 6 months of system use, and one at the end of FY 1986. In order to be able to evaluate the system, an optional online user survey was installed in April. In addition, follow-up contact was made with all offices into which MenuDIS was introduced to determine if the system was being used, and if not why not. Results of the 6-month evaluation are included in the June 1986 Quality Assurance Report.

Of particular importance to future training and documentation for MenuDIS (and possibly also MicroDIS) is the finding of the online survey that only 23 percent of users tend to refer to the HELP messages, and only 33 percent make use of the manual.

C.7.1.3 Provide Ongoing Communication with User Communities

There are four aspects of this component of the training program: maintaining trainee records, maintaining user support, providing users with routine communication of system-related information, and maintaining communication with the MINISIS user community at large.

As a basis for all future communication with users, a training database was established in FY 1986. Included are records of all individuals trained, the sessions they attended, materials distributed, mailing information, etc.

Following initial training, ongoing support is provided to users of all systems by the Systems Development Group. Every effort has been made to ensure that users are aware of the contact person and telephone number for the system which they are using.

At least three different user communities have developed over the past year (MINISIS, MenuDIS and MicroDIS). It has become apparent that a different type of communication will need to be directed to each group to apprise users of system-related news. At the same time, a common communication mechanism for all systems might assist in raising the visibility of CDIE systems resources throughout the agency. A prototype newsletter was designed to fulfill this dual purpose, tentatively entitled DISystems. Further work was required in developing the idea, however, and no issues were circulated. Apart from communication with other MINISIS users during the MUG 1985 meeting in Washington, DC, descriptions of several procedures and applications developed by the DIHF were provided to IDRC for potential inclusion in the MINISIS User Group Newsletter.

C.7.1.4 Additional Tasks Undertaken

In order to promote DIHF staff development and to provide staff with an understanding of the context within which DIHF activities are performed, a program was initiated to routinely enroll appropriate staff in the AID New Entry course. Fourteen DIHF staff participated in Week 1 sessions (AID Overview) during FY 1986, and one participated in Week 3 (Project Design).

C.7.2 Requirements and Plans for FY 1987

C.7.2.1 Conduct Briefings for Potential Users

To date, briefings have primarily been conducted in response to "events", e.g., Washington TDYs by AID mission or development agency personnel, or the start-up of an information component of a project. It is anticipated that briefings will continue to be primarily responsive during FY 1987.

However, in FY 1986, the groundwork was established by CDIE and its contractors for more active identification of briefing opportunities, e.g., via the Networking Committee, AID Training Office courses, and the Contractor Coordinating Committee. Planning was also initiated for the redesign of NS 3659 to provide AID personnel in the State Department building with self-service access to information about CDIE services and resources, including access to MenuDIS. Initiation of this type of activity will continue to be carefully coordinated with CDIE.

Regarding briefings and presentations outside the Agency (e.g., to other development agencies and developing country personnel), it is also planned that the DIHF Training Coordinator will continue to monitor national and international development meetings in which training in the use of information systems technology is involved, and will participate as appropriate.

A minimum of twelve briefings will be conducted during FY 1987.

C.7.2.2 Design and Implement Training Program

C.7.2.2.1 Design Training Program

A DIS training program must be structured to the extent that adequate training opportunities are planned for each of the three targeted user groups (managers, designers/evaluators, information specialists) throughout the agency, and individualized to the extent that specific users' needs (e.g., on-site training or downloading via the particular communications software used by the trainee) and time constraints are addressed.

In FY 1987, the tailored, on-site approach to individual sessions will be retained to the extent that is necessary, but identifying and training potential users will gradually become more structured (e.g., targeted to specific, potential applications, with regularly scheduled training sessions). A strategy or plan for accomplishing this will be developed during the first half of FY 1987, following the first year of test use of both MenuDIS and MicroDIS and completion of version 2.0 of both systems. The identification of appropriate MenuDIS applications will be coordinated with the CDIE Research and Reference staff to

minimize end-user confusion about when to use MenuDIS vs. R&RS services.

C.7.2.2.2 Conduct Training Sessions

Training sessions will be conducted in response to specific requests as well as on a scheduled basis. At least 12 training sessions and follow-up sessions will be conducted during the year.

C.7.2.2.3 Develop Training Documents and Materials

There are several types of documentation and materials which must be completed in FY 1987 to support training in and use of DIHF's three database management and access systems.

The MenuDIS Quick Reference Guide will be updated to reflect version 2.0 as well as ongoing changes. This document will be converted into a MenuDIS Reference Manual, primarily for use by trained, repeat users of the system. For one-time or infrequent users, especially those using the public access terminal in the AID library, a graphic, "how-to find x" poster or flip chart will be developed. The MenuDIS Users Manual for non-AID installations will be updated as necessary to reflect changes in version 2.0.

The MicroDIS Users Manual will be updated upon completion of version 2.0 and converted into a MicroDIS Reference Manual. A companion MicroDIS Users Guide will be developed to provide simplified, task-oriented instructions for system installation and use. These two documents, along with the MicroDIS Cataloguing Guidelines, will be issued together to new installations in looseleaf notebook format.

MINISIS/DIS documentation has been developed in segments over the years and in FY 1987 will be compiled, indexed, issued in looseleaf format, and provided to all CDIE Research and Reference staff.

A Development Information Center Handbook for AID missions will be developed in looseleaf format, and contents will be prepared in collaboration with other CDIE contractors. A prototype version, including an outline of all planned sections as well as available content pages, will be sent to selected AID mission information specialists for review and comment. Based on feedback, the handbook will be modified, supplied to other selected AID missions, and updated with additional sections as available.

The version 2.0 changes to the MicroDIS Reference Manual will be completed in the first quarter of FY 1987, along with preliminary development of the MicroDIS Users Guide, design of the prototype DIC Handbook, and design of a "how to" graphic display for MenuDIS. A task-oriented index and compilation of MINISIS/DIS documentation will be completed in the second quarter. Version 2.0 changes to the MenuDIS Reference Manual will be completed in the third quarter. DIC Handbook contents, manual updates and additional training aids and system descriptions will be developed on a continuous basis.

C.7.2.2.4 Evaluate Training Program

Evaluation activities will continue for MenuDIS as in FY 1986 on an ongoing basis. MicroDIS training evaluation will be introduced once training becomes more routine.

C.7.2.3 Provide Ongoing Communication with User Communities

A major effort will be made in FY 1987 to begin regular publication of a systems update bulletin, tentatively entitled DISystems. It is planned that users of each system will receive a quarterly, two-page update for that system. As there are three systems, one bulletin will therefore be produced each month.

Other mechanisms for ongoing communication and support which were provided during FY 1986 will be continued in FY 1987.

C.7.2.4 Training Issues

The amount of documentation that is required to brief, train, and inform users of three different information systems is significant. Additional staff support may be needed at various times throughout the year to assist in preparing these materials so that users are assured of receiving the most up-to-date information available in their training courses and manuals.

With the introduction of MenuDIS, two distinct groups of new users are evolving: one-time or infrequent users who access the DIS via the public terminal in the AID library and have no training at all, and occasional users who have some training but use the system infrequently. The development of the first group raises questions about the advisability of allowing them to do broad subject or retrospective searching, as these users do not have the skills to ensure that their search results accurately reflect what is available in the system. On the other hand, considerable time is sometimes spent in identifying, training, and supporting AID personnel in the second group, only to find that they do not have the time to use the system frequently enough to practice what they have learned and to understand the system's idiosyncracies. Guidance is needed from CDIE on the specific objectives and priorities for providing database access to end users. (To relieve the workload for R&RS for certain types of searches, or for all types of searches, or from particular categories of users? To increase the number of users or use of the DIS? To simply inform people of what is available on the system? To minimize the turnaround time to obtain search results?) so that appropriate user groups can be targeted and the training program can be designed to meet these objectives.

AID contractors are one target group which could be considered for training in FY 1987. If one of the objectives of developing MenuDIS is to expand use of DIS resources, especially in the project design and implementation process, and as more and more of the Agency's work is completed by contractors, it would seem that contractors logically should be alerted to DIS resources. Thorough training of selected contractors in the use of MenuDIS would relieve some of the demand on R&RS staff time and possibly expand use of the DIS beyond what contractors would normally

request from R&RS. In view of current limitations on computer port capacity, "selected" contractors could initially be limited to those likely to have occasion to search the system frequently (e.g., those operating AID-sponsored clearinghouses), and other contractors would be included upon the request of AID bureaus. A potential spin-off benefit from this contractor focus would be to increase contractor awareness and support of the document acquisitions effort.

C.7.-1(A) MenuDIS FY 1986 Installations

AID Locations

LAC/DR
LAC/Information Management Study (Birch & Davis)
ANE/PD
AFR/PD
IRM/MPS
S&T/AG (2)
S&T/EY (VITA)
S&T/RD (R. Nathan Associates)
FVA/FFP/PDD
AID Library

Non-AID Locations

World Bank, Information Resources Management Division Westreco Inc.

C.7.-1(B) MicroDIS FY 1986 Installations and Demo Sites

AID Classified Document Project
AID Library (circulation only)
AID Training Library
AID Vector Biology Project
AID WASH Project
AID/A/SCI
AID/FVA/PVC
AID/PRE/Center for Privatization
AID/PRE/Housing
AID/S&T/AG
AID/SER/MO
Agroforestry Outreach Project (Haiti)
Canadian International Development Agency
Centro Paraguayo de Est. Sociol6gicos (Paraguay)
Commonwealth Agricultural Bureau (UK)
Egypt-Sudan Economic Integration Fund (Egypt)
Environmental Quality International (Egypt)
Export Development Bank of Egypt (Egypt)
Japanese International Cooperation Agency
Johns Hopkins University
Peace Corps
Population Center Foundation (Philippines)
Postharvest Institute for perishables (Idaho)
UNESCO (France)
USAID/Cairo
USAID/Port-au-Prince
USAID/Khartoum
USAID/La Paz
USAID/Lima
USAID/New Delhi
USAID/Panama City
USAID/Port-o-Spain
USAID/Quito
USAID/REDSO/ESA
USIA
University of Idaho
Winrock International

C.8 Quality Assurance

This function is divided into two operations -- quality assurance and service evaluation. Both monitor contract activity, but from different perspectives. The quality assurance component measures progress using production measurements; the service evaluation component assesses activity using quality indices. The goal of these efforts is to provide information and guidance to enable the Development Information Handling Facility (DIHF) to generate products and services which meet or exceed AID's quality and quantity standards.

C.8.1 FY 1986 Accomplishments:

C.8.1.1 Quality Assurance (quantity component)

This component is responsible for assuring that the DIHF meets the production quotas and schedules set by the Agency. During FY 1985, a production monitoring system was designed and implemented. This system divided the DIHF into discrete functions covering its entire operational cycle: Document Acquisitions; Cataloguing; Filming; Abstracting/Indexing; User Services; Special Publications; and Systems. (Training was not included because it was new and lacked measureable indices from the Agency). This organizational breakdown aids in identifying and localizing problems, gauging their impact on other functions, and determining solutions. Each activity is evaluated based on its past performance and current contract requirements.

Analyses were provided each month beginning in January 1985. In the current fiscal year, monthly reports were submitted through January 1986. Since then, they have been issued on a quarterly basis. This change in schedule was initiated at the Agency's request. A FY 1986 Quality Assurance Report was submitted to A.I.D. in October 1986 which reviews the entire year; it is presented in the next section. Each report is circulated to the DIHF project manager, his functional supervisors, and the AID project manager and his staff.

The utility of the Quality Assurance effort can be measured by reviewing the facility's performance record. Output levels during FY 1986 showed improvement over FY 1985. As a result, the DIHF is meeting the Agency's cumulative 2-year goals in most categories. Details of this performance are discussed in the FY 1986 Quality Assurance Report in the next section. DIHF supervisors are more sensitized to statistical reporting and the importance of devising improved operational efficiencies to ensure contract goals and objectives. Also, relationships between the different functions are more clearly understood and integrated. Those categories which are not satisfying targets have been highlighted; causes and solutions have been proposed.

C.8.1.2 Service Evaluation (quality component)

This component is responsible for maintaining the utility of the DIHF's products and services. During FY 1986 several approaches were studied to determine the most efficient and standardized

methods for collecting user feedback. A series of mechanisms were put into effect that year and additional ones were initiated during FY 1986. Together, these channels provide information on the following items: on-demand document and microfiche service; the AID Thesaurus; MicroDis; MenuDis; the Development Information System; and DIHF special publications which include Project and Technical Acquisitions Lists and AID's Research and Development Abstracts Publication. Once this data is collected and analyzed, steps can be taken to continue or alter products and services as needed. Each of these areas is explained below:

1. On-demand document and microfiche services. All outgoing orders include questionnaires which focus on the quality of the products and services of that order.
2. AID Thesaurus. Each Thesaurus is distributed with a questionnaire enclosed. This year 144 changes were proposed by users.
3. MicroDis. The microcomputer library system is currently being tested at five beta sites, one of which is the USAID/Cairo. Feedback is collected through cables, onsite demonstrations, and phone calls. As a result of these tests, MicroDis was upgraded from version 1.0 to 1.1 this year, reflecting desired improvements suggested by users. (See Systems Section of this report for additional details).
4. MenuDis. A voluntary on-line questionnaire was appended to MenuDis in May 1986. Questions regarding the menu commands, their logical order, their ease of use, etc., are provided.
5. Development Information System. The questionnaire appended to MenuDis also lists questions concerning the DOCUMENT, PROJECTS, and CATALOG databases.
6. Special Publications -- ARDA 13:1 was sent out with a questionnaire. Technical Acquisition Lists are sent out every month; Project Acquisition Lists are distributed every quarter. Alternating issues of each publication had questionnaires enclosed. None have been sent out since July 1986.

Informal channels are used for evaluating abstracts, indexing, cataloguing, and training. In this context, informal means that users are not approached with a structured set of questions; instead, they take the initiative and relay their problem to the Quality Assurance Coordinator and/or the appropriate DIHF supervisor. During FY 1985 the Coordinator was the focal point for this activity. Statistics in FY 1985 proved that problems cited in these categories were generally small and unrelated. During FY 1986 DIHF supervisors became the dominant contact, since they can make changes immediately to the system.

The Agency requirements for this activity state that reports should be produced every 6 months. During FY 1986, two Service Evaluations were issued: one in December 1985 and the other in June 1986. Each report summarizes the results collected from the above sources.

C.8.2 Plan for FY 1987 Activities

C.8.2.1 Quality Assurance

Quality Assurance Reports will continue to be issued each quarter and an annual review will be delivered in October 1987. These reports will be presented in the current format using graphs and statistical tables to support the text. Categories will be added or deleted as the need arises. Reporting changes include: restructuring the tables for system usage to focus more on group activities; tracking PPC bulk mailings with more detail to include the number of titles, copies, and dollar amounts; and measuring the progress of MicroDis and Training efforts.

C.8.2.2 Service Evaluation

Service Evaluation Reports will be issued every 6 months; the next report is scheduled for December 1986. All of the mechanisms now in place will be used in the next report and in January they will be evaluated. If the number of responses is low (under 10 percent), or if the answers given do not prove useful for making decisions regarding product and service development, then new techniques will be investigated or current questions will be revised.

C.9 Management

The contract Statement of Work outlining management requirements enumerates the tasks designed to ensure the effective use of resources to carry out DIHF work. LTS has continued its flexible management approach which is designed to respond to specific contract requirements, to adopt to CDIE/DI's changing program goals, and to adjust operations in response to changing financial scenarios.

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 actions to 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 FY 1986 Accomplishments

During FY 1986, the following activities were accomplished:

C.9.1.1 Staff Organization

Exhibit C.9-1 illustrates the project organization and staffing composition during FY 1986. This structure reflects the configuration of personnel along functional lines reflecting the various areas of work in which the DIHF is engaged. During the year, personnel changes and re-designation of CDIE priorities and requirements caused minor organizational changes to occur. Specifically, the DIHF no longer has an Outreach Coordinator, but has blended outreach responsibilities into the various functional areas.

C.9.1.2 Reporting

During FY 1986, refinements in DIHF operational reporting procedures were instituted and improved formats and presentation of statistical information initiated.

LOTUS/SYMPHONY spreadsheet models were developed to enable DIHF and CDIE management to quickly determine the project's financial status from a number of perspectives and to provide for more accurate and timely reporting of expenditures and funding levels, invoicing, and financial reporting. Assistance was also given to the CDIE/DI Systems Coordinator in using LOTUS 1-2-3 spreadsheet and graphic display features. Formulas and macros were developed to expand and improve on the creation of charts and graphs using

the H-P plotter to depict both DIHF and CDIE statistical information. The Quality Assurance Report (see Section 8) is an example of the type of systems support given to reporting tasks during the year.

C.9.1.3 Operational Planning

During the second year of operations, overall management became more decentralized. Using the plans set forth in the FY 1986 Forward Plan, primary management emphasis was given to monitoring the work of the operating supervisors to whom day-to-day responsibilities had been delegated. Review sessions to resolve problems, discuss personnel needs, and correct procedural deficiencies were held as required. In addition, emphasis on inter-contractor coordination among other CDIE operations (AED and PWA) was stressed and supervisory-level coordination and planning was encouraged to the maximum extent possible. These efforts were designed to ensure open lines of communication and prompt resolution of issues that may have been created due to the complex inter-relationships among the different organizations.

FY 1986 plans called for greater use of management and planning tools such as the Harvard Total Project Manager software package. While used to define and enumerate specific tasks within each of the major functional areas, continued use of the software as a dynamic management tool was discarded due to its overly rigid and complex update features.

C.9.1.4 Facility Management

Operating both the DIHF Facility in Bethesda and the DIHF Annex in Rosslyn during FY 1986 facilitated a number of contract operations. By opening up the Annex, improved coordination of the acquisitions, microcomputer software development, training, and outreach efforts resulted.

This facility also provided a means to improve coordination between the AED, R&RS and PWA staffs by providing a Local Area Network between the buildings that improved communications and the use of available computing resources. Greater efficiencies through expansion of the LAN were not possible because of the restriction on facility modifications.

Work proceeded during FY 1986 to correct the damage done to the DIHF facility in Bethesda resulting from nearby construction. At times throughout the year, parts of the building were not available for full operations due to rehabilitative construction. By year's end, most of the major renovations had been completed with only minor interior work remaining. Efforts to make more efficient use of DIHF space through sub-leasing the basement and shifting more storage to the Gaithersburg warehouse did not come about.

C.9.2 FY 1987 Plans

C.9.2.1 Task Planning/Tracking

Efforts will continue during FY 1987 to use the Harvard Project Manager more effectively. A new version of the software was released during FY 1986 which has improved the updating and maintenance of task monitoring.

C.9.2.2 Reporting

Plans to continue to refine DIHF reporting and statistical compilation and analysis will be implemented. Refinements being considered are the use of H-P supplied software to provide improved analyses of HP3000 usage and reporting on ground/account usage to reflect the growing body of USAID users of the HP3000/MINISIS system.

C.9.2.3 Budget Controls

Recognizing the ever-growing need for tighter budget controls, efforts will continue to provide frequent cost analyses and projections regarding contract finances. It is not anticipated that the DIHF will be able to absorb as many unspecified activities in FY 1987 as it has in the past in light of projected funding reductions. Attention will concentrate on maintaining existing levels of performance or to eliminating activities found to be less than entirely essential to CDIE plans. Attention will also be given to introducing new procedures designed to be more productive and responsive that may warrant changes in existing operational procedures.

C.9.2.4 Quality Control

The assignment of an AID direct-hire as Quality Control Coordinator on site at DIHF facilities is seen as essential. An on-site AID staff person will provide a long-needed direct channel of communication to the AID/W offices with whom DIHF interacts.

In addition, she/he will provide immediate feedback and interpretation of CDIE and agency standards to DIHF products and services.

CHAPTER D: RESOURCE UTILIZATION

D.1 Personnel Resources

D.2 Financial Expenditures

D.3 Financial Projections

AID/DIHF PROGRESS REPORT FOR 1986
 * Output levels specified by AID's Statement of Work

A. ACQUISITION REPORTS	*YEAR/MONTH	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. AID Document Activities													
a. PD Docs. Sent for Cataloging		205	204	174	362	142	161	171	176	198	279	146	214
b. PN Docs. Sent for Cataloging		205	122	205	199	194	222	144	166	155	193	157	177
c. Miscellaneous Docs. Processed		328	273	1	35	0	123	187	29	221	128	58	140
d. Duplicates		429	158	199	230	385	364	314	228	253	181	584	374
e. Total No. of Docs. Processed		1,167	757	579	826	721	870	816	599	827	781	945	905
2. Non-AID Document Activities													
a. Titles Ordered		16	15	20	12	22	15	24	22	21	52	20	9
b. Ordered FY 1986		16	31	51	63	85	100	124	146	167	219	239	248
c. Titles Received		14	15	21	19	10	9	23	28	8	19	32	28
d. Titles Rcvd FY 1986		14	29	50	69	79	88	111	139	147	166	198	226
e. Rcv'd 1985, 1986		653	668	689	708	718	727	750	778	786	805	837	865
f. Obligated Current Mo. (Est. Dollars)		3,921	2,532	1,075	1,387	1,652	2,588	6,462	5,424	3,826	3,676	2,081	1,524
g. Obligated FY to Date (Est. Dollars)		2,235	4,767	5,842	7,229	8,881	11,469	17,931	23,355	27,181	30,857	32,938	34,462
h. Spent Current Mo. (In Dollars)		357	4,475	8,386	5,379	8,027	1,444	3,739	2,342	2,275	15,473	2,605	11,052
i. Spent FY to Date (In Dollars)		357	4,832	13,218	18,597	26,624	28,068	31,807	34,149	36,424	51,897	54,502	65,554
j. FY86 Funds Not Obligated (Est. Dollars)		72,765	70,233	69,158	67,771	66,119	63,531	57,069	51,645	47,819	44,143	42,062	40,538
I. WAREHOUSE INVENTORY OF PRINTED DOCUMENTS													
1. New Titles Rcv'd (Not Recorded At This Time)													
2. Total Publs. Rcv'd " "													
3. Total Inventory Titles " "													
4. Total Inventory Publs. " "													
5. Titles Deleted (Not Recorded At This Time)													
J. PROCESSING REPORT													
1. Total Docs. in Que 14,659 14,956 13,906 13,814 13,322 12,197 9,947 9,797 9,422 8,822 8,297 8,297													
2. Total Added to Que 825 300 0 0 0 0 150 0 0 75 0 0													
3. Total Discarded From Que 0 0 92 492 0 0 0 0 225 0 0 0													
4. Total Processed From Que 528 1,050 0 0 1,125 2,250 300 375 600 0 0													
5. PD Docs. Processed 343 258 252 236 460 490 506 537 416 479 304 540													
a. Added to DOCUMENT 2,500/208 216 177 190 218 309 216 300 226 268 215 206 214													
b. Added to INV 127 81 62 18 151 274 206 311 148 264 98 326													
c. Added to Unproc. Que 825 225 0 0 0 150 0 0 75 0 0													
6. PN Docs. Processed 319 252 208 248 400 297 420 262 265 252 190 157													
a. Added to DOCUMENT 2,500/208 262 169 165 197 267 223 247 198 197 185 145 97													
b. Added to INV 57 83 43 51 133 74 173 64 68 67 45 60													
c. Added to Unproc. Que 0 75 0 0 0 0 0 0 0 0 0 0													
7. Total Docs. Proc. DOCUMENT 478 346 355 415 576 439 547 424 465 400 351 311													
8. Total Docs. Proc. INV 4,500/375 184 164 105 69 284 348 379 375 216 331 143 386													
9. Total Docs. Processed 662 510 460 484 860 787 926 799 681 731 494 697													
10. No. of Changes to DOCRD 381 996 553 331 292 630 359 288 418 179 514 259													
11. No. of Dupl. Found 530 785 36 358 726 365 300 147 209 444 104 77													
12. New Que Total 14,956 14,206 13,814 13,322 12,197 9,947 9,797 9,422 8,822 8,297 8,297 8,297													
13. Classified Database N/A N/A N/A N/A N/A N/A N/A N/A 277 306 177 449													

D. ABSTRACT INDEXING	*YEAR/MONTH	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Abstracts Added to DOCUMENT		91	122	119	135	141	152	189	165	130	80	133	125
a. DIHF Generated Abstracts		83	113	102	125	102	143	181	145	118	69	101	99
1. Project Documents		42	71	69	61	43	92	105	67	95	51	71	68
a. New 1984 Des. Docs.	200/17	8	18	22	8	6	7	21	13	26	16	17	28
b. Pre-1984 Des. Docs.	100/8	15	6	10	10	3	2	8	4	9	8	11	23
c. Evaluations		19	47	37	43	34	83	76	50	60	27	43	17
2. Amendments		6	5	8	11	8	9	10	11	18	3	2	9
3. Technical Documents		35	37	25	53	51	42	66	67	5	15	28	22
b. Edited Author-prep. Abs.		8	9	17	10	39	9	8	20	12	11	32	26
1. Project Documents		1	4	3	2	0	2	3	10	9	6	20	14
a. New 1984 Des. Docs.		1	4	3	2	0	2	3	7	6	5	15	13
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	3	3	1	5	1
2. Technical Documents		7	5	14	8	39	7	5	10	3	5	12	12
2. Abs. Added Only to PROJECTS		9	8	0	4	11	68	146	26	10	13	13	3
a. DIHF Generated Abs.		3	8	0	4	11	60	11	26	10	13	13	3
b. Edited Author-prep. Abs.		0	0	0	0	0	8	135	0	0	0	0	0
3. Total No. Abs. Added to DIS		100	130	119	139	152	220	335	191	140	93	146	128
a. DIHF Generated	1,500/125	92	121	102	129	113	203	192	171	128	82	114	102
b. Edited Author-prep. Abs.	100/8	8	9	17	10	39	17	143	20	12	11	32	26
4. Documents Indexed Only	4,300/358	265	457	456	357	262	438	454	547	275	303	306	547
a. Project Documents		153	248	312	178	29	85	167	126	142	170	130	421
b. Technical Documents		112	209	144	179	233	353	287	421	133	133	176	126
5. Documents Reindexed	500/42												
6. Proposed Thes. Changes	300/25	39	1	26	5	9	0	49	1	0	14	0	0

E. Data Base Statistics (Cumulative to Date)	*YEAR/MONTH	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. DOCUMENT		41,630	41,971	42,338	42,762	43,361	43,881	44,584	45,043	45,521	45,939	46,301	46,617
2. INVENTORY		10,526	10,695	10,800	10,872	11,162	11,512	11,896	12,273	12,492	12,828	12,972	13,360
3. SERIALS		1,070	1,074	1,078	1,080	1,080	1,095	1,103	1,108	1,119	1,119	1,119	1,119
4. PROJRD		7,052	7,059	7,064	7,077	7,085	7,093	7,436	7,446	7,455	7,464	7,473	7,496
5. CATALOG		1,234	1,259	1,297	1,355	1,410	1,434	1,487	1,524	1,590	1,683	1,708	1,713
6. INSTIT. AUTHORITY		4,493	4,523	4,545	4,591	4,620	4,647	4,701	4,765	4,806	4,842	4,858	4,883

F. CATALOGING	*YEAR/MONTH	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. OCLC		0	0	0	0	0	0	0	0	0	0	0	0
a. Non-AID		0	0	0	0	0	0	0	0	0	0	0	0
b. AID		0	0	0	0	0	0	0	0	0	0	0	0
2. CATALOG DB Processing													
a. Orders Cataloged		14	14	11	17	5	10	18	24	9	20	29	38
b. Backlog Processed (Total)		60	18	8	4	44	46	22	25	1	0	0	1
(1) Acceptances		7	17	8	4	27	23	20	23	1	0	0	1
(2) Rejections		53	1	0	0	17	23	2	2	0	0	0	0
c. Gifts Cataloged		5	6	2	48	28	12	2	19	47	40	9	4
d. Retrospective Cataloging		21	6	19	0	1	5	34	0	1	0	4	1
e. Total Cataloged	500/42	47	43	40	69	61	50	74	66	58	60	42	44
f. Total for Contract		552	595	635	704	765	815	889	955	1,013	1,073	1,115	1,159
3. Call Nos. Added to DOCRD		2	10	0	10	16	10	16	5	14	5	7	6

G. MAILING LIST MAINTENANCE	*YEAR/MONTH	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. ARDA Address Transactions													
a. Additions	300/Combined	2	2	0	9	0	47	0	0	2	1	8	1
b. Modifications	300/Combined	2	2	6	34	6	26	26	26	26	26	26	26
c. Deletions		0	6	0	18	0	0	0	13	4	2	3	8

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2. Total No. ARDA Recipients	7,359	7,355	7,355	7,346	7,346	7,393	7,393	7,380	7,378	7,377	7,382	7,375
3. Requests ARDA Labels												
a. Number of Requests	0	0	0	0	0	0	0	2	0	0	0	5
b. Total No. of Labels												
ARDA Distribution	7,500 Per Is.	0	0	0	0	0	0	14,820	0	0	0	13,400
4. Reqs. for (Non-ARDA) Subsets												
a. Number of Requests	0	1	0	0	3	7	3	5	4	15	3	0
b. Total No. of Labels	0	720	0	0	50	2,486	2,697	2,264	608	4,866	5,523	0
5. Reqs. for POP/Off Labels (J)												
a. Number of Requests	1	1	1	1	1	2	2	2	2	2	0	2
b. Total No. of Labels	64	63	63	65	84	65	65	65	65	65	0	65

H. PUBLICATIONS	*YEAR/MONTH	VOL.12:1	VOL.12:2	VOL.13:1	VOL.13:2								
1. ARDA													
a. No. of Docs. Abs.	600/150 Is.	150	150	150					90				
b. Essay review/approval		8/15/84	1/31/86	N/A									
c. Date to Printer		1/28/85	3/14/86	8/29/86									
d. Date From Printer		2/14/85	4/21/86										
e. Date Mailed				9/31/86									
f. No. of Printed Copies	7,500 Per Is.	7,000	7,200	7,513									
2. Special Bibliographies		OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
a. No. of Bibl. Issued	6/	0	0	0	1	0	0	1	0	1	0	0	0
b. No. of Copies/Issue	1,000 Per Is.	0	0	0	3,500	0	0	600	0	1,100	0	0	0
3. Acquisitions Lists													
a. No. of Acq. Lists Distr.	12/	1	2	1	2	1	2	2	2	1	2	0	2
b. No. of Copies/Issue	3,000 Per Is.	200	300	300	700	350	800	300	500	350	483	0	600

I. FILMING REPORT	*YEAR/MONTH	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. No. Docs. Prepared for Filming		510	439	232	374	381	501	533	385	378	399	298	244
a. PD Docs. Sent to Filming		272	209	91	144	210	242	249	196	241	203	127	140
b. PN Docs. Sent to Filming		238	230	141	230	171	259	284	189	137	196	171	104
c. Total Frames Prepped		40,489	35,945	16,444	34,121	32,952	39,811	37,827	33,729	25,514	26,631	27,184	20,992
2. Total Docs. Filmed:	5,000/415	395	541	273	344	434	415	617	345	331	396	360	218
a. PD's:													
(1) Documents		268	219	90	167	210	199	289	196	193	192	158	134
(2) Total No. of Fiche		322	272	130	227	277	240	343	268	248	229	215	184
(3) Total No. of Frames		14,325	14,494	7,641	12,134	15,000	11,964	15,953	13,949	12,047	10,384	11,387	9,988
b. PN's:													
(1) Documents		127	322	183	177	224	216	328	149	138	204	202	84
(2) Total No. of Fiche		250	478	247	278	371	314	484	261	183	288	319	142
(3) Total No. of Frames		18,098	30,028	12,040	17,807	24,433	19,358	30,280	17,066	10,499	15,987	17,543	9,140
3. Dupl. Fiche Production:													
a. No. of Masters		572	750	377	505	648	554	827	529	431	517	534	326
b. Total PD Fiche Dupl.		1,610	1,360	650	1,135	1,385	1,200	1,715	1,340	1,240	1,145	1,075	920
c. Total PN Fiche Dupl.		2,250	4,302	2,223	2,502	3,339	2,826	4,840	2,610	1,830	2,880	3,190	1,420
d. Total (PD&PN) Fiche Dupl. Monthly		3,860	5,662	2,873	3,637	4,724	4,026	6,555	3,950	3,070	4,025	4,265	2,340
4. Fiche Distribution													
a. Total (PN&PD) Filmed Since October 1984		51,265	56,927	59,800	63,437	68,161	72,187	78,742	82,692	85,762	89,787	94,052	96,392
b. Fiche Set Distribution	/14	14	14	14	14	14	14	15	15	15	15	15	15

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PD - DAT tributed

a. No. of Documents	268	219	90	167	210	199	289	196	193	192	158	134
b. No. of Fiche	322	272	130	227	277	240	343	268	248	229	215	184
c. No. of Fiche Distr. (5 Sets)	1,610	1,360	650	1,135	1,385	1,200	1,715	1,340	1,240	1,145	1,075	920
d. No. of Fiche FY 1986	1,610	2,970	3,620	4,755	6,140	7,340	9,055	10,395	11,635	12,780	13,855	14,775

Distribution

AID (SA-18/105)	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30
AID (SA-18/209) 2 copies	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30
AID (NS/3659)	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30
DIHF	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30

PN - Date Distributed

a. No. of Documents	127	322	183	177	224	216	328	149	138	204	202	84
b. No. of Fiche	250	478	247	278	371	314	484	261	183	288	319	142
c. No. of Fiche Distr. (10 Sets)	2,250	4,302	2,223	2,502	3,339	2,826	4,840	2,610	1,830	2,880	3,190	1,420
d. No. of Fiche FY 1986	2,250	6,552	8,775	11,277	14,616	17,442	22,282	24,892	26,722	29,602	32,792	34,212

Distribution

AID (SA-18/105)	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30
AID (SA-18/209)	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30
Costa Rica	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30
Jakarta	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30
Cairo	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30
Zaire	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30
World Bank	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30
Peace Corps.							4/30	5/31	6/30	7/31	8/31	9/30
DIHF	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30
IDRC	10/31	11/30	12/30	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30

5. DataBase Exchanges

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

6. Index Distribution

World Bank	1	0	0	1	0	0	1	0	0	1	0	0
Peace Corps.	1	0	0	1	0	0	1	0	0	1	0	0
Costa Rica	1	0	0	1	0	0	1	0	0	1	0	0
Jakarta	1	0	0	1	0	0	1	0	0	1	0	0
Cairo	1	0	0	1	0	0	1	0	0	1	0	0
Zaire	1	0	0	1	0	0	1	0	0	1	0	0
Peace Corps.	0	0	0	0	0	0	1	0	0	1	0	0
Library of Congress	0	0	0	0	0	0	1	0	0	1	0	0
Haiti	0	0	0	0	0	0	0	0	0	0	0	1
India	0	0	0	0	0	0	0	0	0	0	0	1
Panama	0	0	0	0	0	0	0	0	0	0	0	1

7. Other AID Geographic Support Activities

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Science Advisor Documents												
Fiche												
Frame												
AID/PEST (X25) Documents												
Fiche												
Frame												
AID/Philippines (X1) Documents												
Fiche												
Frame												

8. Filming Grand Totals:

a. Monthly Production

(1) Documents	395	541	273	344	434	415	617	345	331	396	360	218
(2) Masters	572	750	377	505	648	554	827	529	431	517	534	326
(3) Frames	32,423	44,522	19,681	29,941	39,433	31,322	46,233	31,015	22,546	26,371	28,930	19,128
(4) Diazos	3,860	5,662	2,873	3,637	4,724	4,026	6,555	3,950	3,070	4,025	4,265	2,340

b. FY 1985, 1986 Production

(1) Documents	4,839	5,380	5,653	5,997	6,431	6,846	7,463	7,808	8,139	8,535	8,895	9,113
(2) Masters	7,170	7,920	8,297	8,802	9,450	10,004	10,831	11,360	11,791	12,308	12,842	13,168
(3) Frames	413,128	457,650	477,331	507,272	546,705	578,027	624,260	655,275	677,821	704,192	733,122	752,250
(4) Diazos	55,424	61,086	63,959	67,596	72,320	76,346	82,901	86,851	89,921	93,946	98,211	100,551

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)	719	1,519	1,735	1,348	1,235	1,069	2,312	1,308	1,459	1,417	1,413	1,337
b. Priority II (3 Days)	333	125	369	549	564	27	407	593	180	63	442	340
c. Priority III (7 Days)	952	257	772	533	164	329	174	780	939	582	644	203
2. Type of Copy Requested												
a. Fiche (diazos copies)	66	124	55	97	109	149	218	97	191	249	147	173
b. Paper Blowbacks	753	729	871	1,532	1,125	841	1,530	1,633	1,788	830	1,617	836
c. Paper Copy in Stock	1,185	1,048	1,943	913	858	3,493	2,146	11,125	930	1,623	1,864	8,767

K. PRODUCTION THROUGHPUT (AVERAGE TIME PER DOC.)

1. A.I.D. Document Cataloging (Days)	13	11	12	10	14	10	9	7	4	7	8	6
2. Core Filming (Days)	11	8	9	7	16	6	10	8	5	9	8	8
3. Abstracting/Indexing/Editing (Days)	163	181	139	174	167	111	99	78	82	68	75	103
4. Indexing of Index-Only Docs. (Days)	82	43	59	43	115	55	35	17	24	23	21	21
5. User Services												

(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	12	12	12	12	12	12	12	12	12	12	12	12
3. CPU Usage (All Groups)												
a. No. of Sessions	4,568	5,643	3,140	4,380	3,538	4,214	4,585	4,088	3,790	4,137	3,397	4,124
b. Total CPU Hours	320	374	242	324	271	226	309	296	264	419	269	263
c. Total Logon Hours	5,417	6,622	3,075	4,525	4,454	5,053	5,896	5,015	5,014	5,464	5,456	5,043
4. Printer Usage												
a. No. of Print Sessions	2,873	3,184	1,680	2,264	1,871	2,659	3,154	2,195	2,072	2,544	1,920	2,562
b. Total Lines Printed	1.7mil	1.9mil	1.0mil	1.2mil	0.9mil	1.3mil	1.6mil	1.5mil	1.1mil	1.2mil	1.0mil	1.2mil
c. Total Sectors Used	626,476	659,728	361,580	464,796	385,868	500,032	624,820	714,708	456,512	580,132	412,096	513,572

BEST AVAILABLE COPY

AID/DINF Financial Report - August 1985

	PHASE I	PROGRAM ACCT ACTIVITIES			PHASE III	CUM TOTAL
		PHASE II				
		CORE	FARM SYS BIB	POP OFFICE		
CURRENT AUTH CEILING	\$75,737.00	\$7,681,051.00	\$46,200.00	\$120,200.00	\$716,681.00	\$8,539,469.00
CURRENT AUTH BUDGET	\$75,737.00	\$1,657,248.00	\$46,000.00	\$20,000.00	\$114,015.00	\$1,933,000.00
AMOUNT SPENT PREVIOUSLY	\$32,001.93	\$1,267,879.49	\$24,000.71	\$9,203.70	\$22,525.62	\$1,356,499.45
CURRENT MONTH EXPENDITURES:						
LTS -						
Direct Labor Hours	56	2222.5	95		51	2434.5
Direct Labor/Overhead(\$)	\$2,580.91	\$35,563.86	\$1,519.33		\$1,490.14	\$41,162.24
Other Direct Costs:						
Computers:						
Equipment/Maintenance		\$15,511.01				\$15,511.01
Supplies/Services		\$435.43				\$435.43
Consultants						
Gen Off Equip/Supp/Grvcs		\$9,090.79				\$9,090.79
Loc Trvl/Pkng/Msgr Srvc		\$2,474.53				\$2,474.53
Long Dist Trvl/Per Diem						
Micrographics:						
Filing (vendor costs)		\$2,431.30				\$2,431.30
Equipment/Maint		\$417.53				\$417.53
Supplies/Services		\$352.97				\$352.97
Post./Frgh/Mail Srvc		\$210.75				\$210.75
Printing/Photocopy		\$3,255.00				\$3,255.00
Pubs/Subscriptions						
Space Rental/Utilities						
Telephone		\$6,543.77				\$6,543.77
Temp Services						
Total LTS Direct Costs	\$2,580.91	\$76,286.96	\$1,519.33	\$0.00	\$1,490.14	\$81,005.34
Subcontractors:						
CAP SYS GROUP, INC:						
Labor Hours	120	1381.75	4	333	44	1882.75
Labor/Overhead(\$)	\$1,587.00	\$17,024.64	\$50.00	\$3,254.00	\$007.72	\$22,731.36
ODCs:						
Local Trvl/Pkng		\$390.39				\$390.39
Lg Dist Trvl/Conf/Mtg						
Supplies/Pubs		\$172.60				\$172.60
Graphics/Reproduction		\$19.90				\$19.90
Temp Serv/Consultants		\$513.00				\$513.00
Total Direct Costs	\$1,587.00	\$18,120.61	\$50.00	\$3,254.00	\$007.72	\$23,833.33
SGA+Fee	\$253.31	\$2,910.31	\$9.34	\$323.09	\$130.04	\$3,837.29
Total CSB Costs	\$1,840.31	\$21,047.12	\$67.34	\$3,777.09	\$937.76	\$27,572.62
COM DATA SYS, INC:						
Labor Hours		1242.5				1242.5
Labor/Overhead(\$)		\$19,670.01				\$19,670.01
ODCs:						
Local Trvl/Msgr		\$171.60				\$171.60
Long Dis Trvl/PD						
Temp/Misc Labor/Conslt		\$10.00				\$10.00
Reproduction		\$4,454.77				\$4,454.77
Space Rental/Util		\$0,096.56				\$0,096.56
Storage/Warehouse		\$531.50				\$531.50
Computer: Equip/Maint		\$1,001.90				\$1,001.90
Computer: Supp/Grvcs		\$1,045.79				\$1,045.79
Printing/Photocopy/Misc		\$45.18				\$45.18
Post/Freight/Mail/Tele		\$1,592.06				\$1,592.06
Total Direct Costs	\$0.00	\$37,429.05	\$0.00	\$0.00	\$0.00	\$37,429.05
SGA+Fee	\$0.00	\$6,632.43	\$0.00	\$0.00	\$0.00	\$6,632.43
Total COSI Costs	\$0.00	\$44,061.48	\$0.00	\$0.00	\$0.00	\$44,061.48
TOTAL DL, OH, & ODC	\$4,422.42	\$141,395.55	\$1,526.67	\$3,777.09	\$2,435.90	\$153,619.43
SGA	\$454.46	\$14,946.53	\$166.60	\$336.68	\$255.77	\$16,139.24
FEF (On Subs)	\$110.55	\$3,906.52	\$4.24	\$226.67	\$56.27	\$4,204.25
FEF (Less Subs)	\$274.30	\$8,202.01	\$151.73	\$35.70	\$157.85	\$8,821.58
TOTAL AMOUNT FOR MONTH	\$5,272.51	\$168,350.62	\$1,709.04	\$4,436.95	\$2,905.79	\$192,374.90
LESS \$ RCVD IN PYMTS						
		\$4,654.41				\$4,654.41
ADJ TOTAL AMT FOR MONTH		\$163,696.21				\$179,329.49
TOTAL CUM AMOUNT TO DATE	\$37,354.44	\$1,431,575.72	\$26,717.75	\$13,540.65	\$25,431.41	\$1,524,713.54
AMT REMAINING IN BUDGET	\$38,382.56	\$255,672.30	\$19,282.25	\$6,359.35	\$88,583.59	\$418,290.25
PROJ MONTHLY EXP (4 mos)	\$9,595.64	\$66,419.38	\$4,820.56	\$1,589.84	\$22,145.90	\$124,570.22

NI. Functional Breakout of Staff Hours by Month/Yr (August 1985)

Company/Employee	Phase I	Mgmt/Adm Qual/Resur	Acc's	Proc/Cat	Sys Dev	R/I	Thesaurus	Micro- fiche	User Serv	POP	Publ: ARDA/ Bibs	FSRB	Outreach	Training	Phase III	Total
LTS																
Biers	8	85														93
Bloomberg	18	6														16
Booth	48	79													28	155
Bohall, B.					167											167
Brilhart				123												123
Catterton				94												94
Crowe					181										3	184
Ferraro						76.5						21.5				98
Gore						39						6				45
Howard, P.					88											88
Inholtz							117.5					11				128.5
Jones						68										68
McDonald											68	2	84.5		28	166.5
Moore				126												126
Pinches						152						11				163
Shockey		38		68		48						18				148
Vadas		168														168
Welscher						154						33.5				187.5
Wilson, B.			168													168
Woodberry		136														136
Total LTS	66	512	168	483	348	529.5	117.5	0	0	0	68	95	84.5	0	51	2434.5
CSBI																
Brock									1							1
Combs		44														44
Dacy		88	48						48							168
David									2							2
Fowler		21														21
Higgs									16							16
Howan									32							32
Morgan					138											138
Nelso									2							2
Nissman					136											136
Parlor									16							16
Urie					138											138
Wardell					174											174
Washington									18.5							18.5
Wiles		176														176
Young					176											176
Total CSBI	0	329	48	0	754	0	0	0	119.5	0	0	0	0	0	0	1242.5
CSB																
Byrne															4	4
Carber				32												32
Clift	48		136													176
Cornwall				64												64
Downes	88		36										36		24	176
Harris								88								88
Heyden								3								3
Holland								181								181
Howard, L.									65	111						176
Jones								137								137
King								188								188
Klish, A.									96							96
Klish, M.									98							98
Miller									81	111						192
Morgan				184								4				188
Rielly		7.75														7.75
Swistak									65	111						176
Vandrent		116											16		16	148
Total CSB	128	123.75	172	208	0	0	0	429	485	333	0	4	52	0	44	1882.75
Monthly Cumulative																
October 84	292	649	88	876	661	941	73	562	591	0		45			65	4987
November 84	186	534	66	276	352	741	188	475	574	0	32	31			48	3477
December 84	54	688	83	824	464	662	135	558	587	0	29	29			46	4229
January 85	48	638	76	1838	515	823	134	439	562	0	32	35	136	176	31	4667
February 85	287	482	37	828	568.5	721	186.5	294	532	0	14	29	148	128	35	4884
March 85	45	594	68	968	784.5	753.5	155.5	347	573.2	0	15	51.75	168	142	18	4783.45
April 85	48	541	68	965	648	738	157.5	476	556	0		73	228	88	39	4693.5
May 85	19	761	198	972	878.5	588.5	149.5	585.5	798.8	0		69.5	248	18	31.5	5385.8
June 85	38	644	168	849.5	925	688.5	115	567	678.2	0	58	22	127	15		4893.2
July 85	89	869.5	428	948	927	642.5	148.5	479	974	0	48	115.5	124		73	5858
August 85	186	964.75	388	683	1182	529.5	117.5	429	524.5	333	68	99	136.5	0	95	5559.75
September 85																
YTD Cum.	1116	7197.25	1694	9131.5	7889.5	7984.5	1384	5141.5	7154.7	333	382	599.75	1315.5	958	488.5	52529.7