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**Overseas
Development
Information
Support:**

**An Agenda
For Action**

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Russell H. Betts
Jerry VanSant

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Development Alternatives, Inc. 624 Ninth Street, N.W. Washington, D.C. 20001

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EXECUTIVE SUMMARY**INTRODUCTION**

The U.S. Agency for International Development faces a difficult but vital task in putting to work the information that is available to promote economic and social change and development. Information is a critical resource for economic growth and for social, or human resources, betterment, two key elements in the broad development process. Indeed, information resources are as important to the development process as any material or human resources that may be employed. This is particularly true when uncertainty is a prime characteristic of the task at hand. To overcome the enormous difficulty of making things happen requires that the existence and availability of these resources be acknowledged and understood. This, in turn, requires both appropriate information and users of that information with an openness to learning. Information supply without demand is a wasted resource. Information demand without supply is a wasted opportunity.

For AID, the sheer quantity of available information is an ironic impediment to that information's effective management and use. As noted recently by W. Haven North, Associate Assistant Administrator, Center for Development Information and Evaluation (CDIE), project designs are prepared, technologies are employed, and implementation methods are used that do not reflect AID experience with what works and with what does not work. Thus, unsound projects are perpetuated (or even repeated) and opportunities for responsible innovation are missed. A lack of knowledge on the part of responsible staff, as a result of an inability or unwillingness to make appropriate use of relevant information, is frequently the cause of these unnecessary and costly project failures.

Effective development planning and implementation require an informed awareness of the policy environment, combined with a sensitive and detailed knowledge of local conditions, practices, and needs. The role of information in creating this awareness and knowledge includes:

- Developing the knowledge to understand the results of past initiatives and to clarify development issues;
- Providing decision makers with an understanding of the options available to them and the likely impact of alternative strategies;
- Building consensus among those who must implement change;
- Identifying and overcoming development constraints; and

- Increasing the capability of those persons or organizations that must carry out solutions.

For effective management of development programs, information is needed before program implementation, when policy options are considered and formulated, and while planning is taking place; during program implementation, to facilitate that implementation at various levels and in different offices and agencies; and after implementation, when data are needed to evaluate program results in light of stated objectives and for feedback of information into the planning process.

AID has made a substantial investment in its effort over recent years to capture and maintain development experience information. This institutional memory represents a resource of major importance, incorporating lessons learned from a wide range of development activities designed and implemented by the AID, as well as relevant technical and analytic information from non-AID sources. Improving the effective use of this information, in part through its exchange between AID/Washington, USAID missions overseas, and selected counterpart institutions in developing countries is of central importance to AID in the continuing fulfillment of its development support mandate.

To assist it in formulating policies and guidelines relating to more effective information outreach to USAID missions and developing country counterpart institutions, the Development Information (DI) Division of CDIE within the Bureau for Program and Policy Coordination (PPC) in late 1984 commissioned the design of a strategy for implementing an Overseas Development Information Support (ODIS) Project. The initial report of that design task ("A Strategy Paper for the Overseas Development Information Support Project," Development Alternatives, Inc., January 1985) examined potentials for and constraints to more effective use of relevant development information by USAID staff and host-country counterparts.

Several major points were emphasized in the proposed ODIS strategy:

- To be responsive to existing mandates that it make effective use of the knowledge gleaned from its own prior experience, AID must distinguish between developing an information base of AID-related material and the broader task of supporting, in a diverse set of overseas situations, the effective dissemination, management, and use of appropriate development information. The focus of the ODIS project should be on the latter mandate.

- Developing site-specific local information resources (or the capacity to obtain them) represents the major contribution that AID can make to effective use of its institutional memory in project design and management. Effective use of information overseas depends on the ability to identify and obtain needed materials in timely fashion through a variety of development resource channels.
- Therefore, an ODIS project should not have the objective of transferring the archived institutional memory of AID to overseas sites, except selectively in response to expressions of justifiable need by missions and after appropriate information management capabilities have been established. Instead, project activities should focus on enhancing site-specific capacities to access, manage, and use appropriate development information more effectively (in part through effective interaction with CDIE resources in AID/Washington), and on increasing use by USAID missions of the development information resources currently or potentially available to them.

TASK ORDER FINDINGS

To test and evaluate further the assumptions and recommendations contained in the strategy paper, a follow-up pilot project was planned and implemented to examine through limited testing at a USAID mission (Haiti) the operational implications of the proposed strategy, and to set in motion selected activities critical to broader understanding and implementation of that strategy. Findings from several other USAID missions were obtained by the study team and CDIE staff travel during the life of the pilot project.

Several points emerged from a review of development information management in USAID missions:

- AID has no clear policy concerning development information management and no framework within which missions can develop policies for information needs, management, and use;
- Management decisions are needed from top levels of mission leadership that information is important, particularly the feedback link between evaluation and design (or redesign); and

- Information content is the key issue, that is, how does information contribute to learning at the mission level. This is particularly important in an environment of decentralization where decision responsibility in the field is greatly increased, and where a reduction in staff levels is perceived as requiring fewer AID professionals to do more with less, in a real-time environment. This situation allows little time to anticipate needs, screen larger volumes of information for relevant materials, or reflect on the information once it has been identified and is available.
- Information timeliness is another key issue. If information is not available when it is needed, it will not be used. Delays in delivery of information to USAID missions, even when that information had been requested on a priority basis, was cited as a reason for low second-time use of DI services in the field. This observation has implications both for timely delivery of requested information and for more anticipatory information dissemination on a proactive basis.

Additional findings regarding mission-level information management include:

- No USAID mission observed during task order implementation had a planned, organized strategy to ensure that appropriate information influenced project design or implementation;
- To the extent that individual project officers effectively used information, it was usually through informal networks. The services of CDIE were often overlooked;
- In general, although exposure to the services of CDIE has increased, use of CDIE resources remains limited. When stimulated and facilitated by a temporary duty visit, however, mission personnel in several places responded to CDIE marketing and produced a significant number of requests for information or information-related technical assistance. At these times, there also was a demonstrable tendency for missions to use this personal visit to consider structural or procedural changes concerning the improved use of mission information; and
- Mission libraries or their equivalents where they exist, typically are out of the mainstream of mission activities. The person in charge of these facilities is often not included in program discussions and does not see relevant cable or document traffic. As a result of these and related factors, libraries are often poorly used by mission personnel and are not responsive to mission programming needs.

The key resources for any mission director are people, money, and information. Task order inquiries to date suggest, however, that many mission directors display considerably more recognition of the importance of the first two resources than of the key role of information. Only by creating demand for information as a critical development resource will effective support be given to the necessary mechanisms to ensure good information content and flow. Thus, CDIE must address issues of both supply and demand if it is to be a significant factor in the mission information management equation.

OBSERVATIONS AND RECOMMENDATIONS

ODIS Program Priorities

- The primary focus during at least the inaugural two or three years of any ODIS project should be on the upgrading of the internal capacities of AID to promote more effective use of available development information resources in the support of its larger mandate. Although programmatic outreach to developing country institutions remains an important goal that should be pursued as circumstances warrant, the challenges within AID itself are sufficiently great that these activities should not be allowed to divert the ODIS project from its important first priority.

Upgrading Mission Information Brokerage

- The mission-level development information brokerage function is distinct from, and must be conceptually separated from, traditional library functions. Information brokerage means links to appropriate information networks and an orientation toward the marketing and timely delivery of relevant information to those who need it. This is the basic concept that must undergird any ODIS project implementation.
- Key mission-level clients for information support are those staff responsible for strategy and program development. In addition to the mission director, these staff usually include the mission economist, project development officer, evaluation officer, and others in the program office or its equivalent. ODIS project implementation should be geared to the interests and needs of these people.

- Improving the management and use of mission development information will normally require a staff person specifically charged with the information brokerage function. This person should be supervised by a program or other officer with project development responsibilities. In some instances, this officer might personally fill the information brokerage function.
- Where mission conditions warrant, local information collections should be developed that are geared to specific mission strategic and project priorities. A dedicated microcomputer with bibliographic index software such as MicroDIS has the potential to be a space-saving and cost-effective tool for local collection management.

Outreach

- The ODIS project should have a fundamental orientation toward user services -- technical assistance, reference, research, and outreach -- geared to a recognition of the needs of various information users. And potential users should be prioritized, to ensure appropriate project focus.
- ODIS and, subsequently, DIC staffs will need to launch an effort to inform mission personnel of the products and services that can be made available through CDIE and ODIS.
- DIC staff need access to key mission personnel, important planning documents, and relevant mission communications to fulfill outreach functions effectively at the local level.
- Outreach in the mission context requires proactive DIC leadership that will anticipate the information needs of program and project staff, and use a variety of AID and non-AID information sources to acquire what is needed in a timely fashion.

Training Section

- A human resource-centered approach to overseas information support places great importance on training and motivation, especially for staff responsible for managing the mission development information center (DIC). The training focus should be on outreach, networking, reference activities, and general user services.

- It is equally important that key mission personnel also are trained and motivated to make the most effective possible use of available information resources. This training should focus on user awareness, mechanisms to access information resources, and the value of information in improving the quality of AID's work.

CDIE Support to the Field

- Developing site-specific local information management capacity, combined with an enhanced mission awareness of the value of good information effectively used, represents the major contribution CDIE can make to good management and use of AID's institutional memory and other development information resources in field-level project design and implementation.
- Outreach in the CDIE context requires anticipation of mission needs through review of relevant program documents (including country development strategy statement, annual budget submission, and action plan) and participation in mission program review and other meetings, and then preparation of information packages geared to key potential users such as mission economists and project design and evaluation officers. Anticipatory preparation of generic materials of value to several missions pursuing similar program objectives (for example, design of fragile lands management projects) also can be useful.
- Key factors in CDIE support to USAID missions include technical assistance; responsive, timely, and high-quality document and research services; economic and social data and analysis; technology transfer; service promotion; and, in some areas, regional information management support.
- In the context of an ODIS focus on local information brokerage, CDIE assistance in data collection and analysis methodologies, supported by the development of economic and social databases by the Evaluation Applications and Statistical Analysis Division (EASA), should be designed to serve mission use of evaluation and other information for project development.
- CDIE should also strive to assist USAID missions indirectly through increased linkages with and direct support to other AID/Washington offices, especially the Bureau for Science and Technology and the Regional Bureau offices of Technical Resources and Development Planning.

Management Initiatives

- CDIE should anticipate a substantial increase in research requests as a result of ODIS initiatives. This will require increased DI staff or systems to establish priorities and ration responses. Mission DICs should play a role in filtering requests to ensure clarity and specificity and to reflect local priorities.
- A position classification scheme for mission DIC staff is needed that is appropriate to the requirements of information brokerage and outreach, rather than the library functions incorporated in Library of Congress and United States Information Service position classifications now used in most missions.
- Monitoring and evaluation criteria for ODIS activities should include the number of active DICs developed and sustained, the number of field requests for information, user evaluations of CDIE products, evidence of information use in mission project documents, and successful technology transfer.
- Priority should be given to preparation of a DIC procedures manual for USAID missions. This manual should be designed in a form that allows for customization for local circumstances and frequent modification.
- Arrangements should be made in the short term to enable follow-up on initiatives begun during ODIS pilot test work in Haiti, both to help consolidate progress already made and to enable more rigorous evaluation of impact than was possible during the pilot test time frame.

The ODIS Project

- Key factors in assessing the mission environment for development information acquisition and use include staff (and training), information resources, facilities, budget, mission support, available technologies (and capacity to use them), and access to local non-AID information resources.
- CDIE management and ODIS project staff will need to remain aware of the dual, and sometimes ambivalent, role that ODIS staff will be called on to play. This role is simultaneously entrepreneurial and advocatorial. ODIS project personnel will need to be salespersons for existing CDIE products and services to field missions, advocates of change in those products and services to make them more responsive to field needs.

IMPLICATIONS FOR IMPLEMENTATION

The implementation plan for an ODIS project should address the preceding recommendations. Major features include:

- The ODIS project should not be separated, either functionally or substantively, from the operations of PPC/CDIE/DI in order that ODIS functions ultimately be folded into ongoing AID operations as a self-sustaining and self-contained program. However, ODIS staff should be separate from the DI Research and Reference staff so that they will be able to serve as advocates for field needs and for changes in all CDIE services to make these services more responsive.
- The project should be implemented in three phases over a five-year period, using contracted services for that period. The project should be under the supervision of CDIE/DI and work in close cooperation with other related contracted services of that office (DIHF, Research and Reference staff, etc.).
- The ODIS project should not be implemented as if it were only a dissemination activity. Instead, it should focus its energies and resources on developing local capacities to acquire and manage information in USAID missions and counterpart institutions. In addition, an essential program component must be continuing efforts to ensure the best possible system responsiveness to existing and future development information needs. Thus, the ODIS project will be involved in efforts to improve the relevance and responsiveness of CDIE products and services, as well as to ensure effective use of the most appropriate technologies for information management and transfer.
- The larger context of ODIS implementation -- over which the project will have relatively little control -- will be critical to its success. Important issues include AID policy initiatives to legitimate effective use of the AID institutional memory, the ability of CDIE to respond to the expected large increase in field demand for its information services, and AID support for the continuing development and improvement of those services. Although control will reside outside the program, effective implementation of ODIS activities should have some impact on the evolution of relevant policies. Therefore, notwithstanding the degree to which these factors may lie beyond the direct control of the project, its success should be measured, in part, by the degree of positive change in these policies (and their implementation) during the life of the ODIS project.

CHAPTER ONE

INTRODUCTION

It is exquisitely difficult to make ordinary things work well. It is exponentially more difficult to make innovative things work at all in unstable environments, when the content and compass of the action cannot be reduced to technological means and consensually valued ends. It is cosmically difficult to make things work well when the visions are vastly separated from the ventures, by time, perspective, and understanding.

-- W. J. Siffin

The U.S. Agency for International Development faces a difficult but vital task in putting to work the information that is available to promote economic and social change and development. Information is a critical resource for economic growth and for the empowerment of people, two key elements in the development process. Indeed, information resources are as important to the development process as any material or human resources that may be employed. This is particularly true when uncertainty is a prime characteristic of the task at hand. To overcome the enormous difficulty of making things happen requires that the existence and availability of these resources be acknowledged and understood. This, in turn, requires appropriate information and users of that information with an openness to learning. Information supply without demand is a wasted resource. Information demand without supply is a wasted opportunity.

For AID, the sheer quantity of available information is an ironic impediment to that information's effective management and use. As noted recently by W. Haven North, Associate Assistant Administrator of AID's Center for Development Information and Evaluation (CDIE), project designs are prepared, technologies are employed, and implementation methods are used that do not reflect AID's experience with what works and with what does not work.

Thus, unsound projects are perpetuated (or even repeated), and opportunities for responsible innovation are missed. A lack of knowledge on the part of responsible staff, as a result of the inability or unwillingness to make appropriate use of relevant information, is frequently the cause of these unnecessary and costly project failures.

Effective development planning and implementation require an informed awareness of the policy environment, combined with a sensitive and detailed knowledge of local conditions, practices, and needs. The role of information in creating this awareness and knowledge includes:

- Developing the knowledge to understand the results of past initiatives and to clarify development issues;
- Providing decision makers with an understanding of the options available to them and the likely impact of alternative strategies;
- Building consensus among those who must implement change;
- Identifying and overcoming development constraints; and
- Increasing the capability of those persons or organizations that must carry out solutions.

For effective management of development programs, information is needed before program implementation, when policy options are considered and formulated, and while planning is taking place; during program implementation, to facilitate that implementation at various levels and in different offices and agencies; and after implementation, when data are needed to evaluate program results in light of stated objectives and to feed back information into the planning process.

CDIE'S ROLE IN AID INFORMATION MANAGEMENT

AID has made a substantial investment in its effort over recent years to capture and maintain development experience information. This institutional memory represents a resource of major importance, incorporating lessons learned from a wide range of development activities designed and implemented by the Agency as well as relevant technical and analytic information from non-AID sources. Improving the effective use of this information, in part through its exchange between AID/Washington, AID's overseas missions, and selected counterpart institutions in developing countries is of central importance to AID in the continuing fulfillment of its development support mandate.

This objective is incorporated in the goals of CDIE, which serves AID missions, regional and technical bureaus, and central AID management by:

- Promoting the application of lessons learned in program planning and management, policy formulation, and project development;
- Increasing AID staff awareness and use of development experience, and statistical and information resources; and
- Acting as overall manager of the AID evaluation system and as the central point for the development of evaluation guidance and other methodological materials.

Among the mandates of CDIE in fulfillment of these goals are:

- Improving the quality of AID's development experience information and intensifying its outreach, particularly to missions and developing country institutions;
- Increasing the use of CDIE statistical and data management resources by providing technical assistance in data collection and analysis methods; and

- Strengthening bureau and mission-level management of AID's evaluation and development information resource system.

Especially, to assist in formulating policies and guidelines relating to more effective CDIE outreach to overseas missions and counterpart institutions in developing countries, the Development Information (DI) Division of CDIE, Bureau for Program and Policy Coordination (PPC), in late 1984 commissioned the design of a strategy for implementing an Overseas Development Information Support (ODIS) Project. The initial report of that design task ("A Strategy Paper for the Overseas Development Information Support Project," Development Alternatives, Inc., January 1985) examined potentials for and constraints to more effective use of relevant development information by USAID staff and host-country counterparts. It also recommended a set of activities designed to use AID's institutional memory and other relevant development information resources to improve USAID mission capacities to design, manage, and evaluate projects and to provide information management support to host country counterpart institutions.

SUMMARY OF STRATEGY PROPOSALS

Several major points were emphasized in the proposed ODIS strategy. These include the following:

- To be responsive to existing mandates that AID make effective use of the knowledge gleaned from its own prior experience, the Agency must distinguish between developing an information base of AID-related material and the broader task of supporting, in a diverse set of overseas situations, the effective dissemination, management, and use of appropriate development information. The focus of the ODIS project should be on the latter mandate.

- Developing site-specific local information resources (or the capacity to obtain them) represents the major contribution that AID can make to the effective use of its institutional memory in project design and management. Effective use of information in the field depends on the ability to identify and obtain needed materials in timely fashion through a variety of development resource channels.
- Therefore, an ODIS project should not have the objective of transferring the archived institutional memory of AID to overseas sites except selectively, in response to expressions of justifiable need by missions and after appropriate information management capabilities have been established. Instead, project activities should focus on enhancing site-specific capacities to access, manage, and use appropriate development information more effectively (in part through effective interaction with CDIE resources in AID/Washington), and on increasing USAID mission use of the development information resources currently or potentially available to them.

Based on these assumptions, the proposed ODIS strategy emphasized the role of USAID missions in information management and of appropriate units within AID/Washington in providing relevant support, assistance, and response to mission needs. The strategy had three major elements:

- Orientation toward user services -- that is, reference, research, and outreach -- geared to a recognition of the diverse needs of various information users. Examples of these needs include:
 - Determination of whether comparable projects have succeeded, languished, or failed, and why,
 - Help for developing analytic methodologies, especially evaluation,
 - Improved awareness of relevant scientific and technical advances, and
 - Development of improved implementation and problem-solving strategies;
- Emphasis on effective collection, cataloging, indexing, dissemination, and use of locally relevant materials; and

- Provision of automated, easy-to-use index access to a broad range of development information and materials from AID sources, as well as other relevant development or technical information data bases, plus appropriate capabilities to transmit selected materials to sites requesting them.

Within this context, the ODIS strategy paper suggested that the primary support roles of relevant AID/Washington units, exercised largely through PPC/CDIE/DI, should include:

- Responding quickly and appropriately to field requests for processed information or documents;
- Broadening the range of bibliographic index content accessible through both PPC/CDIE and field mission computers;
- Providing technical assistance to information management initiatives in missions and, by extension, to host country counterparts through appropriate mission development assistance programs; and
- Developing or adapting improved technologies for automated information access and management in the field.

Based on these guidelines, the strategy paper recommended an implementation plan for a five-year ODIS project managed from within CDIE/DI to improve the exchange of development-related information between AID/Washington, USAID missions, and selected counterpart institutions in developing countries.

PURPOSE AND BOUNDARIES OF THIS TASK ORDER

To test and evaluate further the assumptions and recommendations contained in the strategy paper summarized above, a follow-up pilot project was planned and implemented to examine through limited testing at USAID mission (Haiti), the operational implications of the proposed strategy and to set in motion selected activities critical to broader understanding and implementation

of that strategy. This report assesses the results of those and modest subsequent initiatives (to be outlined below), and suggests additional key elements required for long-term implementation of the ODIS project.

To fulfill this objective, the task order plan was divided into three phases:

- USAID field mission profile and needs assessment;
- USAID field mission support initiatives; and
- Testing, assessing, and evaluating of material, systems, services, and guidelines supplied to the mission through the pilot activities.

Issues of support to host-country institutions were not addressed in the second task order except as a by-product of work with the mission. In addition, although the initial strategy report defined certain broad policy issues related to information use within AID, the focus of this pilot project was on more micro-level concerns of improving information support to the field. This does not lessen the need for or importance of a clear AID policy statement that establishes the parameters of AID's interest in effective information use and the role of AID's development information system as a management resource. The field inquiries under this task order suggested a range of refinements to the original strategy report recommendations, and these are summarized in this report. In particular, there is a need for clear incentives that promote the demonstrated use of lessons learned in program and policy development, design, and approval processes both in AID/Washington and the field.

Certain modifications were made in the task order plan during the course of its implementation. Of these, the most important was to incorporate limited information needs assessments of USAID missions other than Haiti in order to consider

different scenarios for potential AID/Washington information support. To this end, members of the study team visited USAID missions in the Dominican Republic, Indonesia, the Philippines, and Thailand. The experience of several CDIE staff during temporary duty (TDY) at USAID missions in Egypt, Honduras, Barbados, and at REDSO/West Africa also was incorporated through review of their field reports and through a workshop that was conducted to discuss findings and their implications for AID/Washington support options.

CHAPTER TWO

TASK ORDER ACTIVITIES

Major activities conducted in the course of the task order are reviewed below. Because this sequence of activities was based on the strategies developed in the original study, they are important as a prototype for the kind of support initiatives that an ODIS project could implement more widely in USAID missions.

FIELD MISSION PROFILE AND NEEDS ASSESSMENT

Prior to the first Haiti field trip, the study team reviewed USAID/Haiti program documents to prepare a preliminary country program profile (see Annex 2). Documents used for this purpose included the FY 1986 Country Development Strategy Statement (CDSS), Annual Budget Submission (ABS), and Congressional Presentation as well as the more recent FY 1986-87 mission Action Plan. Focus was placed on new or emerging programs and projects in priority areas. Based on the program profile, an outline of specific potential information support categories was developed, and a set of sample information products available through the services of DI was prepared. The primary purpose of this exercise was to test the extent to which it might be possible, from AID/Washington, to develop an accurate country profile as the basis for anticipating high-priority country-specific information needs.

During the eight-day visit to the Haiti mission, the study team checked the validity of the tentative program profile and obtained reactions to the sample information sets to determine preferences for information product type and packaging. In addition, the study team explored in depth with mission staff issues such as the:

- Availability and use of mission information;
- Level of mission support and resources available for development information management and dissemination; and
- Particular information needs and service requirements of mission staff that could be served by the research, reference, and database resources of AID/Washington, and in particular, CDIE/DI.

In the course of the field work, a particular focus evolved on augmenting the role of the existing mission "library" and its manager into a more proactive and outreach-oriented information resource for the mission and the Haitian development community. The findings that led to this focus are discussed in later sections of this report.

FIELD MISSION INFORMATION SUPPORT INITIATIVES

In response to the findings of the needs assessment at USAID/Haiti, a series of information management initiatives was set in motion to facilitate the improved availability and use of development information. These initiatives centered on transformation of the existing mission library into a development information center (DIC), capable of effectively supporting mission information needs. Specific recommendations to USAID/Haiti included:

- Establishing the DIC as a central service point within the mission for DI and other AID and many non-AID information products and services, and upgrading of the DIC director to play a proactive information brokerage role between USAID/Haiti and the information resources of AID/Washington;
- Enlarging the role of the mission executive officer (administratively responsible for the DIC in USAID/Haiti) in providing direction and supervision to DIC staff and in representing information management needs and interests to mission management;

- Involving DIC staff in program awareness activities to enhance staff responsiveness to mission needs. Suggested activities included the inclusion of DIC staff in project status review and other program-related meetings and the integration of DIC staff into the flow and reports or cables regarding project and evaluation schedules or other studies to be performed;
- Initiating a variety of outreach activities from the DIC, including promotion of awareness of DIC products and services; orientation services for new direct-hire staff, contractors, and other personnel arriving at the mission for program-related functions; and targeted circulation of new reports and publications to specific mission divisions or staff;
- Motivating the DIC director to begin creating an awareness of, and therefore demand for, relevant development information products and services among mission personnel.
- Upgrading the shelf collection in the DIC including deselection of irrelevant or inappropriate materials combined with more active acquisition of needed materials from AID and from other in-country donors; and
- Establishing a DIC budget to support such initiatives as staff augmentation and training, collection upgrading, and eventual acquisition of appropriate information technologies such as a microcomputer.

COMPLEMENTARY CDIE ACTIVITIES

In conjunction with the USAID/Hait pilot project, several important activities of CDIE continued in a supporting vein. These activities, which were closely integrated with task order implementation, included:

- Providing a week of on-site training in information management and library operations for the DIC director. This training was designed as an opportunity to develop an action plan and budget for the first year's operation of the DIC. A report of the training TDY is contained in Annex 3, and the DIC Action Plan is in Annex 4;

- Developing the MicroDIS software program for micro-computer-based access to bibliographic information; (Although not available for full implementation in Haiti during this pilot test, the software was demonstrated and evaluated to show mission staff the potentials of this technology for enhancing field access to both bibliographic information and textual material;
- Processing responses to the more than 25 specific information requests that were received from mission staff as a direct result of ODIS pilot project activities; see Annex 5 for a list of these requests;
- Preparing other information products for the mission, based on the program profile and information gained during the first field visit. These included a 48-page booklet providing general background information and Haiti-specific examples of CDIE products, resources, and services, as well as a variety of more detailed printouts of subject-specific database searches.
- Preparing and demonstrating by CDIE and the Evaluation Applications and Statistical Analysis Division (EASA) various microcomputer-readable economic and social database products for Haiti;
- Preparing a comprehensive CDIE capabilities and services summary as a tool to inform mission staff of available information resources from this source;
- Beginning the preparation of a DIC manual, including such content as suggested job descriptions for DIC staff, outreach strategies, collection management techniques, and available information resources; and
- Sending a letter from CDIE to all USAID missions requesting comment on major elements of the original ODIS strategy paper. Several responses had been received as of this writing, and comments are incorporated into the report. The dominant themes of mission responses were the need for technical assistance in various aspects of information management capability and for timely response to mission-level information requests.

None of these supportive CDIE activities is new or unique to this task order. Most are ongoing CDIE functions. However, the ODIS pilot project provided an opportunity to focus the range of CDIE support resources on a particular mission in a coordinated manner.

TEMPORARY DUTY WORKSHOP

As part of the task order scope of work, a workshop was held for CDIE personnel who had taken recent TDY field trips to USAID missions to perform needs assessments or market CDIE services. The purpose of the workshop was to explore how differing scenarios of information acquisition, management, and use in USAID missions relate to appropriate AID/Washington support options.

Reports of visits to Honduras, REDSO/West Africa, Egypt, Barbados, and the Dominican Republic as well as Haiti were presented. Several common themes emerged, which are reported in Chapter Three. Discussion in the workshop focused on the role of development information in mission-level decision making, an issue of growing importance in view of trends toward decentralization in AID.

In the framework of the micro-level focus of the mission reports, several broader policy points were emphasized in the ensuing comments. In particular, it was noted that:

- AID has no clear development information management policy and no framework within which missions can develop policies for information needs, management, and use;
- Management decisions are needed from top levels of mission leadership that information is important, particularly the feedback link between evaluation and design (or redesign); and

- Information content is the key issue, that is, how does information contribute to learning at the mission level. This is particularly important in an environment of decentralization, where decision responsibility in the field is greatly increased and where a reduction in staff levels is perceived as requiring fewer AID professionals to do more with less in a real-time environment. This situation allows little time to anticipate needs, to screen larger volumes of information for relevant materials, or to reflect on the information once it has been identified and is available.

Workshop findings were consistent with the analysis contained in the first ODIS strategy report with regard to policy issues and to the kinds of actual CDIE support to missions that is needed. It was particularly evident that, whatever the state of development of a mission library, use of that resource fell far below potential, as did opportunities for the current services of CDIE to be effectively integrated with mission information needs.

ASSESSMENT OF NEW INITIATIVES

Important objectives of the task order were to evaluate the impact of initiatives undertaken to improve development information management and use in USAID/Haiti and to explore implications of the pilot test for a longer-term ODIS program strategy. It proved difficult to evaluate meaningful change in patterns of information use in USAID/Haiti or even to assess the systems and services provided within the short time span of the pilot project. Thus, in Haiti it will be important for CDIE to assess further the role of the mission DIC, changes in information use by mission staff, and the impact of these changes on the work of the mission over a longer time period.

During the second task order visit to Haiti, an attempt was made to assess systematically the reactions to new DIC services and to the responses provided by DIC to specific information

requests subsequent to the first visit. (See Annex 6 for the evaluation form used for this latter purpose.) Reactions were also obtained to certain economic and social data provided by CDIE/EASA and to the MicroDIS software package in its state of development at that time. Nearly all of those interviewed felt that the information products provided by DI were thoughtful, responsive, and better than expected. Expectations of potential use of the materials were high. While these reactions are encouraging, they do not provide guarantees of actual use of these resources or evidence that this use will lead to improved program design, implementation, or evaluation at the mission level.

As part of the assessment, consideration was given to criteria by which CDIE can evaluate the impact of its services over time. These criteria are discussed later in this report.

EXPLORATION OF OTHER MISSION SCENARIOS

Based on a combination of the original strategy, the mission needs assessment, and an analysis of the prevailing circumstances at the time of the first study team visit to the mission, the focus of implementation in USAID/Haiti was on targeted technical assistance and training to help the mission library become a more proactive, user-service DIC. In other words, the focus was on the creation and improvement of local mission capacity to collect, organize, and manage information. This was consistent with the underlying assumption of the original strategy that, although the particular nature of the assistance needed by missions will vary, one common thread is the need for an active DI support role for the manager of the information resources facility (with or without an actual library) and for the key function of outreach to mission staff and the host country development community.

It was assumed that this scenario would be common among USAID missions but that there could be cases -- where there is no physical collection or, conversely, where the local information center is well developed and managed -- when a more systems-oriented strategy may be appropriate. At the same time, the possibility existed that different scenarios would be more appropriate under different mission configurations.

To address the varying ODIS requirements of alternative USAID mission scenarios, the task order therefore was modified to incorporate learning from needs assessments in missions other than Haiti. To do this, the study team visited the Dominican Republic in conjunction with the second Haiti trip, and then visited Indonesia, the Philippines, and Thailand in connection with unrelated travel for other projects. There was also opportunity to speak with the director of the REDSO/East Africa DIC while she was in Washington. Findings from these direct contacts and from CDIE staff travel to Egypt, Barbados, Honduras, and REDSO/West Africa are incorporated into the findings and recommendations of this report.

CHAPTER THREE
MAJOR FINDINGS

Based on task order implementation in USAID/Haiti, visits to other missions to assess development information needs, and other activities summarized in this report, the following key findings emerged.

MISSION INFORMATION NEEDS AND USE

There is broad recognition within AID, and especially in USAID missions, that good information, well used, could be a major asset in the accomplishment of the AID's development objectives. Moreover, there would appear to be general receptivity, at least tacitly, to efforts to improve AID's capacity to optimize the value of this resource to its planning, design, implementation, and evaluation efforts.

Under these circumstances, in view of trends toward decentralization to USAID missions of authority for project approval and other matters, it would be expected that information demand would be increasing. In fact, however, the initial reaction of the majority of USAID direct hire staff interviewed in Haiti and other missions leads to the conclusion that in real, operational, terms, there is no ground swell of demand for any major centrally operated information initiative to make available to USAID personnel more of AID's institutional memory. This unenthusiastic initial reaction is not universal, however, and many within AID, including those who are reasonably effective users of the information available to them, approach this issue as strong supporters of improved development information dissemination and management. But among the skeptical majority, the common initial reaction fell into three categories:

- AID staff are already too busy with their current bureaucratic and management workloads to deal with additional paperwork. This is felt to be increasingly true as USAID personnel are asked to do more with less;
- They feel that they suffer from information overload from all the cables, reports, documents, and other materials they already receive, and thus additional information, irrespective of its potential relevance or value, is seen by many only as additional paperwork with which they need to somehow deal; and
- They feel they already have access to sources for whatever information they need to carry out their jobs.

Under these circumstances, the initial reaction typically was that many regular AID personnel would have difficulty making effective use of the products of any ODIS initiative. Instead, it was felt that such information would be more important for consultants, who are seen as having more time and greater need, or for host-country counterparts, who also are felt to have more need for better information.

Thus, there currently exists a limited appreciation either of the potential for appropriate information to assist AID direct hires to do their jobs better or of the power of better information to improve program performance. Instead, there appears to be an element of cynicism, apparently conditioned largely by the circumstances in which many overseas staff find themselves working, regarding the general value of more information for whatever purpose.

When mission staff reflected more deeply on this matter during subsequent questioning, however, the overwhelming majority eventually cited areas in which they, in fact, felt they did have important and specific information needs that were not met by existing channels. Examples include:

- An institutional memory within the mission, a resource lacking in most cases as a result of rapid staff turnover and the absence of any comprehensive written record;
- Project-specific data to facilitate an understanding of the historic evolution of particular projects, both to improve current implementation and to assist in the design of comparable efforts;
- Evaluations, both for their own sake and to provide information about the individuals and firms that conducted these studies;
- Technical information to assist project implementation and, most often, to prevent the re-invention of wheels in the evaluation of new proposals or the design of new projects; and
- Summaries of lessons learned to help in preparation of project identification documents (PID), project papers (PP), ABSs, CDSSs, and other program or project documents, to produce sounder documents and to promote their saleability through the approval process.

Thus, the perspective that emerged is that a valuable service can be offered if appropriate information can be selectively provided in response to specific needs, to the right people, and in timely fashion. There currently is, however, little awareness of the extent to which capabilities are available (or could be developed) within AID that could provide this improved, focused, and responsive information. Prior to visits from persons representing CDIE, the services available through CDIE/DI were, with few exceptions, largely unknown to mission staff. Even mission librarians or their equivalent were often unaware of the range of available services or facilities, or of how to access them.

Even in those instances when the CDIE/DI services were known (usually to personnel who had spent time recently in AID/Washington), a significant level of cynicism exists, often based on prior experience in using the facility, regarding AID/Washington's capacity to be responsive to USAID mission

information needs. In many cases this is unjustified, based on unsatisfactory experiences from an earlier period in the evolution of DI, when its response capacity was far lower than is now the case. Clearly, CDIE continues to be faced with a major marketing challenge.

STATUS OF MISSION INFORMATION SERVICES

Findings in USAID/Haiti and elsewhere as observed in field visits or reported in the TDY workshop indicated that:

- No mission observed during this task order implementation had a planned, organized strategy to ensure that appropriate information influenced project design or implementation;
- To the extent that individual project officers effectively used information, it was usually through informal networks. The services of CDIE were often overlooked.
- In general, although exposure to the services of CDIE has increased, use of CDIE resources remains limited. Some of that exposure, and in particular the cables and letters that CDIE has sent to the field explaining the services it can provide, does not appear to have been effective: a common field reaction to this marketing is that it merely constitutes more paperwork that does not get properly circulated, read, or internalized in the thought processes of mission staff.

When stimulated and facilitated by a TDY visit, however, mission personnel in several places responded to CDIE marketing and produced a significant number of requests for information or information-related technical assistance. At such times, there also was a demonstrable tendency for missions to use such a personal visit to consider structural or procedural changes concerned with improving mission information utilization.

- The quality of staff, facilities, and collections in mission information centers varied greatly, although rarely were all three adequate (USAID/Egypt was one notable exception. Others might exist elsewhere -- possibly REDSO/East Africa and REDSO/West Africa, although inquiries by the study team were inadequate to enable such a generalization at this time). The typical

mission library is a repository for largely unwanted documents, rather than a service-oriented information center. These libraries generally are accorded low value (and receive little use) by their potential mission users. They are usually in a position that is marginal relative to important flows of information. They are highly vulnerable to mission pressures to cut budgets or obtain space for other purposes. There is no evidence to suggest that, in the absence of new perspectives on the utility and value of information as an important resource, this situation will change.

- The availability of information technologies such as microfiche, computers (or terminals), and telecommunications in mission information centers varied greatly. In no case were they effectively used. In most cases, they did not exist at all, although there was a acknowledgment (and reportedly a growing awareness) that computers and telecommunications were becoming available and, if properly applied, could lead to significant improvements. No such sympathy exists for microfiche.
- There is no common understanding among information centers in USAID missions concerning collection policies, a standardized data accessing vocabulary, or other standard information management practices. Many USAID information centers express the need for guidance and assistance from AID/Washington on these matters to help them better organize their own activities and operations, and regret that this assistance has not been forthcoming.
- Levels of mission support for information centers as measured by budget, staffing, and use were generally poor. To the extent that these centers played any meaningful role in the flow of development information within the mission, it was usually because this information was viewed as important by the mission director or another senior staff person with the clout to protect the center's space and staff from O & E budget tightening, or because of the presence in the mission library or DIC of an effective outreach-oriented information resource person.
- An appreciation of the potential role of a mission information center as a point of information outreach and brokerage (as distinct from a static collection) was limited, even among the advocates of improved information use. Until the ODIS intervention in Haiti, for example, there was no case where the information center director or other mission officer (for example, an evaluation or project design officer) had been given the role of anticipating information needs and proactively delivering

useful information products to potential users. However, among some missions (Indonesia, for example, and to a lesser extent the Dominican Republic), there were positive memories or times, under earlier staff configurations, when mission information centers were seen to be playing such roles.

In general, mission libraries or their equivalents, where they exist, are out of the mainstream of mission activities. The person in charge of development information is often not included in program discussions and does not see relevant cable or document traffic. As a result of these and related factors, libraries are often poorly used by mission personnel and are not responsive to mission programming needs. In some missions, in fact, libraries are viewed as warehousing operations -- dumping grounds for documents for which there is no perceived immediate need. Staff members retain documents or other information they consider important on shelves in their own offices, where other staff members frequently do not have ready access and where these materials too frequently are lost to the mission whenever this officer leaves the post for another assignment. All of these factors contribute to a situation where there often are lapses in a mission's internal information flow that result in negative program impact.

The mission library in Haiti was typical in this regard. Prior to the ODIS pilot project intervention, the library was a stand-alone operation without budget, supervision, strong support, clear objectives, or integration into ongoing mission activities. As such, it was commonly ignored by mission staff, despite having what was regarded as the best development collection in Haiti. It occupied space and frequently provided service to a wide range of non-AID customers, but it did not serve any clearly articulated purpose or role within the mission structure.

MECHANISMS FOR LOCAL INFORMATION MANAGEMENT

There are two diverging perspectives on the issue of how AID might best address issues of using development information resources more effectively in the USAID mission context. Some observers argue that a focus on mission information centers, or the particular staff who manage these centers, is not enough. The key is how information is used. From this perspective, any strategy must address the information needs of mission-level program economists, evaluation officers, and project design officers, who should be the main users of lessons learned. The challenge is to understand what is needed sufficiently well to be able to provide it, and then to understand the mechanisms for most effectively reaching these key personnel.

Others maintain that, to forge effective information links to key information users, there must be effective interaction and that this brokerage role is what makes a mission information center director (with or without a library) the key person for CDIE attention. In this context, training and technical assistance for this person, especially in areas of outreach, become a critical CDIE input.

Both groups are right. Improving local information management is an issue of:

- Policy initiatives that influence incentives for those mission staff who should take leadership in effective information use; and
- Management initiatives in CDIE that optimize what can be accomplished within the existing policy environment.

The focus of this task order was on the latter issue, that is, given the current ambiguous policy environment regarding development information use, what can be done to upgrade information quality and create demand for its use? The key to this effort is a basic orientation toward information brokerage, that is, an informed awareness of the potential power of good information made available in timely fashion to clients who can make good use of it. In addition to an outreach or service orientation, and good knowledge regarding locations of information and the means for accessing it, this orientation also requires a healthy element of information entrepreneurship, an inclination and a willingness to take initiatives to seek markets for information and to then provide relevant services.

At the mission level, the brokerage function could, in theory, be performed by a design officer, an evaluation officer, a program officer, or a combination of these staff. In reality, however, mission staff shortages make it unlikely that any of these persons can devote the time necessary to get the job done. More appropriately, one of these staff may be given supervisory responsibility for a contract-hire, specifically charged with the information brokerage function. This person should have development credentials and the skills to market and promote information services. Library skills are a good asset but are likely to be less essential.

At present, it is uncommon to find even the supervisory task taken seriously or performed effectively. The lip service given to the importance of information must be translated into specific mechanisms that can be implemented, linking the significant resources of CDIE more effectively to mission personnel. This is the primary task of an ODIS project. The Haiti experience gives promise that it can be done.

MISSION RELATIONSHIPS WITH AID/WASHINGTON
INFORMATION RESOURCES

The key resources for any mission director are people, money, and information. Task order enquiries to date suggest, however, that many mission directors display considerably more recognition of the importance of the first two resources than of the key role of information. Only by creating demand for information as a critical development resource will effective support be given to the necessary mechanisms to ensure good information content and flow. Thus, CDIE must address issues of supply and demand if it is to be a significant factor in the mission information management equation.

The potential of CDIE to provide program-relevant information services is not widely recognized among AID personnel in overseas missions. Many of these staff do not perceive how CDIE products and services can sufficiently assist them in the performance of their immediate duties to merit the effort of calling upon them. Field staff more often resort to their own information sources in AID/Washington than either to a mission information center or to CDIE. Aside from factors noted above, this is usually a result of past contact with known sources, such as the USDA Technical Inquiry Service, friends in AID/Washington, or bureau personnel, or of negative perceptions concerning CDIE/DI services and facilities. This pattern circumvents the structures of mission libraries or CDIE, although these structures now could often provide better service. This bypass tendency works against rational information management within a mission. It also does not enable systematic exploration of the full range of resources available through AID.

It is clear that in implementing an ODIS project, either on a pilot basis as in Haiti or, later, worldwide, AID/Washington should undertake a promotional (marketing) program among USAID

missions regarding the resources that are available and the means to access them. This marketing can be accomplished only through personalized presentations in the field. Concurrently, it will be essential to evaluate the relevance to mission needs of the products and services of DI and other AID sources and to reinforce ongoing efforts to improve these resources. In the immediate aftermath of the pilot-project visits to USAID/Haiti, more than 25 information requests were sent to DI. In the following few weeks, more than 10 more were received, one-half from those who had requested information earlier and one-half from new users stimulated by their colleagues and the DIC staff. It is important to note that the DIC Director at USAID/Haiti has recently reported that these new users within the mission have become active, and vocal, supporters of the ODIS initiatives undertaken within the context of this work order. This information helps verify an important thesis of this report: that good services provided via the intermediation of an effective DIC manager can create their own constituency of active and supportive information users. A similar pattern could easily have been repeated in all the other missions visited by the study team and in fact probably would have been if it had not been for the expressed concern of DI research and reference staff regarding that unit's capacity (during its current reorganization under a new contracting mechanism) to process properly the exponential increase in service demand that would have resulted.

This experience suggests that efforts of this sort can have a major impact on use of CDIE services by mission staff, provided that the services and products provided do, in fact, serve real mission needs.

CHAPTER FOUR

MAJOR ISSUES

From the findings reported in Chapter Three, several issues emerge as particularly significant for the design of an ODIS initiative. These issues, especially as they suggest modifications in the original strategy, are discussed in this section. Not explored here in any detail are issues relating to programmatic outreach of ODIS initiatives to developing country institutions. Although this matter was incorporated in the original strategy paper, it was explicitly omitted from current task order activities to enable a concentration on what was seen as the higher priority task of ensuring effective development information management practices and procedures within AID itself.

The activities undertaken during the implementation of the current task order confirm the appropriateness of this approach. The challenges to be faced in inaugurating effective overseas development information support to USAID missions are sufficiently difficult that any major diversion of resources or attention to other matters could undermine the potential for success in achieving the project's primary objectives. This is not to suggest that the eventual provision of ODIS initiatives to developing country institutions should be dropped as a project objective, but that those activities should be temporarily deferred to later stages of implementation. Ancilliary activities in support of this approach could, of course, be undertaken concurrent with activities focusing on USAID missions, provided that they did not detract from the project's initial primary objective. This perspective is incorporated into the remaining sections of this report.

DEVELOPMENT INFORMATION CENTER FACILITIES VERSUS LIBRARIES

Experience from the ODIS pilot project in Haiti and from observations elsewhere has underlined the importance of understanding the mission-level information brokerage function as something distinct from the traditional mission library.

As an oversimplification, USAID mission libraries have been viewed in large part as warehousing operations, that is, repositories of documents for which no one has any immediate use, but to which someone might ultimately want to refer. Useful information usually is retained in individual offices. The concept of development information brokerage, however, suggests a different set of concepts and practices. Based on the idea that information in the USAID mission context has value only to the extent that it can be used when it is needed, the brokerage concept identifies requirements for proactive outreach activities to ascertain real needs, information accessing capabilities to enable timely identification and retrieval of pertinent materials, and a timely dissemination capacity.

Information in this context could almost be considered to be disposable, that is, once it has been used for its intended purpose, its value would already have been realized and therefore there might be only marginal cost efficiencies in warehousing it in any conventional hard-copy mission-based library facility. Properly managed, however, this information might (depending on its perceived importance and the ways in which it was generated) be machine retrievable from computer storage, either through centralized facilities or, in certain cases, mission-generated and -maintained data bases. These data management technologies are well understood, and therefore can reasonably be incorporated into ODIS implementation plans.

Thus, a mission DIC may or may not have a hard-copy collection of development-related materials and may or may not currently have anything more than indirect access to information technologies such as computers or microfiche. What it must represent is some level of designated and appropriately placed staff effort, linkage to AID and non-AID development information resources, and an orientation toward marketing of appropriate information to those who need it.

Given the nature of information flows and needs in most USAID missions, library functions in the more restrictive sense identified above are likely to have impact on mission programming only to the extent that they are organized and conducted within such an information brokerage program. Insofar as they cannot accomplish this, they should fall outside the purview of any ODIS program. The following sections elaborate on this perspective.

Staff and Organizational Placement

As a practical reality, the critical functions of information facilitation, coordination, and marketing that are recommended in this report will not be performed in the absence of appropriately trained and supervised staff in the mission. The critical responsibilities of these staff are to ensure that patterns of effective use of lessons learned and of programmatic outreach to developing country institutions concerned with information use will be developed and maintained. In addition to the mission director, the key clients of CDIE for development of these patterns are staff such as the mission economist, project design officer, evaluation officer, and other program office staff with responsibilities for mission strategy and project development. Generating from these key staff a demand for good information will create a broader base of demand from others involved with program implementation.

Reaching these key information clients requires the supporting mechanism of some sort of mission DIC. Depending on mission circumstances, this need not be a sizable or elaborate operation. The point only is that the functions need to be performed. As noted in the original strategy paper, actual physical and administrative placement of local DICs within USAID missions is likely to be crucial to their legitimacy, success, and sustainability. Since circumstances differ among missions, different formulas will have to be applied in different countries. Nonetheless, some uniform standards can and must be applied. These include requirements that staffing and placement be designed to:

- Ensure continuing active interest and support from mission management;
- Provide high visibility of the information brokerage function and especially of the DIC services within the life of the mission;
- Facilitate a high degree of interaction between the information staff and other mission personnel;
- Ensure reasonable continuity in staffing; and
- Ensure institutionalization of DIC-type functions so that they might survive staff turnover among mission patrons and clients.

At USAID/Haiti, the information center was placed under the administrative oversight of the executive officer, primarily as a consequence of its physical location. None of the above criteria had been a factor in this decision. Fortunately, however, the executive officer had an interest in the information function and provided critical administrative support for the ODIS pilot project initiatives described earlier. Moreover, the chief of the mission DRE (program) office was prepared to provide programmatic oversight. This combination of patrons appears to be appropriate in this instance.

In other circumstances, other configurations might prove preferable. One attractive possibility in some missions is a formal linkage of the DIC function to the program office. This is the case in the Dominican Republic, where the program office has recently taken some limited initial steps to revitalize an information center that fell into disarray after the departure of a staff person-in-charge over a year ago. This person had not been replaced when the study team visited the mission, but a job description had been prepared as a basis for hiring locally a new part-time staff person. This job description included only traditional library functions -- such as collection management and cataloging. As a result of the brief study team visit, consideration was given to broadening mission understanding of the position to incorporate an emphasis on information outreach. It should be noted that comparable opportunities for ODIS contributions to mission DIC-type initiatives arose in every mission visited by the study team, thus helping to confirm what would appear to be broad mission receptivity to ODIS initiatives.

The traditional boundaries of a library operation must be firmly penetrated if effective information management is to occur. At the same time, it would be a mistake to abandon the concept of a physical location in a mission (where possible) as a center for the information management and networking function. An information resource center does not need to have any documents in it, as long as it retains the capacity to identify required information and then locate and expeditiously retrieve this information. Such an information resource center does, however, need to have a physical location, that is, a place where users or potential users know they can go when they need assistance to identify or obtain information. Thus, many of the functions of a DIC will be more effective if centered in a designated space with certain facilities.

Mission information staff should be expected to function as information brokers, creating demand for information and then ensuring that the demands are met. Thus, experience in the management and use of information, plus an informed interest in development issues, are important qualifications for DIC staff. Technical skills in collection management are also important since these staff are likely to be involved with information acquisition, storage, and retrieval. But needed library skills may be taught through training programs. A basic orientation to effective programmatic information use should be the primary qualification. In the USAID/Egypt DIC, for example, the director remembers the personal interests of staff and routes books, magazines, and newspaper clippings to them. A similar approach used to be applied in Indonesia. These initiatives are viewed by mission staff as a useful service, one that enhances the credibility of the DIC resource.

As a practical matter, standard position classifications normally used by missions for information center staff are highly inappropriate. These usually derive from positions defined for Library of Congress or U.S. Information Service (USIS) purposes. There is no existing official position classification series that is particularly germane. Some missions feel bound to official classifications found in AID handbooks as a basis for determining qualifications and salary levels. Others will write job descriptions, based on their own determination of the tasks to be performed and, on that basis, determine appropriate qualifications and salary grades. USAID/Cameroon, for example, has done this and incorporates "providing current awareness services" in the job description. USAID/Egypt titles its DIC head a "Technical Information Specialist." The position description for this person includes being "an information and documentation resource" and "providing liaison with AID/Washington offices

responsible for maintaining the AID memory." These efforts to understand and define the DIC staff role in terms that go beyond traditional library duties are rare and should be encouraged.

Linkage to Information Resources

A major contribution of the investment CDIE already has made in preparing and assembling a wide range of development information resources is that it frees missions from the necessity of developing these resources for themselves. Still, the centralized resource is only as good as the linkage that missions have to it and how well it serves local needs. A crucial objective of an ODIS project must be to serve that linkage function and, through ODIS project implementation, institutionalize mechanisms for its sustainability.

Missions have three major concerns in the area of information resources:

- Access to selective portions of CDIE's Development Information System (DIS);
- Access to centralized AID and non-AID information resources other than those available through CDIE/DI; and
- Integration of local information resources into the system.

Assistance in the development of site-specific local databases represents a major contribution that ODIS can make to the effective use of its institutional memory in project design and implementation. Most mission-based USAID staff believe that local material is usually of greater relevance to their task than material from other locations. Despite this fact, few USAID information centers serve effectively as reservoirs even of local

lessons learned. And even when they do, mission personnel usually do not make effective use of that resource because they have not been made aware of its availability.

The fundamental challenge is to ensure the best possible mechanisms, given whatever situational circumstances exist, for linking users with the information they need -- whatever the source -- in timely fashion. The function filled by a mission DIC is to recognize needs and then find and deliver the appropriate information content within the time frame required by the circumstances. For example, a project officer with a design task should have access to evaluations of similar or related projects in the country where she or he is works, plus selected evaluations and technical studies addressing similar activities elsewhere. Sources for this information may include, for example, the DIS, other CDIE units, donors active in the country, commercial databases, and the office bookshelves of mission colleagues. The chances are that few, if any, of the most important information inputs will be on the shelves of the mission library, however well organized and cataloged. Here again, the primary role of the mission DIC is to broker information, not manage a collection.

Outreach Orientation

The foregoing points to the need for a strong outreach orientation to manage the development information function of USAID missions. This role is increasingly important as program decision making in AID is decentralized. Mission directors have more project approval authority than ever before. To exercise this authority responsibly, they must be able to judge the merits of the concepts and proposals put before them. To exercise this judgment, they and their staff need information that documents relevant development experience. In particular, this calls for more effective use of evaluation and other findings and a closer link between these findings and project design.

For an information center director, effective outreach requires being knowledgeable about mission program priorities and direction. This means access to key staff; important planning documents; and relevant mission communications, including cable traffic. Proposed new strategies for the USAID/Haiti DIC include participation by the DIC director in concept paper and project review meetings, regular contact with mission project offices, and study of the mission action plan. Addition of a part-time assistant in the DIC will increase opportunities for the director to engage in outreach activities outside of the center itself.

Assuming a well-informed DIC director, many possibilities arise for proactive information services rather than merely responding to service requests. Materials relevant to a new project design initiative can be assembled from various sources in an anticipation of requests and made available to the design officer immediately prior to the time when he or she might need it most. Current state-of-the-art information is of particular value. Informational bulletins can announce new services or information resources to mission staff. Information available from other donors or host country institutions can be checked to augment what is available from AID sources.

The Haiti pilot project as well as the experience of other CDIE staff visits to USAID missions demonstrate that a little information entrepreneurship can go a long way, frequently in a cost-effective manner, in determining prime information users and identifying priority needs. Persons working within mission contexts who are properly trained and motivated could, provided that adequate field information support existed, be invaluable in promoting ODIS objectives.

FIELD INFORMATION SUPPORT SCENARIOS

Although the core elements of an ODIS strategy will be similar in different mission settings, there should be enough flexibility to address a range of mission scenarios. This task order incorporated findings from visits to nine missions by either the study team or CDIE staff. Findings were discussed in a workshop planned to exchange learning from these field visits and to categorize patterns of mission information use and potential CDIE support. The following analytic framework emerged from these discussions.

Field Variables

Key factors in evaluating the mission environment of development information acquisition and use include the following:

- Staff (and training): The key to effective information services is human resources. The most important element in a USAID mission is a designated person with sufficient responsibility, skill, and motivation to perform the information brokerage and networking function. This person may be a mission officer responsible for project evaluation, design, or both, but will more often be a locally hired librarian or other dependent or Foreign Service national. Of the missions included in this study, only Egypt had an appropriate arrangement for this staff function. (It has been reported that REDSO/East Africa also has appropriate arrangements.) In Haiti, a potentially strong DIC director lacked supervision and training. In several missions, this critical role was not played at all.
- Information resources: Some missions have local libraries with shelf collections. These range from poor to good in terms of content, organization, and cataloging. Another variable is the degree of networking with local information sources (including universities and technical institutes, government agencies, the Peace Corps, private voluntary organizations, and in-country donor agency offices). Awareness and use of the resources of CDIE also

vary widely. In some missions, personal networks with other AID staff, both in Washington and the field, are an important information source.

- Facilities: Although the importance of physical facilities is secondary to staff and access to information resources, it is a variable that reflects the seriousness of mission interest in information use. In USAID/Haiti, a sizable open room is available for the mission development information collection. Comparable physical facilities are available at USAID/Thailand. In the Dominican Republic, a small library located in a vacant office near the program office has been largely neglected, as has an agriculture-related collection that is housed in the hallway of a separate building. In Indonesia, a once spacious library has seen over half its space grabbed by more powerful mission interests shortly following the departure of a supportive mission director and a capable professional DIC director. (Staffing has also been downgraded, and the quality of services of this information center has declined substantially as a result.) At USAID/Philippines, an otherwise good physical facility is housed in a far corner of the mission in an area that rarely is visited, partly because of its isolation and partly because the library is outside the flow of useful mission information.
- Budget: Few missions have a separate library or information center budget. Salaries for staff (if any) are usually in separate categories, and other costs are accommodated out of undesignated administrative funds. Although the non-salary financial needs of an effective DIC are not large, the designation of even a small budget can facilitate effective management, particularly the timely acquisition or dissemination of important materials not available through CDIE. One example of how the absence of this budget flexibility can have an undesirable impact on information services currently exists in Indonesia, where a recently instituted and complex prior-approvals requirement now deters the DIC from providing requested documents to substantial numbers of the USAID consultant/contractor community, which traditionally have constituted a significant portion of that center's clientele.
- Mission support (patronage): In virtually all missions, lip-service is given to the importance of information. The need is to put some operational commitment behind this lip service, and rarely is much initiative taken in this regard. When it is, however, support may come from the mission director's office, the program office, certain sectoral offices, or a combination of these. In

these instances, the information function acquires one or more patrons, and these people are essential to the undertaking.

In Haiti, there is a readiness to support strategies to improve information management. The Haiti experience demonstrates that CDIE can facilitate action at the mission level by identifying patrons and working with them to identify and implement appropriate strategies. In some cases, it may be necessary to begin with an effort keyed to a particular office, such as project development, or a major program sector. The seed must be planted where it has a chance to grow. Testing the soil, that is, finding a patron or patrons, is an important part of the process. Patrons, however, represent a tactical point of contact. The strategic focus should remain on approaching and engaging key mission information users -- those responsible for strategy and program development.

- Available technologies (and capacity to use them): Information technologies such as telecommunications, microcomputers and terminals, and microfiche are tools of potential value if the human resource requirement is met and budget permits. The microcomputer software program MicroDIS being developed by CDIE, for example, has great potential for improving field access to bibliographic and even textual information, as well as assisting local cataloging. All of these technologies have the potential to reduce or even eliminate the need for shelf collections where space is at a premium. Of the missions reviewed for this task order, only Egypt is using these technologies in an information center context. Interestingly, among the several missions visited that were moving toward general mission automation and computerization, there was little appreciation expressed regarding the potential value to the mission of this automation within the context of existing library operations. At the same time, however, there was broad support for the idea of automation within the management information systems context of any newly constituted DIC. Mission personnel readily understand the basic distinction between the document warehousing functions traditionally ascribed to mission libraries and the information management and dissemination functions that are inherent in the DIC concept.
- Other in-country information resources: In Haiti, where there is no good collection of development-related information, the function of the DIC as a resource to host country students, researchers, and development managers assumes considerable importance and is an argu-

ment for maintaining a strong shelf collection. In countries where non-AID development information resources are better developed, building links to these resources may be more important than building a hard-copy collection.

The above criteria provide a basis for assessing the development information management scenario in a USAID mission in order to plan effective CDIE support strategies. In doing this planning, a variety of support mechanisms are available.

CDIE Support

The focus of ODIS support to field missions should be on the following elements:

- Technical assistance: The basic requirement of an ODIS project must be to support the development of the overall managerial commitment and capability needed to plan for and cope with information management problems and opportunities in the field. As the Haiti pilot project demonstrates, an investment of training and technical assistance directed toward the mission staff responsible for information brokerage can yield major dividends. This approach can be supplemented by working also with key patrons who have supervisory responsibility for the information center manager. These activities also can help establish within a mission a working environment that is more information responsive. In USAID/Haiti, the involvement of the executive officer and DRE (program) office chief in the development of the DIC Action Plan, and their continuing role in overseeing its implementation, help translate the mission director's interest in better information use into specific and relevant actions.

A specific form of assistance needed in any mission DIC is a policies and procedures manual covering the main points of DIC management. This should be in loose-leaf form to permit customization and frequent modifications. One element of this manual could be a list of core documents that any development library should have.

- Document and research services: These basic functions of CDIE/DI represent a key extension of the services that would be available to any USAID mission through an effective DIC. Responses to requests from USAID/Haiti (see Annex 5) were highly rated by users. This resource is particularly important in settings where access to local country materials in the mission or elsewhere in the host country is limited. But even where local resources are available, DI assistance can fill major gaps in the opportunity local mission staff have to perform research for themselves as a result of the severe time constraints under which they work. The experience of the task order and other CDIE field visits suggests that demands on these services are likely to increase dramatically in the wake of ODIS outreach to the field. These demands will have to be accommodated by DI or through a strategy of building regional or mission-level capacities to perform similar research services. Either option may have serious staff implications unless DI can introduce considerable, and perhaps unattainable, operational efficiencies.
- Economic and social data: Examples of computerized data available through CDIE/EASA were demonstrated to interested staff in USAID/Haiti (primarily those involved in economic analysis), and the availability of these materials was discussed in several other locations such as the Dominican Republic and the Philippines. Although interest was high in some circles, particularly if recent statistics were available, the degree of cynicism expressed concerning the potential value of data derived from non-local and potentially out-of-date sources suggests the desirability of further evaluation of these data from the field perspective. Any such evaluation should also be sensitive to the field perspective that CDIE/EASA operations currently required much more of the field than it has thus far proven capable of returning to it. Thus, the EASA office is perceived by some in the field as being primarily a "hidden requirements" bureau, that is, an ostensibly service-oriented operation that in fact requires more support from the field than it provides as useful services to the field.

Historically, staff in the USAID/Haiti had not been aware of or used data or statistical analysis services from EASA. There were attempts under way, however, to develop a Haiti-specific economic and social database and various related microcomputer databases for analytic purposes. Time-series data for this purpose are obtained from printed reports acquired from the World Bank, contractors, and other non-AID sources. EASA's information products and technical assistance in data collection and analysis are of direct relevance to this

effort. In particular, EASA should encourage and assist in greater use of statistical analysis that links EASA use of statistics to mission policy and program concerns.

- Technology transfer: There is great variety in the information technologies available in USAID missions. Most now have microcomputers, although the availability of these machines for general-purpose use is often limited. In no mission observed under this task order was there a microcomputer available for use in the mission information center. Many missions are struggling with the need for an automation plan, but, in general, USAID missions lag in effective use of automation and have found AID/Washington guidance in this area more restrictive than helpful. In most (but definitely not all) missions, any ODIS strategies keyed to the local mission-wide use of microcomputers may have to be deferred until larger issues of AID automation are resolved. Those missions where microcomputerization is imminent might, however, be technical testing grounds for later, wider, application.

Several missions have microfiche readers, but they usually are not an important factor in information management and are virtually never used by USAID project staff. As a tool for a DIC manager, microfiche can serve as an easy means to make available the index to the DI document archives until microcomputers and the further development of MicroDIS can serve the same purpose. Microfiche properly used can be an efficient text transfer and storage medium, but this function is secondary to the more fundamental task of information brokerage. Moreover, most of the advantages of microfiche for USAID mission use will be duplicated and exceeded by computers when text transfer on high capacity disks becomes feasible.

Thus, technology should be part of any new DIC development strategy but only as a tool to assist the primary networking and outreach functions, which, in turn, are dependent on human, not technical, resources.

Telecommunications, another technology with future potential, also will open a range of alternatives for information access and transfer. In the ODIS context, these technologies should be viewed as tools to assist patterns of information utilization that are not dependent on the technologies themselves for their development. In sum, the pilot project verifies the earlier strategy study's de-emphasis on technology solutions. A human resource focus is more to the point. It also is a necessary precursor to more effective automated information management and use.

- Service promotion: Various steps should be taken by CDIE, possibly through ODIS, to promote its services more effectively. Assuming that, as the pilot test in Haiti demonstrated, the quality of the services are their own best advertisement, use should beget more use and the key task is to generate first-time use from the large pool of AID personnel who are not now aware of CDIE services or, for whatever reason, are disinclined to use it. Strategies to accomplish this include the preparation and delivery of targeted information packages in an anticipatory rather than reactive model, for USAID staff. The basis for the preparation of these packages would be a mission program profile based on documents such as the CDSS, congressional presentation, and mission action plan, or other reliable sources of information on forthcoming mission information needs, such as participation in PID review meetings or, preferably, the annual meeting of mission directors (Directors' week) in Washington to review and approve country programs. An example of such a profile, based on an analysis of available documents, for USAID/Haiti is contained in Annex 2.

Other CDIE products also can serve as attention-getters. For example, the potable water Project Manager's Reference Guide was of great interest to the engineering office of USAID/Haiti and led to requests for a variety of other materials. Similarly, the special evaluation studies of CDIE should be disseminated, on a carefully targeted and selective basis, to missions that are undertaking or plan to begin relevant programs. Furthermore, these documents should be disseminated along with recommendations regarding use of this material to improve program planning, project design, and implementation. Another strategy to improve awareness of CDIE (while also improving the preparation of TDY teams) is to pre-brief short-term evaluation, project design, and other teams in Washington using materials available from CDIE. This has been done for some time by the AID/ANE/DP office, especially for evaluation teams. A similar concept could be applied to AID staff transferring to a new country. CDIE is well-equipped to provide these personnel with appropriate briefing materials as they pass through Washington between assignments. These strategies help promote awareness of CDIE while contributing to appropriate development information use.

An additional service element concerns the timeliness with which CDIE products and services can be delivered to users. Many examples were cited during the course of this task order work where requested information reached intended users too late to be of value. Subsequent inquiries in Washington indicate that this frequently results from mail room delays, not from slowness on the part of CDIE staff. To the extent this is true, administrative solutions designed to speed the flow of documents to USAID missions seems called for.

- Indirect support via AID/Washington activities: Missions that the study team visited were able to suggest a variety of ways in which CDIE products and services could significantly assist them without the necessity of direct CDIE intervention in the field. Suggestions included:
 - Ensuring that lessons learned syntheses were prepared for and provided to PID and PP review committees meetings in Washington, D.C.;
 - Freeing missions from having to provide similar or identical information to multiple interested parties in AID/Washington, by coordinating more closely with other AID/Washington offices, especially the Bureau for Science and Technology, and thus serving as a centralized information dissemination center on behalf of USAID missions;
 - Coordinating closely with other AID/Washington offices, especially the Bureau for Science and Technology, to fill information requests from those offices, thus freeing USAID missions from having to do so and enabling them to get on with their work; and
 - Linking CDIE with the Development Planning (DP) and Technical Resources (TR) offices so that CDIE and especially DI's support role are placed more directly in the USAID mission support chain.
- Regional offices as centers of information brokerage: In several areas of the world, including Africa, Latin America, and the Caribbean, AID has regional offices (REDSOs) whose role in information support to area USAID missions should be explored. Especially for very small missions, it may be more efficient to provide the information networking and brokerage function from a regional office that would serve as the DIC for some missions and help support DICs in larger missions that can afford their own staff person(s) and facility for this purpose.

TECHNOLOGY IMPLICATIONS

As noted in the original strategy paper, CDIE can contemplate a wide range of technical options in planning its activities for the dissemination of development information through the ODIS project. These options revolve around choices of computer software, computer hardware, transfer media, and related future technologies. In making technology choices, CDIE should keep in mind that the effective use of information in the field does not depend on the presence of hard copy, microfiche, or disk-based library collections, but on capacities to identify, obtain, and transfer relevant materials to users in timely and cost-effective fashion.

Technology-based tools can serve this priority. Use of microcomputers with bibliographic access software such as MicroDIS creates an attractive opportunity to provide highly customized sets of index and text material to missions. Coupling this technology with a high-capacity storage medium, such as optical disks, gives promise of a space-efficient and easy to use information resource for a mission DIC. The telecommunications capacities under development in AID are also of obvious interest. There is no reason to expect, however, that factors in the effective use of state-of-the-art technologies will be any different than for use of a traditional library collection. The key element will be a person or persons with the responsibility and capability to link the information management technology to mission users.

CDIE-related information technologies should be integrated with and contribute to other automated information management at the mission level. Recognizing this, the ODIS project will need to monitor information-related technology development, particularly as it involves tools for local information management.

TRAINING IMPLICATIONS

A human-resource-centered approach to overseas information support places a premium on training and motivation, especially for the staff responsible for mission DIC management. As in Haiti, a USAID mission will typically have or will be inclined to hire a DIC manager with little training in needed skills for effective information management and outreach. If any specific qualifications are required, they are usually defined in terms of library-related education or experience. However, formal library training does not of itself equip someone for the DIC task, although it is a relevant asset. More important, but less easily identified, assets will include the information brokerage skills cited throughout this report.

For the Haiti pilot project, the training focus was on outreach, networking, reference activities, and general user services and, to lesser extent, on technical skills such as acquisitions and cataloging. Training was performed on-site at the mission in Port-au-Prince by the outreach coordinator on the DI staff. Training methods included discussions about strategies and procedures, readings from source material dealing with information management, field visits to other Port-au-Prince libraries, and sharing examples of relevant information materials. A report of the training TDY in Haiti appears in Annex 3. One key result of the training was development of an action plan (Annex 4) detailing specific priorities for DIC management and DI support. This action plan included preparation of a mission-specific DIC operations manual.

Certain types of training -- particularly orientation to the resources and services of CDIE -- might best be performed in Washington, although some of this training also could be done in

the field, provided the necessary teaching aids were available. Other aspects such as local networking and promotion strategies are best handled in the field. A combination of the two will be most beneficial, but factors of cost and time will influence the training strategy in each particular case. What is clear from the ODIS strategy recommended in this report is that training must be a priority element in CDIE services to the field.

Training of USAID mission staff and other DIC users also will be useful, or necessary. In addition to sensitizing these personnel to the breadth of available information resources, this training also should assist DIC directors in helping information users understand how best to formulate requests so that they can obtain the kinds of information in the types of packaging that will best meet their needs.

By coincidence, the USAID/Haiti librarian had the opportunity to attend a training course in DIC management sponsored by the Organization of American States (OAS) that occurred during the pilot project but prior to the DI training TDY in Port-au-Prince. This was a fortuitous development but revealed the fact that such courses were not a resource that AID normally used or of which it was even aware. Although USAID/Haiti supported the OAS training for its librarian, the initiative came from the librarian herself and she was the only AID-related person at the training. In many cases, such third-party training opportunities may represent a cost-effective opportunity for CDIE to support local information management capacities.

MONITORING AND EVALUATION CRITERIA

An important component of an ODIS project will be the ongoing assessment of mission support initiatives to learn from the experience of implementation and redirect new initiatives where they will have the most impact on effective information

use. At one level, CDIE has an obvious interest in the difficult task of assessing the impact of information on the development process itself. It is widely assumed that good information will lead to informed AID policies and better project design and implementation. This is a difficult assumption to test, although there is ample empirical evidence for the reverse proposition that ignorance of documented lessons learned has led to demonstrably poor projects.

It is not the responsibility of the ODIS project itself to prove the ultimate impact of information on AID's development policies and programs although it can contribute to that CDIE agenda. It is essential, however, for ODIS to offer perceived value to USAID personnel who need information resources to do their jobs effectively. The project must also evaluate its success in promoting information transfer to the field and information management and use in the field. Specific criteria to be used are discussed below.

Active DICs Developed and Sustained

The premise of this report is that the key to ODIS success is the existence of an information linkage and brokerage function in a USAID mission. The focal point of this function can be expected to be on a DIC, consisting of designated staff and, in most cases, some designated space and facilities. Effective performance of the staff function over time is the key factor to be measured. Facilities, technologies, and libraries, if any, are only tools in the performance of the basic tasks of information networking, brokerage, and outreach. USAID mission support for the development and continuation of the local DIC function (as defined in this report), in cooperation with the support role of CDIE, will be the major evidence of ODIS success. Mission libraries have traditionally been vulnerable -- often, but not always, for good reason -- to competing demands for staff,

budget, and space. Situations in which key DIC functions survive turnover in DIC staff, mission directors, and other identified mission patrons will be especially significant as a measure of ODIS success.

Number of Field Requests

Requests from mission staff to CDIE/DI for information services are one evidence that the information is valued and that the mission DIC is engaging in effective outreach activities. Increases in the number of requests, especially in the absence of any special TDY-related promotion of DI services, demonstrate growing awareness of and satisfaction with these services. Information requests are a particularly important indicator within an ODIS strategy that emphasizes information brokerage rather than local collection building.

This indicator must be used with care, however, as successful ODIS implementation will also enhance the abilities of the missions to provide needed information using their own resources and the networks centered on their own DICs. Thus, an accurate assessment of user request data will, in the long run, require an aggregation of data from AID/Washington and all participating missions.

CDIE is well aware that a growing number of requests carry the risk of longer response time lags or compromises in the quality of responses, especially when the requests involve demanding research tasks. It will be important for the ODIS project to monitor the timeliness of its responses and the quality of its work. In addition to user feedback (see below), ODIS project staff should work with CDIE, and especially DI, to maintain monitoring procedures that will provide early warning of service breakdowns.

User Evaluations

Users are an obvious source of feedback regarding the services of CDIE. DI has already initiated systematic procedures to solicit user evaluation of its services. This effort should be continued using mission DICs as a vehicle for follow-up of users. Within the Haiti pilot project, all mission information requestors were subsequently interviewed using the protocol attached as Annex 6. Because of the time constraints of the task order, these interviews were conducted within one or two weeks of the time the information was delivered to the requestors. This interval was insufficient for assessing usage, let alone perceived impact of the information. It will be important for ODIS to obtain user feedback over a period of up to six months or even longer from at least a sample of requestors to assess the value of its services adequately.

Evidence of Information Use

The major purpose of an ODIS project is to use AID's institutional memory and other development information resources to improve USAID mission capacities for project design, management, and evaluation. Although measuring capacities of this sort is an elusive task, it will be possible to examine evidence that the lessons of experience are incorporated in project planning and implementation by selectively reviewing mission program and project documents. When mission strategies and project rationales are built on documented lessons learned, this will be evidence of appropriate information access and use in that mission. These instances should be cause for further analysis to determine the role of the mission DIC and of CDIE services in facilitating the observed information use. In this way, effective local DIC management strategies can be identified and shared with other missions.

RESOURCE IMPLICATIONS

This section highlights resource implications of the task order, particularly as they differ from the conclusions of the initial strategy study. This report assumes the integration of an ODIS project into ongoing CDIE/DI activities and, therefore, the availability of key financial and other resources outside of the project itself. Boundaries between an ODIS project and the ongoing activities of CDIE will of necessity be somewhat unclear since ODIS is planned as a mechanism to improve delivery and use of services that, for the most part, already exist. A revised illustrative ODIS project budget is presented in Chapter Six.

CDIE Support

Existing or potential user-oriented services of CDIE such as technical assistance, outreach, and training have particular relevance to the ODIS project, especially in view of the recommended emphasis on building local capacities to manage information, as distinct from an information dissemination focus. Although the costs of delivering these services to USAID missions can be included in part in the ODIS project budget, the CDIE staff and organizational resources that make the services possible will not be funded from ODIS. Project funds will be supplemental; ODIS will depend on CDIE for management oversight; office space and facilities; technical assistance and support personnel; and access to the DIS, economic and social database, and other CDIE information resources.

The pilot project suggests that ODIS outreach will lead to a substantial increase in information requests from the field, many calling for relatively complex research services. This may ultimately require a choice by DI to either increase staff resources for this purpose or to ration requests. It is not

recommended that the ODIS employ a research staff that parallels the existing DI researchers, although ODIS might utilize its project staff in a gatekeeping role to minimize duplication and achieve other efficiencies in request handling from the field. Under any circumstances, close coordination will be essential between ODIS and all relevant elements of CDIE, and especially DI's Research and Reference staff.

While the major function of training for mission DIC directors can be incorporated into the ODIS project, there will be obvious implications for other CDIE staff, especially when orientation training is conducted in Washington. Similarly, such initiatives as the arranging of Washington briefings for TDY personnel or staff heading for a new post will make demands on regular CDIE operations, even if coordinated by ODIS.

Thus, the well-developed and varied information resources of CDIE will have substantially more demand made on them as a result of an ODIS initiative. Since use is the purpose for which these resources have been developed, this eventually should be welcomed. But capacities may be strained, and this reality could result in significant resource demands on CDIE.

Mission Commitment and Support

ODIS success in a particular USAID mission depends, above all, on commitment to the importance of information as a resource by the mission director and those on the director's staff with the greatest need to use development information. These staff usually include evaluation officers; project design officers; others centrally involved in a mission's own learning process; or, not infrequently, AID contractors on long-term project implementation contracts. To make ODIS work, this commitment should be translated into support for the information brokerage

function, usually to be performed by a staff person linked to a mission DIC. The costs of this support are measured in staff time and budgeted funds.

The staff time issue has two dimensions: DIC management and DIC supervision. In the typical case, one or two Foreign Service nationals or dependents will be needed to manage DIC functions. These staff usually are funded out of mission O and E money, but some missions will consider the use of program (PDS) funds if the link to programmatic purposes (that is, project development or outreach to host-country institutions) is clear. DIC supervision should come from mission staff with information utilization concerns -- usually the program office. Although the time demands of this supervisory function need not be large, the importance of the function is substantial. Supervisory personnel not only provide guidance to DIC staff but also have a role to play in protecting the DIC's interests when there are competing claims for space, resources, and staff. In some cases, a program-related officer may personally be designated to fulfill the DIC information brokerage and networking function. This is rarely feasible in view of the time demands on these staff.

Apart from staff, the budget implications of a DIC for a mission are small. In Haiti, a medium-sized mission, an immediate catch-up budget of under \$1,000 was recommended for supplies and equipment. A third of this was designated for a microfiche reader, the need for which was eliminated when an unused one was found in the mission warehouse. (The question of whether any microfiche reader can be cost-effective remains to be tested: AID/Indonesia has a reader that is never used.) An additional budget of \$400 was approved for the addition of basic reference works. For FY 1986, an operating budget of under \$1,700 (not including salaries) was recommended for acquisition of books

and periodicals, library supplies, outreach materials (such as brochures), and communications. These are small amounts in this mission context and were readily approved.

Other possible budgetary implications include the probable need for a dedicated microcomputer, plus telecommunications costs associated with international information transfer, and these would need to be determined on a case basis.

CHAPTER FIVE

SUMMARY OF RECOMMENDATIONS

Based on the findings and discussion above, this section summarizes major recommendations arising from this task order as a basis for determining an action plan for ODIS project implementation.

ODIS Program Priorities

- The primary focus during at least the inaugural two or three years of any ODIS project should be on the upgrading of the internal capacities of AID to promote more effective use of available development information resources in the support of its larger mandate. Although programmatic outreach to developing country institutions remains an important goal that should be pursued as circumstances warrant, the challenges within AID itself are sufficiently great that these activities should not be allowed to divert the ODIS project from its important first priority.

Upgrading Mission Information Brokerage

- The mission-level development information brokerage function is distinct from, and must be conceptually separated from, traditional library functions. Information brokerage means links to appropriate information networks and an orientation toward the marketing and timely delivery of relevant information to those who need it. This is the basic concept that must undergird any ODIS project implementation.
- Key mission-level clients for information support are those staff responsible for strategy and program development. In addition to the mission director, these staff usually include the mission economist, project development officer, evaluation officer, and others in the program office or its equivalent. ODIS project implementation should be geared to the interests and needs of these people.

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- Improving the management and use of mission development information will normally require a staff person specifically charged with the information brokerage function. This person should be supervised by a program or other officer with project development responsibilities. In some instances, this officer might personally fill the information brokerage function.
- Where mission conditions warrant, local information collections should be developed that are geared to specific mission strategic and project priorities. A dedicated microcomputer with bibliographic index software such as MicroDIS has the potential to be a space-saving and cost-effective tool for local collection management.

Outreach

- The ODIS project should have a fundamental orientation toward user services -- technical assistance, reference, research, and outreach -- geared to a recognition of the needs of various information users. And potential users should be prioritized, to ensure appropriate project focus.
- ODIS and, subsequently, DIC staffs will need to launch an effort to inform mission personnel of the products and services that can be made available through CDIE and ODIS.
- DIC staff need access to key mission personnel, important planning documents, and relevant mission communications to fulfill outreach functions effectively at the local level.
- Outreach in the mission context requires proactive DIC leadership that will anticipate the information needs of program and project staff, and use a variety of AID and non-AID information sources to acquire what is needed in a timely fashion.

Training Section

- A human resource-centered approach to overseas information support places great importance on training and motivation, especially for staff responsible for managing the mission development information center (DIC). The training focus should be on outreach, networking, reference activities, and general user services.

- It is equally important that key mission personnel also are trained and motivated to make the most effective possible use of available information resources. This training should focus on user awareness, mechanisms to access information resources, and the value of information in improving the quality of AID's work.

CDIE Support to the Field

- Developing site-specific local information management capacity, combined with an enhanced mission awareness of the value of good information effectively used, represents the major contribution CDIE can make to good management and use of AID's institutional memory and other development information resources in field-level project design and implementation.
- Outreach in the CDIE context requires anticipation of mission needs through review of relevant program documents (including country development strategy statement, annual budget submission, and action plan) and participation in mission program review and other meetings, and then preparation of information packages geared to key potential users such as mission economists and project design and evaluation officers. Anticipatory preparation of generic materials of value to several missions pursuing similar program objectives (for example, design of fragile lands management projects) also can be useful.
- Key factors in CDIE support to USAID missions include technical assistance; responsive, timely, and high-quality document and research services; economic and social data and analysis; technology transfer; service promotion; and, in some areas, regional information management support.
- In the context of an ODIS focus on local information brokerage, CDIE assistance in data collection and analysis methodologies, supported by the development of economic and social databases by the Evaluation Applications and Statistical Analysis Division (EASA), should be designed to serve mission use of evaluation and other information for project development.

- CDIE should also strive to assist USAID missions indirectly through increased linkages with and direct support to other AID/Washington offices, especially the Bureau for Science and Technology and the Regional Bureau offices of Technical Resources and Development Planning.

Management Initiatives

- CDIE should anticipate a substantial increase in research requests as a result of ODIS initiatives. This will require increased DI staff or systems to establish priorities and ration responses. Mission DICs should play a role in filtering requests to ensure clarity and specificity and to reflect local priorities.
- A position classification scheme for mission DIC staff is needed that is appropriate to the requirements of information brokerage and outreach, rather than the library functions incorporated in Library of Congress and United States Information Service position classifications now used in most missions.
- Monitoring and evaluation criteria for ODIS activities should include the number of active DICs developed and sustained, the number of field requests for information, user evaluations of CDIE products, evidence of information use in mission project documents, and successful technology transfer.
- Priority should be given to preparation of a DIC procedures manual for USAID missions. This manual should be designed in a form that allows for customization for local circumstances and frequent modification.
- Arrangements should be made in the short term to enable follow-up on initiatives begun during ODIS pilot test work in Haiti, both to help consolidate progress already made and to enable more rigorous evaluation of impact than was possible during the pilot test time frame.

The ODIS Project

- Key factors in assessing the mission environment for development information acquisition and use include staff (and training), information resources, facilities, budget, mission support, available technologies (and capacity to use them), and access to local non-AID information resources.

- CDIE management and ODIS project staff will need to remain aware of the dual, and sometimes ambivalent, role that ODIS staff will be called on to play. This role is simultaneously entrepreneurial and advocatorial. ODIS project personnel will need to be salespersons for existing CDIE products and services to USAID missions, advocates of change in those products and services to make them more responsive to field needs. There are no unresolvable contradictions in this: it serves only to emphasize the inherent complexities of the undertaking, and thus to reinforce the quote from W.J. Siffin that introduces this report.

CHAPTER SIX

IMPLICATIONS FOR IMPLEMENTATION

The implementation plan for an ODIS project presented in the original strategy paper remains valid. Major features of that plan included the following:

- The ODIS project should not be separated, either functionally or substantively, from the operations of PPC/CDIE/DI in order that ODIS functions ultimately be folded into ongoing AID operations as a self-sustaining and self-contained program. However, ODIS staff should be separate from the DI Research and Reference staff so that they will be able to serve as advocates for mission needs and for changes in all CDIE services to make them more responsive.
- The project should be implemented in three phases over a five-year period, using contracted services for that period. The project should be under the supervision of CDIE/DI and work in close cooperation with other related contracted services of that office (DIHF, Research and Reference staff, etc.).
- The ODIS project should not be implemented as if it were only a dissemination activity. Instead, it should focus its energies and resources on developing local capacities to acquire and manage information in USAID missions and counterpart institutions. In addition, an essential component of any such orientation must be continuing efforts to ensure the best possible system responsiveness to existing and future development information needs. Thus, the ODIS project will be involved in efforts to improve the relevance and responsiveness of CDIE products and services. (This issue is discussed at length in the original strategy paper.)
- The larger context of ODIS implementation--over which the project will have relatively little control--will be critical to its success. Important issues include AID policy initiatives to legitimate effective use of the AID institutional memory, the ability of CDIE to respond to the expected large increase in field demand for its information services, and AID support for the continuing development and improvement of those services. Although control will reside outside the program, effective implementation of ODIS activities should have some impact on the evaluation of relevant policies. Therefore,

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notwithstanding the degree to which these matters may lie beyond its direct control, the success of the project should be measured, in part, by the degree of positive change in these policies (and their implementation) during the life of the ODIS project. (Specific policy and management initiatives are reviewed in the final portion of this section of this report.)

Details of the recommended implementation plan and a revised project budget, incorporating changes and additions from the Haiti pilot project and the other task order activities indicated in this report are contained in the following sections. A project logframe is attached as Annex 1.

REVISED IMPLEMENTATION PLAN

It is recommended that the principal activities of the ODIS project during each of its three phases be as outlined below.

Phase One

This phase will last for approximately six months from the time the contract is signed. During this period, all activities that will form the basis for subsequent project implementation should be inaugurated. These include:

- Hiring Washington-based project staff, consisting of a project director, two regional coordinators, two training/technical assistance staff, and an administrative assistant. Recommended job descriptions for these positions are enclosed as Annex 7 to this report;
- Acquiring and occupying office space, preferably within or immediately adjacent to the existing PPC/CDIE/DI offices and provided without cost by that unit. Computer terminal access to the DIS should also be provided;
- Purchasing with project funds and installing the automated terminal hardware and software that will be required for project implementation. One or more separate telephone lines will also be needed;

- Joining, with PPC/CDIE and other pertinent AID bureaus, in the ongoing dialogue regarding how best to organize the collection, management, and processing of the full range of AID's institutional memory so that it can best serve the needs of AID-connected overseas users. This agency-wide dialogue should continue throughout the life of the project and beyond;
- Developing with CDIE (especially the DI Research and Reference Service) contingency plans and strategies for dealing with the large increase in demand for its services from USAID missions that the ODIS project will generate;
- Selecting a minimum of three mission sites in each of AID's geographic regions for ODIS project Phase Two implementation. For continued learning, it might be preferable to have these sites span the range from information-rich to information-poor. Selection criteria for test sites should include:
 - A demonstrable degree of mission interest in the use and management of development information (both internally and programmatically), and
 - A willingness to provide financial and administrative support to the establishment or strengthening of a local DIC function, particularly in the form of qualified staffing;
- Developing procedures for inaugurating proactive provision of field-relevant information products and services to field missions. This would include the development for all selected missions program profiles and, based on the profiles, site and program-specific information packages for dissemination from CDIE. It also would include procedures for linking ODIS and DI personnel to mission support activities within AID/Washington, including participation in annual country program justification and approval meetings (Directors' weeks) and the provision of inputs to PID and PP review meetings;
- Testing and contribution to the selection of technologies (especially software) for dissemination to missions and, later, to participating institutions in developing countries;
- Organizing the training and technical capabilities that are likely to be called on to provide technical assistance to participating missions; and

- Developing and expanding on arrangements for access to other pertinent databases.

Phase Two

Phase Two of the project will last for approximately two years. During this period, implementation should proceed on the basis of groundwork laid during Phase One, and many of the activities begun then will continue. The most important of these will be:

- Implementing ODIS initiatives in the selected USAID missions. Although a minimum of nine USAID test sites are specified above, more may be approved for participation at the discretion of the project director if field interest is sufficiently high, if the project director believes the project can support an increased level of effort, and if CDIE can provide effective backstop support. Implementation during this phase will focus on provision of technical assistance and training support to missions in support of the development of effective local information availability and use. Missions would be expected to provide space, personnel, and the necessary management commitment to the project objectives of outreach-oriented, mission-based development information management and dissemination capabilities;
- Providing continuing feedback to CDIE regarding mission information needs and expectations, and assisting CDIE in defining appropriate response procedures and packages;
- Monitoring evolving information management techniques and information technologies for potential application in ODIS project activities;
- Engaging in appropriate outreach activities, both at project sites and other locations, to facilitate project expansion as rapidly as system capabilities will allow;
- Evaluating the project and modifying strategies accordingly, including the establishment of guidelines for evaluating mission-level programs and determining levels of continuing support;
- Preparing for general replication of field sites according to established criteria that should include:

- The level of USAID mission institutional interest, as indicated by current information-related programming and by a willingness to cost-share local inputs, and
- The capacity of CDIE and the ODIS project to support an expanding level of effort;
- Nomination, by missions, of developing country counterpart institutions for participation in Phase Three implementation. Selection criteria should include:
 - The nature of the established relations between the institution and the USAID mission in the country,
 - The degree of interest expressed by the institution and its potential for meaningful utilization of the enhanced capabilities that the ODIS project would help it acquire, and
 - The potential value of improved information services to the institution and its clientele.

Phase Three

The third and final phase of the ODIS project should last for approximately two and one-half years until the end of the project's proposed five-year contract period. Specific activities of Phase Three will include general expansion of DIC-related technical assistance and training to as many missions as ODIS and CDIE capabilities will allow. Project activities from the earlier two phases will be continued, with particular focus on helping USAID missions to manage their own information systems and access the information networks (AID and non-AID) with which they have been linked. Attention should also continue on project contributions to the ongoing effort to enhance the relevance and accessibility of AID's own institutional memory.

New activities during Phase Three will focus on issues of programmatic outreach by missions to support information initiatives by host-country counterpart institutions. This activity will begin selectively, but should have the objective of

strengthening the support system to the point that it can ultimately incorporate all those participating institutions in developing countries that USAID missions are prepared to support programmatically.

Within this context of project expansion, the primary focus during Phase Three must be on institutionalizing and internalizing the system as a continuing part of AID's program operations, that is, on ensuring sustainability of the effort following termination of special project-funded status. This will require attention to providing continuity in management and resource commitments and thus to ensuring integration of effort within CDIE, at the AID/Washington bureau level, and among individual participating USAID missions. The exact nature of this effort will depend on the way the program has evolved during its first two phases and should be a major focus of project management.

REVISED ILLUSTRATIVE BUDGET

The following budget is premised on the recommendations presented in this report. Many of these recommendations concern the integration of the ODIS project into ongoing CDIE activities and thus assume the availability of financial and other resources outside the project budget to contribute to the accomplishment of project objectives. The following budget is intended to be generally indicative of the level of new funding that is likely to be required to enable the project to meet the objectives outlined for it in this report.

The illustrative budget suggests general funding levels for each of the project's five years, broken down broadly by categories of expenditure. Certain important assumptions underlie compilation of this budget:

- Positions for the project director, regional coordinators, and administrative assistant will be filled for the entire five-year term of the project. The two technical assistance/training staff will begin with Phase Two. Initial salaries will be on the order of:

Project director:	\$55,000
Regional coordinators (2):	35,000
Technical assistance/training staff (2):	25,000
Administrative assistant:	15,000

For planning purposes, it is estimated that fringe benefits will load these base salaries by an average of 30 percent and that contractor overhead and fees will add an additional 90 percent of salaries plus fringe benefits. It is also assumed that salaries and fringe benefits will increase annually at an average of 6 percent.

- An average of 12 international project-related trips will be made annually, some by project staff, others by CDIE staff, and still others possibly by personnel working in project-assisted DICs. This travel is budgeted at an average first-year cost of \$3,000 per trip for travel costs. This travel will also involve a total of 360 days of per diem per year, at an average first-year cost of \$100 per day. A 5-percent inflation factor is assumed for the second through fifth years of the project.
- It is anticipated that other travel in support of ODIS project objectives will also be made funded from non-project budgets, especially from DI operational funds and/or Research and Reference Service and DIHF contract funds.
- Significant financial and other support will be provided to the project from outside the project itself. This includes office space and facilities from CDIE/DI, technical assistance and support personnel from DI, access to the DIS, and mission support. ODIS project funds will be largely supplementary and are intended to support project outreach functions, primarily technical assistance services, communications, and training materials.
- The project will require access to a Wang work station integrated into current DI and DIHF activities and project funds are designated for this. Microcomputers for field use, where needed, should be funded by missions. Equipment needed for mission programs with developing country institutions should be included in individual local project budgets.

- Funds are allocated in the budget to provide discretionary project support to participating USAID missions, particularly to assist missions in dealing with whatever problems may arise during project implementation. These funds might be used, for example, to enhance especially important local materials collection. These funds would not normally be available to underwrite ongoing operating costs although consideration could be given to emergency support for a short period to prevent the kind of temporary DIC staff cut required in Haiti due to an O and E funds shortfall at the end of FY 1985.

The illustrative budget appears in Table 1.

AID POLICY AND MANAGEMENT INITIATIVES

There are many important policy and management issues relating to AID's more effective use of the development information resources that lie beyond the scope of this project to directly affect it. Given their immediate relevance to the issues addressed in this report, the following section summarizes these issues as seen from the ODIS perspective.

An unequivocal commitment by top AID management to make more effective use of AID's institutional memory and other relevant development information would do more than anything else to ensure the success of ODIS project initiatives, provided that this commitment were buttressed by the regulations and procedures that would be required to make it stick. If this commitment were made, it would be manifested in such ways as the following, summarized from the original strategy report.

AID/Washington

- Issue a policy statement dealing with the use of development experience that establishes the parameters of AID's role and interest in the subject.

TABLE 1

ILLUSTRATIVE BUDGET
(in thousands of dollars)

Line Items	Year 1	Year 2	Year 3	Year 4	Year 5	Total
A. Personnel						
1. Base Salaries	165,000	201,400	213,500	226,300	239,900	1,046,100
2. Fringe Benefits (30%)	49,500	60,400	64,100	67,900	72,000	313,900
B. Travel	72,000	75,600	79,400	83,300	85,500	395,800
C. Mission Support						
1. Communications	2,000	2,100	2,200	2,300	2,400	11,000
2. Supplies	2,000	2,100	2,200	2,300	2,400	11,000
3. PR/Outreach	5,000	7,000	6,000	9,000	8,000	35,000
4. S.T. Training/TA	10,000	40,000	10,000	20,000	10,000	90,000
D. System Development						
1. Software purchase	2,000	1,000	1,000	1,000	1,000	6,000
2. Systems development	10,000	5,000	5,000	5,000	5,000	30,000
3. Equipment purchase	20,000	10,000	10,000	10,000	10,000	60,000
E. Overhead and fee (90% of A)	193,100	235,600	249,800	264,800	280,700	1,224,000
F. Totals	530,600	640,200	643,200	691,900	716,900	3,222,800

- Issue guidelines supporting and assisting the development of effective mission information centers, including position classifications that support the hiring of outreach-oriented information specialists.
- Improve the lessons-learned focus of synthesis and other materials, emphasizing elements of interest to policy makers as well as project designers and managers.
- Require staff responsible for proceedings of sector workshops or other topical discussions involving AID staff or outside experts to prepare short summaries similar to evaluation syntheses.
- Provide career incentives for demonstrated use of lessons learned in program and policy design and management.
- Require strategy and project approval processes at all levels to take incorporation of documented lessons learned more seriously.
- Require authors of project papers, evaluations, and other project-related reports to include a standardized abstract emphasizing lessons learned.
- Adapt project completion reports, project implementation reports, and USAID comments on evaluation reports to make them more useful in terms of lessons learned.
- Establish procedures to encourage better document capture by the DIS, including requirements that AID project and desk officers forward copies of all project-related documents to DI.

USAID Missions

- Increase emphasis on documented use of lessons learned in project development, design, and approval processes.
- In conjunction with the ODI, project, strengthen or create mission development information centers under senior program-level supervision to oversee and manage information collection, cataloging, and use.
- Require project officers to forward all project-related documents to the DIS, through mission DICs where these exist.

Contractors

- Structure contracts for consultants to require and facilitate investment of time (in Washington when possible) to review information relevant to their assignment.
- Require contractors to perform a DIS search prior to preparation of project identification documents, project papers, policy analyses, and other studies.

ANNEX 1

OVERSEAS DEVELOPMENT INFORMATION SUPPORT

ANNEX 1

OVERSEAS DEVELOPMENT INFORMATION SUPPORT

Logical Framework

<u>Narrative Summary</u>	<u>Indicators</u>	<u>Means of Verification</u>	<u>Important Assumptions</u>
Goals: To improve the exchange of development-related information between AID/Washington, USAID missions, and selected counterpart institutions in developing countries	Improved access to and use of development-related information in program and project design, implementation, and evaluation by AID, USAID missions, and their counterparts	Existence of established and accepted means of information transfer Evidence in project-related documents that relevant information has been used as a resource	A. There are important differences between the task of developing an information archive and the task of supporting effective information management and use.
Purposes:			B. Effective information use in the field is not dependent on the presence of hard-copy or microfiche library collections.
A. To utilize AID's institutional memory (lessons learned) and other development information resources to improve USAID mission capacities for project design, management, and evaluation	Evidence that the lessons of experience are incorporated in project planning and implementation	-Project documents -Project evaluations	C. Effective information management and use in the field is a programmatic issue with a direct link to the quality of program design and implementation.
B. To provide access to information that many developing countries cannot afford to produce, buy, or publish	Programmatic outreach from USAID missions to counterparts to provide information not previously available to them	-Mission CDSS statements -Annual budget submissions -PIDs, PPs, and other planning documents	D. Assisting LDC institutions to improve access to and management of information is primarily a mission-level programmatic concern.
C. To provide assistance in the development of LDC institutional capacities to access and use information	Mission programs to build local capacities for information management and use	-CDSS statements -PIDs, PPs, and other planning documents	E. The effectiveness of CDIE field support is directly related to the environment of management, policy, and incentives from AID management.
D. To improve links between development research and program/project implementation	Established mechanisms for incorporating information into project management	-AID policy guidance -DI procedures -Mission capacity and procedures for information use	

Outputs:

- | | | |
|---|--|--|
| <p>A. Development and improvement of USAID mission development information management and use</p> | <ul style="list-style-type: none"> -Increased emphasis on information use by mission management -Functioning mission development information centers | <ul style="list-style-type: none"> -Status of mission development information centers -Mission records |
| <p>B. Timely and appropriate response to field requests for processed information or documents</p> | <ul style="list-style-type: none"> -Shortened time between requests and fulfillment -Better quality and targeting of responses | <ul style="list-style-type: none"> -DI records -User feedback |
| <p>C. Provision of broad, user-oriented development information reference services, accessing AID's institutional memory and other relevant information sources</p> | <p>Improved synthesis material, topical summaries, and customized responses to field requests</p> | <ul style="list-style-type: none"> -DI system outputs |
| <p>D. Technical assistance to mission information management initiatives and to their host country counterparts</p> | <ul style="list-style-type: none"> -Project activities in mission support -Effective performance by project regional coordinators | <ul style="list-style-type: none"> -Mission feedback -Project records -Mission support to local information centers |
| <p>E. Development or adaptation of improved technologies for automated information access and management</p> | <ul style="list-style-type: none"> -Existence of systems appropriate for mission and local counterpart use -DI programs in technology assessment | <ul style="list-style-type: none"> -Systems installed and used -Technical reports -Mission-level terminals and system use |

Inputs:

- | | | | |
|---|---|--------------------------|--|
| <p>A. Project staff</p> | <p>Six staff as per implementation plan</p> | <p>Project documents</p> | <p>F. CDIE will provide effective guidance, backstopping, and technical support to project staff and activities.</p> |
| <p>B. Project funding</p> | <p>\$3.138 million as per budget</p> | <p>Project documents</p> | |
| <p>C. AID/Washington and mission technical and management support</p> | | | <p>G. Project funding will be available</p> |

ANNEX 2

USAID HAITI PROGRAM PROFILE

ANNEX 2

USAID Haiti Program Profile

1 Focus of Action Plan Strategy

- o Natural resource degradation and related decline in agricultural production;
- o Inadequate private sector employment opportunities; and
- o Weak human resource base.

2 Program Objectives (% of DA funding)

2.1 Agriculture and Rural Development (50%)

1. Reduce and ultimately reverse the process of deforestation and soil erosion, especially on hillsides: arrest siltation, prevent flooding, restore hills' capacity to retain and store rainwater.
2. Increase agricultural production of commodities that maximize Haiti's comparative advantage and improve access of the poor to a reliable and adequate food supply.

Program elements include targeted watersheds, improved technology generation and dissemination, institutional development, and policy dialog.

2.2 Human Resource Development (46%)

1. Education (2%): Upgrade primary education in rural Haiti.
2. Population (12%): Promote the establishment and implementation of policies supporting lower fertility and expand rural non-farm employment activities to reduce fertility.
3. Health (32%): Improve basic health and nutritional status of population, especially children, and thereby reduce high rates of mortality and morbidity.

Program elements include:

1. Education: Improve nutritional levels for pre-school and primary children, provide professional and vocational training in priority development areas, and upgrade primary education in rural Haiti

2. **Population:** policy assistance, promoting adoption and use of broader range of population control techniques, increasing involvement of NGOs, and institutional support to Division of Family Health and Ministry of Plan, especially in research and reporting.
3. **Health:** primary health care promotion, immunization assistance to decentralization of MOH activities, assistance to MOH in automation, operational research and evaluation activities to assess alternative delivery approaches, study of user fee potentials, and construction and rehabilitation of potable water sources.

2.3 Private Sector (new)

1. Develop credit institutions providing term loans to small and medium businesses as well as mortgage loans to low and moderate income families.
2. Assist a GOH Presidential Commission (to become an Investment Authority) to formulate policies and procedures conducive to industrial development and growth.
3. Establish a Private Enterprise Management Center to provide management and technical support services to private businesses.
4. Generate employment through promotion of industrial and agricultural development.

Program elements include strengthening the management and operational systems of credit institutions, providing capital for financing micro enterprises, export and investment promotion, and support for non-traditional exports.

2.4 Urban Development (<2%) *

1. Improved urban planning
2. Generation of employment opportunities
3. Development of policies supportive of labor-intensive production technologies.

Program elements include development of small-scale credit institutions, policy support in area of industrial development and growth, creating a Private Enterprise Productivity Center to provide management and technical

support to the private sector, and supporting the establishment of an Investment Authority to promote investments geared to domestic and export markets.

2.5 Environment/Natural Resources (<2%) *

1. Reduce and ultimately reverse the process of deforestation and soil erosion
2. Provide off-farm employment opportunities to reduce the need to farm marginal hillside lands

Program elements include reforestation, labor-intensive approaches to road maintenance and other rural infrastructure projects, soil conservation and watershed management, upgrading of management, production, and processing practices in coffee farming and marketing, promoting the adoption of higher-yielding seed varieties, encouragement of upland livestock production, and use of radio extension programs.

2.6 Energy (<2%) *

1. Promote market pricing for energy supplies
2. Mobilization of small farmers to plant fast growing trees to meet fuelwood needs

Program elements include technical assistance to the Energy Ministry to identify new approaches to energy supply including conservation measures and alternative energy sources

* in CDSS but included in other program sectors in FY 86-87 Action Plan.

3 Areas of Priority Development Concern

3.1 Policy Dialog

- o Improving the budgeting of recurrent costs
- o administrative decentralization
- o Tax burden sharing (away from levies on export crops and taxes on food imports)
- o public and private cooperation (especially to increase role of NGOs in development)
- o Agriculture market structure improvement

3.2 Private Sector Development

- o Establishment of mission office of Private Enterprise Development (1981)
- o Development of intermediate credit institutions (agriculture, housing, etc.)
- o Caribbean Basin Initiative (inputs for local and foreign industrial and agro-industrial enterprise)
- o Other elements: Private Enterprise Productivity Center, Investment Authority, non-traditional exports (agro-industry, handicrafts)

3.3 Institutional Development

- o Government institutions (Bureau of Agric. Credit, Ministry of Health and Population)
- o NGOs

3.4 Technology Transfer

- o Agricultural productivity technologies and farming systems
- o Livestock programs
- o Health and population
- o Rural infrastructure
- o Energy conservation and alternatives

4 Research Priorities Initiative

4.1 Agricultural Research

- o Center for Agricultural Research and Documentation (1983)
 - under umbrella of national agricultural university.
 - coordinates all agricultural research activities and for carrying out adaptive research
- o Hillside agriculture focus
 - environmental management techniques and systems
 - farming systems and production technologies
 - crop and animal protection

4.2 Health and Population Research

- o malaria parasite sensitivity to anti-malarial drugs
- o program management and design research encompassing primary health care, malaria control, and family planning

5 New and Proposed Projects

5.1 EX 1987

- o Local Resource Development (4 yrs. \$12 million)
 - purpose: to support an institutional structure for the efficient delivery of local services based on the principles of participatory development and decentralized planning and administration
 - outputs: decentralized Ministry of Plan Regional Development Authorities; water/soil resources development; a Participatory Development Fund to support dialog with beneficiaries; and research into irrigation sociology, rural development participation, and farming systems.
- o Coffee and Cacao Production (4 yrs. \$4 million)
 - purpose: to pursue Haiti's comparative advantage for export-oriented, soil conserving, tree crops by reinforcing their public and private sector support institutions for research, extension, and the promotion of market incentives (especially OFRODEX - Agricultural Export Institute)
 - outputs: policy analysis; production, research/extension, and market promotion; and research into impacts of export tax policy on farm-level production and income
- o Population for Development (4 yrs. \$0.8 million)
 - purpose: create broad multidisciplinary support for national population policies that strengthen economic and social development in Haiti
 - outputs: strengthened governmental and private sector capacity to undertake operational studies on population factors in development; and stimulation of awareness and support among Haitian leaders for national public policies on population growth
- o Private Enterprise Management Center (3 yrs. \$2.5 million)

- purpose: provide management training and other support elements to entrepreneurs to support private sector business development
 - outputs: creation of a private sector management training and project packaging service center
- o Nontraditional Export Development (3 yrs. \$2.5 million)
- purpose: increase opportunities for rural and urban employment and identify new sources of foreign exchange by increasing handicraft share of current exports
 - outputs: design and manufacture of hand-made products for high value market in US
- o Investment Authority (4 yrs. \$2.5 million)
- purpose: integrate public/private sector export and investment promotion efforts in Haiti by providing a one-stop investment service and by identifying and securing new investment opportunities
 - outputs: organization of information workshops concerning new investment opportunities resulting from the CBI and the improvement of procedures for processing documentation and assisting in identifying necessary industrial infrastructure for investors.
- o NGO Support III (1 yr. \$3.4 million)
- activities include aquaculture development, ceramics development, seed multiplication, Factory Women's Resource Center, family planning, conch breeding, community development, and sisal rug feasibility studies.

5.2 FY 1986

- o Targeted Watershed Management I (10 yrs. \$35 million)
- purpose: to transform existing patterns of land use and agricultural production on the hillsides of five adjacent, high potential catchment basins in three watersheds to reverse the trend of environmental degradation and prevent the loss of their productive capacity
 - outputs: watershed technical information service, program development, and management planning; local peasant-level organizational development and institutional strengthening for the creation of

hillside conservation units and water users' associations; and technology transfer, soil conservation, and farming system establishment to implement improved hillside production on selected "demonstration sites."

o **Ag Development for Small Communities** (2 yrs. \$1 million)

- purpose: to organize farmers in key watersheds into local associations capable of operating and maintaining agricultural infrastructure and procuring appropriate production inputs
- outputs: increase in farmer incomes and the building of local development institutional capacity

o **Rural Information Systems for Policy Analysis** (4 yrs. \$2 million)

- purpose: reinforce the capacity of the National Statistical Institute to undertake an ongoing program of data collection and analysis in the rural sector
- outputs: capability within the Ministry of Plan to collect, assess, and analyze data on the subjects of household production and consumption, employment and manpower, and related areas; national and household surveys will be undertaken and research in data collection procedures performed.

o **Agricultural Outreach Development** (4 yrs. \$5 million)

- purpose: increase farm income and enhance on-farm consumption through the application of more cost-effective technology
- outputs: strengthened private and public sector institutions involved in agricultural extension; development and dissemination of technological packages that impact on the sector's long-term capacity to produce and make available food, fiber, and other agro-industrial products.

o **Soil Conservation and Irrigation Management** (5 yrs. \$10 million)

- purpose: to increase farmers' incomes and the local production of food crops through an improvement in Haiti's capacity to undertake soil and water management
- outputs: mobilization and training of local associations for upstream protection (through soil conservation) of irrigation infrastructure; the strengthening and decentralization of the MOA by reinforcing

district-level offices to manage watershed projects; and identification and implementation of appropriate policy, technical, and organizational changes

o Private Family Planning Resource Center (4 yrs. \$2 million)

- purpose: to create a resource center to encourage, support, and coordinate private sector family planning activities through the Haitian Family Planning Association (PROFAMIL).
- outputs: development of a private family planning resource center to coordinate FP information, service, and operational research; provide support through subgrants to private groups; promote awareness of the impact of population growth on the environment and socio-economic indicators; and serve as a reference facility on population/family planning matters accessible to the public

o Targeted Community Health Outreach (4 yrs. \$13 million)

- purpose: to strengthen the capacity of the MOH to plan, implement, and evaluate targeted programs to resolve efficiently and cost-effectively priority public health programs.
- outputs: management improvement through MIS development for administrative service and impact data; skill development through training; enhanced use of community and private resources; operational research to identify and help resolve critical impediments to service delivery and impact; and targeted health information and education.

o Expanded Malaria Control (4 yrs. \$19 million)

- purpose: to help the GOH implement targeted cost-effective malaria control activities
- outputs: expanded epidemiological surveillance and activity evaluation; enhanced utilization of community volunteers for case treatment, public IEC, and community self-protection activities; MIS development; and continued operational research to evaluate program performance, monitor parasite response to control measures, and expand use of appropriate new technologies.

o Incentives to improve primary education (3 yrs. \$10 million)

- purpose: upgrade primary level education in rural areas

- outputs: support to US and Haiti based PVOs engaged in primary education

o NGO support IV (1 yr. \$4.65 million)

- activities include development of a Haitian Trade and Finance Co., coastal fisheries development, and primary health care services

5.3 FY 1987

o Hillside Farming Outreach (10 yrs. \$30 million)

- purpose: to change the production patterns of hillside farmers through the mobilization of PVOs in target watersheds to organize farmers for the implementation of soil-conserving, income-generating hillside farming technologies
- outputs: funding of one or more coordinating PVOs to make subgrants to local PVOs; maintaining a central hillside/soil-conservation resource center offering technical site analysis services and serving as a clearinghouse for technical information; and providing grantees with field services and technical assistance in the implementation of local hillside/sub-watershed improvement initiatives

o Targeted Community Health Outreach (5 yrs. \$13 million)

- purpose: to increase access of rural Haitians to cost-effective primary health care services directed at the primary causes of mortality and morbidity by strengthening the capacity of public and private sector health institutions to plan, implement, and evaluate services; to increase the financial self-sufficiency of health care institutions; and to reallocate public and private resources to address major health care problems
- outputs: exploration of health cost recovery through fee-for-services and drug sales; consolidation of decentralized program budgeting; enhanced health management information systems; expanded health education and in-country training; operations research activities; and immunization

o Agribusiness and Rural Enterprise Expansion (4 yrs. \$3 million)

- purpose: to increase employment in the rural areas of Haiti through stimulating private sector investments in agribusiness and rural enterprise projects

- outputs: training and advisory services through the Management and Productivity center (MPC); research services on production processes; credit services through the existing Development Finance Corporation or Haitian Development Foundation; marketing assistance

5.4 Other Projects with Information Components

- o Rural Health (FY 79-85 \$16 million)
 - collection of baseline data on infant mortality and incidence of diseases and malnutrition among children
- o Agricultural Development Support II (FY 78-84 \$4 million)
 - research and statistics; analysis and dissemination of data
- o Resource Training Center (FY 80-84 \$1.5 million)
 - establishment of Resource Training Center to disseminate information on successful training approaches through publications
- o Agroforestry Outreach (FY 81-85 \$11.5 million)
 - collection of data on forestation in Haiti; establishment of Agroforestry Research Center
- o Groupement Pilot Projects (FY 80-84 \$8.425 million)
 - baseline and end-of-project surveys on effectiveness of small peasant self-help groups
- o Management of Malaria (FY 82-87 \$8 million)
 - epidemiological analysis of data to determine severity of malaria in selected areas
- o Technical Consultants Training (FY 83-85 \$1 million)
 - design and testing of a management information system
- o Radio Agriculture Extension Programming (FY 85-86)
 - radio broadcasts to disseminate agricultural information and technology
- o Agroforestry Outreach II (FY 85-88 \$3.5 million)
 - establishment of a technical data base on different tree species to compile a technical resource guide

6 Evaluation Schedule

6.1 FY 1986

- o Agriculture: Agroforestry Outreach, Interim Swine Repopulation, and Goat Improvement
- o Private Sector: Development Finance Corporation
- o Human Resource Development: Urban Health/Community Development II, Family Planning Outreach, Rural Health Delivery Systems, Community Health Outreach II

6.2 FY 1987

- o Agriculture: Strengthening Rural Credit Services, Local Resource Development
- o Private Sector: Haitian Development Foundation, Crafts Export Promotion, Management and Productivity Center, Haitian Mortgage Bank
- o Human Resource Development: Primary Education, Employment Skills Training

Summary Program Funding Table

PROJECT TITLE	L / G	PROJECT NUMBER	FY INL ORL	FY FNL OBL	TOTAL PROJECT AUTH	TOTAL PROJECT COST PLANNED	ESTIMATED OBLIGATIONS FY 85	PROPOSED OBLIGATIONS FY 86	PROPOSED OBLIGATIONS FY 87
* AGRICULTURE, RURAL DEVELOPMENT AND NUTRITION									
PROGRAM DEVELOPMENT AND SUPPORT	G	521-0000	73	C	---	---	250	250	250
INTEGRATED AGRICULTURAL DEVELOPMENT	G	521-0078	76	85	9,290	9,290	1,075	---	---
INTEGRATED AGRICULTURAL DEVELOPMENT	L	521-0078	76	76	2,800	2,800	---	---	---
AGRICULTURAL DEVELOPMENT SUPPORT II	G	521-0092	73	89	3,308	5,392	352	1,242	1,200
STRENGTHENING RURAL CREDIT SERVICES	G	521-0121	81	87	4,500	5,500	1,900	300	315
AGROFORESTRY OUTREACH	G	521-0122	91	90	11,300	21,500	3,000	2,633	3,000
SECONDARY ROADS DEVELOPMENT	G	521-0149	83	88	12,500	12,500	2,400	---	2,000
COMMUNITY WATER SYSTEMS DEVELOPMENT	G	521-0155	84	87	6,000	6,000	1,389	2,000	2,000
LOCAL RESOURCE DEVELOPMENT	G	521-0156	85	85	---	1,000	1,000	---	---
INTERIM SWINE REPOPULATION	G	521-0170	93	88	3,303	6,000	503	1,197	1,000
HILLSIDE FARMING OUTREACH	G	521-0197	97	76	---	30,000	---	---	2,000
TARGETED WATERSHED MANAGEMENT I	G	521-0191	96	95	---	35,000	---	3,000	4,000
STRENGTHENING COFFEE COOPERATIVES II	G	521-0193	95	95	---	1,000	300	500	---
AGRI-BUSINESS AND RURAL ENT. EXPANSION	G	521-0195	87	90	---	3,000	---	---	1,000
TOTAL FOR ACCOUNT					54,301	140,498	11,979	11,724	17,155
* POPULATION PLANNING									
PROGRAM DEVELOPMENT AND SUPPORT	G	521-0000	73	C	---	---	140	40	40
FAMILY PLANNING OUTREACH	G	521-0124	81	88	9,615	15,615	2,654	2,098	2,000
PRIVATE FAM. PLANNING RESOURCE CENTER	G	521-0169	86	87	---	2,000	---	1,000	1,000
TOTAL FOR ACCOUNT					9,615	17,615	3,904	3,138	3,040
* HEALTH									
PROGRAM DEVELOPMENT AND SUPPORT	G	521-0000	73	C	---	---	50	50	50
RURAL HEALTH DELIVERY SYSTEM	G	521-0091	79	86	17,500	20,000	2,541	1,250	---
MANAGEMENT OF MALARIA	G	521-0143	82	88	8,000	11,500	1,870	2,000	2,000
URBAN HEALTH & COMMUNITY DEVT. II	G	521-0159	84	87	2,100	2,100	689	700	142
TARGETED COMMUNITY HEALTH OUTREACH	G	521-0172	87	92	---	13,000	---	---	2,000
TOTAL FOR ACCOUNT					27,600	46,600	5,170	4,000	4,192
* CHILD SURVIVAL FUND									
Mobilizing Mothers for Child Survival	G	521-0194	95	85	---	3,000	3,000	---	---
TOTAL FOR ACCOUNT					0	3,000	3,000	0	0
* EDUCATION AND HUMAN RESOURCES									
PROGRAM DEVELOPMENT AND SUPPORT	G	521-0000	73	C	---	---	165	150	150
CINEC (COMM. INT. NUT./ED. CENTERS)	G	521-0138	82	85	---	---	385	---	---
MANAGEMENT AND PRODUCTIVITY CENTER	G	521-0183	85	88	---	2,300	450	1,000	550
INCENTIVES TO IMPROVE BASIC EDUCATION	G	521-0190	90	90	---	15,000	---	2,000	3,000
TOTAL FOR ACCOUNT					0	17,300	1,000	3,150	3,500
* SELECTED DEVELOPMENT ACTIVITIES									
PROGRAM DEVELOPMENT AND SUPPORT	G	521-0000	73	C	---	---	337	300	300
SPECIAL DEVELOPMENT ACTIVITIES	G	521-0052	88	C	---	---	200	300	300
CRAFTS EXPORT CENTER	G	521-0177	85	88	---	1,000	200	500	---
INVESTMENT AND EXPORT PROMOTION	G	521-0186	85	89	---	4,000	750	1,000	700
TOTAL FOR ACCOUNT					0	5,000	1,457	2,300	1,500
* ECONOMIC SUPPORT FUNDS									
HAITIAN MORTGAGE BANK	G	521-0163	94	86	1,750	1,750	600	550	---
TECHNICAL CONSULTANTS AND TRAINING	G	521-0157	93	85	1,000	3,100	1,000	1,100	---
NSC SUPPORT III	G	521-0182	85	85	---	3,400	3,400	---	---
CASH TRANSFER	G	521-0185	86	87	---	20,000	---	10,000	10,000
TOTAL FOR ACCOUNT					2,750	28,250	5,000	11,750	10,000
TOTAL FOR DA/ESF					94,266	258,263	30,340	34,064	39,497
TITLE I/II	S/L				---	---	15,000	18,000	21,000
TITLE II	S				---	---	7,395	7,692	3,35
GRAND TOTAL							53,235	61,754	69,34

USAID Haiti Information Package Categories

1. Agriculture and Rural Development

- o hillside/watershed management and soil conservation
- o farming systems research and extension and other agricultural technology development
- o agroforestry (coffee and cacao) research

2. Human Resource Development

- o alternate health care delivery approaches
- o fee-for-care experiments
- o population program reporting/monitoring procedures
- o private sector financing mechanisms for primary education

3. Private Sector

- o strengthening the management and operations of intermediate credit institutions
- o micro-industrial development
- o non-traditional export promotion

5. Research Issues

- o tax policies to support farm-level production and income
- o irrigation sociology (interaction of irrigation systems with community participation/management)
- o establishment of a technical database on tree species

6. Support to Haitian Institutions with information processing roles

- o Center for Agricultural Research and Documentation: agricultural research and adaptation
- o National Statistical Institute: data collection and processing in rural sector
- o Private Enterprise Management Center: technical support services for private sector

ODIS-Haiti Field Visit Issues

- 1 Mission Information Center Configuration
 - 1.1 Organization
 - 1.2 Management
 - 1.3 Collection (information access, processing, and control)
 - 1.4 Information sources
 - 1.5 Budget
 - 1.6 Technology
- 2 Mission Feedback to DI
 - 2.1 Document submission
 - 2.2 Reaction to DI services
 - 2.3 Reaction to ODIS Strategy Paper
- 3 DI Information Support
 - 3.1 Service Information
 - 3.2 Request/ordering Formats
 - 3.3 Communications with Mission
 - 3.4 Priorities (selectivity and product type)
 - 3.5 Abstracts/summaries/syntheses, etc.
 - 3.6 External Databases
 - 3.7 Relation to local Collection
- 4 Mission Programs in Information Management
 - 4.1 Description of Information Services
 - 4.2 Support Requirements
- 5 Requirements analysis
 - 5.1 Country Program Profile
 - 5.2 Information Needs/Resources Assessment
 - 5.3 Information Package Configuration
 - 5.4 Technical Support Requirements

ANNEX 3

**TRIP REPORT FOR TRAINING TDY FOR THE
MISSION LIBRARIAN AT USAID/PORT-AU-PRINCE,
SEPTEMBER 2-11, 1985**

To: Maury Brown and Lee White, PPC/CDIE/DI

From : Karen C. Keyes, Senior Research Analyst, PPC/CDIE/DI

Subject: Trip Report for Training TDY for the Mission Librarian at
USAID/Port-au-Prince, September 2 - 11, 1985

1. INTRODUCTION

In conjunction with Phase I of the ODIS Haiti pilot project, I was requested to provide training to the USAID/Port-au-Prince librarian, Danielle Wahab, (and to a lesser extent, the library assistant, Florence Prevost) in skills areas that the ODIS contractor, Development Alternatives Inc., identified as ones which will enhance the project's implementation. The stated purpose of the ODIS pilot project is to test approaches to improving USAID Mission utilization of AID's institutional memory and other development information resources. Therefore, the focus of the training I provided was primarily on outreach, reference, and general users services, and to a lesser extent, on technical skills such as cataloging. As far as technical services are concerned, the Mission librarian is presently employing systems which work adequately well given the constraints of the present situation. I will expand more on that later in this report.

The Mission library has been operating without either a budget or a policies and procedures manual for the last few years, resulting in library activities that have been somewhat erratic and reactionary. Because the ODIS project emphasizes a proactive approach in meeting the information needs of the Mission, I spent considerable time laying the foundation for a policies and procedures manual as well as putting together two budgets. The first budget is for 1985 end-of-year funds, to be spent immediately on library acquisitions, supplies, and equipment (Appendix A). The second budget is the annual 1986 library budget (Appendix B).

I have made reference to the Mission "library" throughout this report, although the library's name has been officially changed to the "Development Information Center" in keeping with CDIE's emphasis on the enhanced role of the library within the Mission. (See Appendix C, which is a copy of an article I wrote for the combined U.S. Embassy-AID-USIS weekly newsletter)

II. ACTIVITIES PERFORMED

Training

The specific training components of this TDY include the following: users services, reference techniques, outreach and

marketing tools, collection development, networking activities, AID/W services (CDIE), and library automation fundamentals. Training was performed within the library and often while the librarian was "on duty", which meant there were constant interruptions from library users. During this period, the newly hired library assistant came in for a two-hour period most afternoons and she participated in the discussions, as appropriate. Training methods included discussions, i.e., current procedures vs improved ones, readings from textbooks and journal articles, field visits to other Port-au-Prince libraries, and sharing examples of relevant information materials. The timing of this training TDY was especially relevant, because Danielle had just returned from an OAS-sponsored workshop in Guatemala titled, "Organizing and operating technical information centers and services." I was able to expand on several of the themes that were introduced to Danielle at the workshop.

Within the broad area of users services, I stressed reference activities. The development of a core reference collection was highlighted. Using suggestions from several sources (William Katz's reference texts, bibliographies, and my pre-trip investigations), we compiled a preliminary list, which Danielle has begun to order from. (Appendix B includes some of the titles.) We also had a few discussions on reference interview techniques, using Katz readings and an ERIC document titled, "The Process of Answering Reference Questions," and examples drawn from my ten years of experience in reference and research services.

In addition to the Mission librarian's reference role, we spent time going over her role as the information intermediary between CDIE and the Mission. We discussed all of the responses to Mission information requests that DI research and reference staff had completed, stressing the various approaches that were taken in each case. My intention was to convey a clearer idea of what's involved in answering a variety of information requests.

The subject of interlibrary loan was also discussed, and we spent some time investigating ILL networks in the Caribbean region. Prior to my departure, I spent time with Lee Clift, discussing the Caribbean library network. Lee, now with DI, spent five years as a Peace Corps librarian in Grenada, and has a considerable knowledge of the Caribbean library scene. The University of the West Indies network may prove to be especially useful. Lee was kind enough to write down all of her networking thoughts, which I shared with Danielle.

Networking within the Port-au-Prince information community was also stressed. Local networking allows for the sharing of resources, ideas and methods, eliminating the unnecessary duplication of efforts. While Danielle has maintained ties with the

UNDP librarian, Huguette Pualtre, she feels that greater contact and information exchange would be worthwhile. We spent a morning with Ms. Pualtre, brainstorming for exchange possibilities, and studying the similarities and differences between AID's and UNDP's development collections and information services. In addition to the UNDP visit, we met with the Cultural Officer at USIS, Rachel Edensward, who shared her ideas about information exchange between local information professionals; Gwili Posey, the librarian at The Haitian-American Institute, gave me a tour of the library's extensive holdings and shared a copy of her library manual; and Denise Westcott, the Peace Corps librarian, was also consulted. We also made a trip to the U.S. Embassy's economic library, which maintains a surprisingly small, somewhat out-of-date collection.

Training sessions also highlighted outreach activities. Specific outreach products which the library will initiate include a regular newsletter, occasional information bulletins on timely topics, and a one-page Development Information Center handout to present the services, hours, and general arrangement of the DIC to users. Currently, Danielle is devoting some time to a clipping service in which all development-related articles from the Port-au-Prince daily newspaper are clipped and routed within the Mission. I spent some time discussing the concept of SDI (selective dissemination of information) and current awareness services, citing examples currently used at the Cairo Mission. Also, we noted the Haitian-American Institute's journal article clipping service which gets a lot of positive feedback from users.

Collection development and acquisitions policies and procedures is another training category that I stressed. In the course of putting together the two budgets, we discussed specific immediate and long-term collection needs. Danielle keeps a file of book and document titles that are priority purchases; with an annual budget now, she has begun to place these orders. In addition, we discussed the overall goals of collection development within the Mission. As the ODIS pilot emphasizes, Mission program and project objectives should form the basis for any Mission library collection. Using the Haiti program categories that The DAI contractors compiled, Danielle has begun to think about ways in which she will utilize them in acquiring both AID and external documents. This is an area that will require much more time and thought in the upcoming months; I will continue to work with Danielle on this issue.

Collection weeding is a topic that goes hand-in-glove with library acquisitions, especially when there are space limitations to consider. The Haiti Mission library, no stranger to space problems, has had to face this issue head on. Danielle and I weighed the factors involved in document storage vs weeding. While an interim solution may be found by using storage space in a room adjacent to

the library, a long-range solution is sought. As noted in DAI's Phase I trip report, the library currently houses a considerable number of irrelevant out-of-date documents; some of this number may be historically useful within the Mission, a factor which must be weighed in the final weeding policy. Given the limited amount of time I had in the Mission, I could give nothing more than a cursory look at the collection instead of the thorough examination needed to begin a full-scale weeding project. Danielle and her assistant will begin such a project based on our discussions.

Serials (i.e., periodicals, journals, annuals) collecting is in a somewhat nebulous state at the present, and we made some progress toward solving the related problems. Several years ago when the library had a budget of its own, there were quite a number of serials subscriptions for both general development titles as well as technical and sector-specific ones. At present, the library houses the back copies of these titles, most of which are inactive. In addition, the various program offices have their own subscriptions to many of the same titles, but no one within the Mission keeps a master list of all such titles. Two steps have been proposed: one is for Danielle to track all serials subscriptions within the Mission program offices, and the second is to order core subscriptions for the library from a list which we drew up using the AID Library serials printout. Many of the serials on this core list are newsletters which are available at no charge to Missions (many are published by AID-funded PVOs); the library assistant has begun to send a form letter requesting receipt of such serials.

Miscellaneous activities included a discussion of standard library forms and their uses; I have sent copies of AID Library forms which Danielle will adapt for Mission usage. We also discussed the pros and cons of collection inventorying in conjunction with a weeding project. Inventorying any collection is an extremely time consuming endeavor which involves checking the master card file against actual holdings; if an inventory has never been performed before, such factors as shelf disorder can create a nightmare situation.

As mentioned in the introduction, a Development Information Center Manual to assist Danielle in the Center's operations is underway. Given the brevity of my stay in Haiti, we were unable to complete the actual writing of the manual. Using the notes and input I gathered at the Mission, I will complete the project this fall.

We compiled an Action Plan for the Mission DIC, which outlines specific objectives and gives proposed completion dates for each objective. The overall goal of the Action Plan is to make the DIC as proactive and responsive a Mission resource as possible, in keeping with the ODIS pilot project objectives. (See Appendix D)

Briefings and Interviews

In addition to the training portion of my TDY, I conducted a group briefing and several individual interviews.

I briefed all of the Program Officers (or their designated representatives) on CDIE services and the ODIS pilot project and its implications for the library and the Mission. In general, the group was quite enthusiastic about the possible implications of ODIS. Since many of the participants were also recent DI users (submitted information requests at the time of the first ODIS field visit), we had a meaningful discussion of what CDIE is capable of doing, especially the DI Research unit. It was gratifying to have some of the participants extol lavish praise on the responses they received to their requests. Some asked questions on very specific things such as AID document microfiche collections, the pros and cons of adding a microcomputer to the library, the types of outreach efforts that Danielle will be involved in, the Development Information System (DIS) databases, centralization vs decentralization of library collections, especially serials, and the library storage issue.

I also conducted several individual interviews with Mission personnel. I met with Kent Hickman, the Executive Officer of the Mission, who is responsible for overseeing library activities. I got his reaction (basically favorable) to the two library budgets, and discussed Danielle Wahab's enhanced role within the Mission, i.e., keeping her abreast of program and project activities so that she can upgrade the collection and better serve the users. Hickman admitted that because his office is not program oriented, it may not be the appropriate place for the library; he recommended that eventually it return to the Program office which had jurisdiction over the library until fairly recently.

I met briefly with Barry Burnett, Program Officer, who sought me out after reading the memo announcing my presence in the Mission. He expressed an interest in the training that Danielle was receiving, as well as the overall program implications of our efforts. He also discussed the recent past when the library came under his jurisdiction, but withheld opinion on whether or not the library should go back to the Program office.

I interviewed a few of the people who recently requested DI's services. Lisa Matts had not had sufficient time to read the entire information package that arrived, but she was quite favorably impressed with the timeliness and thoroughness of the response, which included a synthesis of AID and other donor experience with

coffee production projects; she also felt that all of the documents sent to her were "on target." Barry Heyman was extremely complimentary in his remarks on the two packages he received: a synthesis of development experience of preschool interventions in the Third World, and information on PVOs as sources of long-term financing for education in LDCs. He especially appreciated the researcher's efforts to both go beyond AID's experience and to actually make solid points, e.g., attending a preschool program affects subsequent performance in the following ways... Richard Byess reported mixed results with his two requests: he felt the complete bibliography of all Haitian and Dominican Republic dissertations was excellent, while his request for a complete project-by-project profile of obligations vs disbursements of all Haitian projects ever was incomplete. The Research unit is currently following up on this request, but it may be an impossible assignment. Jim Berezin requested additional information on shadow pricing and evaluations of all development finance corporation projects.

Follow-up

As mentioned above, the DIC Action Plan outlines the steps to be taken now and in the immediate future to complete ODIS pilot project objectives and bring the USAID/Haiti Development Information Center up to an optimal operating level. My involvement will be to facilitate the completion of the DIC Policies and Procedures Manual and to monitor Danielle Wahab's continued progress in the training areas.

LIBRARY EQUIPMENT & SUPPLIES

<u>QTY.</u>	<u>EQUIPMENT</u>	<u>COST</u>
100	Large metal book supports	\$151.00
3	Rolls, 16" polyester book covers	122.25
1	Magazine Rack	317.00
3	Rolls, reinforcement tape, 2" wide	13.50
1	Microfiche reader and necessary equipment (cleaning kit, \$21.00; 2 lamps, \$30.00; dust cover, \$8.00)	318.00
3	Microfiche storage boxes	43.50
	Sub-total	<u>\$965.25</u>

DIC REFERENCE COLLECTION

New Columbia Encyclopedia, latest edition	\$80.00
McGraw-Hill Science & Technology Dictionary	150.00
New International Atlas (McGraw- Hill)	60.00
World Almanac	8.00
Statesman's Yearbook	17.00
Statistical Abstract of the U.S.	12.00
U.N. Statistical Yearbook	41.00
Agricultural Statistics	5.00
Manual of Style, Turabian	15.00
Publications of International Research and Development	10.20
	<hr/>
Sub-total	\$398.20
TOTAL	<u>\$1363.35</u>

DEVELOPMENT INFORMATION CENTER
ANNUAL BUDGET

Acquisitions:

Books

Outstanding requests	\$200.00
Haiti bibliography series	\$200.00
Ongoing requests	\$400.00

Periodical subscriptions

PAHO journal	\$12.00
Caribbean Contact	10.00
Caribbean Review	12.00
Agroforestry Systems	56.00
Community Development	38.00
International Family	
Planning Perspectives	15.00
Third World Quarterly	30.00
Titles to be decided	127.00

TOTAL:	\$1100.00
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Library Supplies:	100.00
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Outreach Materials (e.g., brochures)	150.00
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Communications with AID/Washington (10 calls, \$30.00 each)	300.00
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Microfiche Reader/Printer	2700.00
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Printer supplies & equipment (3 lamps/21.00; 4 rolls paper/ 200.00;dust cover/11.00; cleaning kit.21.00)	300.00
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Salaries:

DIC Manager	
DIC Assistant	To be finalized

AID'S Development Information Center

NEW NAME-----NEW FOCUS

The AID Mission Library has a new focus and a new title: the Development Information Center (DIC). Danielle Wahab, the Center's Information Manager, is now full-time and runs the Center from 8:30 - 4:30. She is currently making some changes that will better assist the Mission's program and project activities, thereby carrying out AID's overall goal to increase the effective use of appropriate information to enhance capacities for project design, management, and evaluation, as well as support host country information access and use. Mrs. Wahab will emphasize outreach activities such as a regular newsletter, information bulletins, and increased involvement with Mission staff.

The Development Information Center will be the Mission's direct link to the AID/Washington Center for Development Information and Evaluation (CDIE). CDIE's primary aim is to provide Missions with access to a worldwide network of development information resources. Such resources include:

- * the computerized Development Information System (DIS) database which consists of 40,000 documents for over 6,000 projects
- * AID's automated Economic and Social Data Bank (ESDB)
- * the main AID Library and a wealth of resources
- * over 400 non-AID databases, including those of the U.S. Department of Agriculture, U.S. Department of Energy, Canada's International Development Research Centre, U.S. Bureau of the Census, the United Nations, and the World Bank, just to name a few

Mrs. Wahab is currently working to model the Mission's Information Center after AID/W's Center, adding the most useful, up-to-date information resources, journal subscriptions, documents, and research reports. She will act as the liaison to CDIE's staff of researchers and technical information specialists in Washington. Mission staff may submit the following types of information requests to Mrs. Wahab for immediate attention:

- * requests for summary reports or syntheses of technical and program materials; e.g., "What is AID's and other donors' experience with watershed management projects, and what lessons have been learned?"
- * copies of relevant documents and reports
- * related information services such as compilation of bibliographies and printouts of information on current topics, e.g., the latest information on malaria control research
- * economic and social data

STOP BY THE DEVELOPMENT INFORMATION CENTER OR CALL EXT. 3079
between 8:30 a.m. - 4:30 p.m., Monday through Friday.

ACTION PLAN for the USAID/Port-au-Prince Development
Information Center

(* - require immediate
attention)

1. DIC Annual Budget:
 - * - meet with Kent Hickman, EXO, to finalize the salaries portion of the budget; add to the budget for grand total. (DW, Sept. '85)
2. Clarify job description for DIC assistant (Florence Prevoist) (DW, Sept. '85)
3. Investigate PC purchase for the DIC (KK, Sept. '85)
4. Forward various components of current library operating procedures to AID/Washington:
 - circulation policy
 - collection weeding vs. storage
 - book ordering(DW, Sept. '85)
5. Investigate the microfiche reader/printer situation in Port-au-Prince:
 - * - Peace Corps library & USIS -- do they have service contracts; makes & models?
 - service agreement options; maintenance problems; supplies(DW, Sept. '85)
6. Serials subscriptions:
 - track the subscriptions throughout the Mission (DW, Oct.15 '85)
 - based on the above findings, place appropriate subscription orders in the DIC's name (DW, Oct.30'85)
 - maintain a record of non-DIC subscriptions, noting recipient's name and office (ongoing)
 - using AID Library Serials list, send form letter to relevant institutions to receive regular publications, newsletters; get on mailing lists (FP, Oct.'85)
7. Place book orders and new periodical subscriptions, using the lists submitted to K. Hickman (DW & FP, Sept/Oct.'85)
8. Devise a serials check-in system, using UNDP library forms (DW, Sept/Oct'85)
9. Train DIC assistant to catalog materials (DW, Oct.'85)
10. Cataloging workload -- complete the current backlog (DW & FP, Feb '86)

11. Complete the readings relevant to DIC training with Keyes:
 - Katz, V.I, pp 3-36, "The Reference Process;" pp. 58-60, "Weeding the collection;"
 - Katz, V.II, pp 41-63, "The Reference Interview and Levels of Service;" pp.76-80, "Translation of the Question;" pp.97-121, "The Computer and Reference Service."
 - ERIC Document 136769, "The Process of Answering Reference Questions" by Gerald Jahoda.
 - Also note the UNESCO pamphlet, Small Technical Libraries by D.J. Campbell, general information on library organization and policy formation.
(DW & FP, Sept/Oct'85)
12. Create form letters for the DIC:
 - send all relevant AID/W Library forms to Mission
(KK, Sept'85)
 - adapt AID/W forms for Mission DIC use (DW, Oct.'85)
13. Produce outreach products and initiate new services (see the attached list, "Outreach Products") (DW, Fall, '85)
14. Order library supplies (list approved by EXO, 9/10/85)
(DW, Sept. '85)
15. Complete the USAID/Haiti DIC Manual (KK, Oct. '85)
- * 16. Proceed with networking activities/maintain contacts with relevant Port-au-Prince information specialists
(DW & FP, ongoing)

ANNEX 4

**ACTION PLAN FOR THE USAID/PORT-AU-PRINCE
DEVELOPMENT INFORMATION CENTER**

ACTION PLAN for the USAID/Port-au-Prince Development
Information Center

(* - require immediate
attention)

1. DIC Annual Budget:
 - * - meet with Kent Hickman, EXO, to finalize the salaries portion of the budget; add to the budget for grand total. (DW, Sept. '85)
2. Clarify job description for DIC assistant (Florence Prevoist) (DW, Sept. '85)
3. Investigate PC purchase for the DIC (KK, Sept. '85)
4. Forward various components of current library operating procedures to AID/Washington:
 - circulation policy
 - collection weeding vs. storage
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 - * - Peace Corps library & USIS -- do they have service contracts; makes & models?
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6. Serials subscriptions:
 - track the subscriptions throughout the Mission (DW, Oct. 15 '85)
 - based on the above findings, place appropriate subscription orders in the DIC's name (DW, Oct. 30 '85)
 - maintain a record of non-DIC subscriptions, noting recipient's name and office (ongoing)
 - using AID Library Serials list, send form letter to relevant institutions to receive regular publications, newsletters; get on mailing lists (FP, Oct. '85)
7. Place book orders and new periodical subscriptions, using the lists submitted to K. Hickman (DW & FP, Sept/Oct. '85)
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11. Complete the readings relevant to DIC training with Keyes:
 - Katz, V.I, pp 3-36, "The Reference Process;" pp. 58-60, "Weeding the collection;"
 - Katz, V.II, pp 41-63, "The Reference Interview and Levels of Service;" pp.76-80, "Translation of the Question;" pp.97-121, "The Computer and Reference Service."
 - ERIC Document 136769, "The Process of Answering Reference Questions" by Gerald Jahoda.
 - Also note the UNESCO pamphlet, Small Technical Libraries by D.J. Campbell, general information on Library organization and policy formation.
(DW & FP, Sept/Oct'85)
12. Create form letters for the DIC:
 - send all relevant AID/W Library forms to Mission (KK, Sept'85)
 - adapt AID/W forms for Mission DIC use (DW, Oct.'85)
13. Produce outreach products and initiate new services (see the attached list, "Outreach Products") (DW, Fall, '85)
14. Order library supplies (list approved by EXO, 9/10/85)
(DW, Sept. '85)
15. Complete the USAID/Haiti DIC Manual (KK, Oct. '85)
*
16. Proceed with networking activities/maintain contacts with relevant Port-au-Prince information specialists
(DW & FP, ongoing)

SUPPLEMENT to ACTION PLAN
 USAID/Port-au-Prince Development Information Center

1. Communications, Outreach, and User Awareness (DIC service link to Mission information needs)
 - o Review microfiche index and MicroDIS data base for references addressing current mission project design initiatives to provide bibliographies of relevant and available documents to project officers.
 - agroforestry
 - watershed management
 - swine repopulation
 - o Report to Barry Burnett on results of conversations with project officers regarding new and upcoming projects and amendments.
 - o Read mission Action Plan to identify areas of future program emphasis to build relevant information resources.
 - o Attend concept paper, PID and project review meetings to be aware of new project initiatives.

2. Administrative Issues
 - o Complete draft of FY '86 DIC budget
 - o Resolve position classification issue with EXO
 - o Delegate selected DIC responsibilities to assistant to permit greater outreach orientation for DIC director.
 - o Complete items specified in original DIC Action Plan
 - Draft and forward current DIC procedures to DI (#4)
 - Track serials subscription needs and process them (#5)
 - Train assistant to take responsibility for cataloging, deselection and other DIC functions (#9)
 - Complete current cataloging backlog (#10)
 - Produce outreach products and initiate new services (#13)

4 October, 1985

OUTREACH PRODUCTS

- Newsletter (regular)
- Information bulletins (Occasional and timely)
- One-page DIC handout for users
 1. giving a broad outline of classification
 2. Floor plan layout (e.g., real-reference
 - annual reports
 - serials
 - main collection with classification scheme
 3. Services
 4. Tie-in with COIE, AID A
- SDI service
- Daily newspaper clipping service

ANNEX 5

LIST OF MISSION INFORMATION REQUESTS

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LIST OF MISSION INFORMATION REQUESTS

1. Lessons learned or summaries of evaluations for Special Development Activity (SDA) projects to assist in the evaluation of an ongoing USAID/Haiti SDA project.
2. Development experience of pre-school interventions and programs in the Third World, specifically, the relationship between attending a pre-school program and subsequent performance in primary school.
3. Examples of export marketing surveys to be used in supporting a mission project on exporting local crafts.
4. Information on (1) PVOs as sources of long-term financing for education in developing countries, (2) methods of reducing private cost (to parents) of basic education, and (3) ways of fostering government/private sector collaboration on financing education.
5. Mission is planning on performing a multi-project sectoral evaluation in health, with similar plans for private sector, agriculture, and human resources. Who has attempted a sector evaluation approach, and what methodological guidelines were followed to perform the evaluation?
6. Information on the structure, market, and operating evolution of AID, IFC, and World Bank development finance banks to be used to support redesign of Development Finance Corporation Project.
7. Compilation of AID/Washington technical assistance services available to the field through AID-funded contracts, grants, and cooperative agreements in population and family planning.
8. Information concerning applications of solar energy in developing countries to brief mission director and ambassador on possible uses of solar energy in development.
9. Information on basic and inexpensive construction of simple lime kilns, preferably a manual with illustrations.
10. Life-cycle costs of photovoltaic systems in comparison with other remote energy systems such as diesel or gasoline.
11. Technical summaries of latest information on the treatment, diagnosis, and epidemiology of tuberculosis as well as national programs to control or eradicate it.

ANNEX 5 -- Continued

12. National planning on economic development in developing countries, particularly the role of a civil service cadre in designing and executing policies conducive to economic growth.
13. Information on the cultivation, diseases, growth requirements, by-products, and medicinal properties of Aloes.
14. Lessons learned from AID support to coffee production in countries with characteristics similar to Haiti to help local understanding of ways to increase smallholder production using intercropping and low levels of inputs.
15. An order for a series of 66 publications (266 total copies) from the "Techniques Americaines" series.
16. Historical information on obligations versus disbursements (by project) for all AID funds to Haiti, 1948-present.
17. List of dissertations and theses on Haiti or Santo Domingo for 1945-1985.
18. Information search on primary health care, especially nutrition programs and training.
19. State-of-the-art information on the cultivation of castor beans in the tropics and on the use of castor bean oil as a high-quality lubricant.
20. Tropical cultivation of and uses for jojoba.
21. A manual on developing small libraries in rural areas.
22. Feasibility studies or other information regarding machinery necessary to make ice blocks and the marketing of ice by small enterprises.

ANNEX 6

DI INFORMATION SUPPORT ASSESSMENT

DI INFORMATION SUPPORT ASSESSMENT

Requestor _____

Request Type _____

Doc: _____

Res: _____

Nature of Request _____

Time Required for Response _____

Satisfactory? _____

Comment _____

User Assessment

Did the information meet needs?

Yes: _____ No: _____ More needed? _____
(if No, please comment below)

How would it have better served needs? _____

Other information sources used _____

How Used _____

Impact (indicate whether actual or expected) _____

What future uses of DI support are likely _____

Other DI services desired _____

Other Comment _____

ANNEX 7

JOB DESCRIPTIONS FOR PROJECT STAFF

ANNEX 7

JOB DESCRIPTIONS FOR PROJECT STAFF

PROJECT DIRECTOR

The project director will be responsible for overall project implementation. His or her principal duties will include:

- Advising and assisting PPC/CDIE/DI in organizing and maintaining its support structures for the ODIS project;
- Supervising, directing, and evaluating project staff, including assigning responsibilities for geographic coverage for Latin America and the Caribbean, Africa, and Asia and the Near East;
- Establishing and maintaining linkages with AID regional bureaus and other divisions regarding effective use of AID's institutional memory and other development information by field personnel;
- Supervising the provision of project services and assistance overseas, including technical assistance to the development or strengthening of local information management capabilities and the transfer of relevant and timely responses to information requests received from the field;
- Advising and advocating regarding information needs of the field;
- Developing project evaluation instruments and managing evaluation activities pertaining to project activities;
- Arranging and maintaining links with other relevant data bases;
- Advising on the appropriateness of proposed technologies for use in field settings; and
- Managing the project budget and ensuring application of appropriate fiscal management control mechanisms.

To help ensure that the project director will have the skills and experience necessary to fulfill these responsibilities professionally, it is suggested that the following minimum requirements be established:

- Have training and experience in the field of information management;
- Give evidence of interest in, and abilities to, undertake informational entrepreneurship -- that is, to help generate interest in, and demand for, ODIS project resources and services;
- Have field experience and/or training relating broadly to issues of Third World development; and
- Have demonstrated project and personnel management skills.

REGIONAL COORDINATORS

The two regional coordinators will assist the project director in the conduct of his or her duties. In addition, they will have specific responsibility for:

- Identifying potential project field sites for project activities;
- Ensuring provision of appropriate administrative and substantive support to projects in the field, including technical assistance and backstopping to field programs with participating institutions in developing countries;
- Evaluating field effectiveness of project operations and making recommendations for improvements;
- Generating demand for DI/ODIS project services in both project and non-project sites, as a key element in measured expansion of the project; and
- Acting as liaison, through the project director, with appropriate agencies and individuals within and outside of AID concerned with improved field use of information.

Qualifications for regional coordinators should include, but not necessarily be limited to, the following:

- Have the skills and training to organize the management of reference collection services in field settings, including the training of personnel to operate these services;
- Be demonstrably oriented toward information management and outreach services rather than toward archival services and collection maintenance, and in particular focused on the management and retrieval of automated reference information; and
- Be experienced in dealing with information management issues in the development context, and be knowledgeable about and interested in development as a substantive field.

TECHNICAL ASSISTANCE/TRAINING STAFF

These two individuals will focus their efforts on support activities in the field, consistent with project objectives and under the direction of the project director and regional coordinators. This support will primarily involve the development in USAID missions of staff and other capabilities required for effective mission-level information management. Thus, these staff will be both consultants and trainers as the situation requires. Among the services they will be prepared to provide will be assistance to missions in overall information management, including the application of automation and other technologies to this concern.

Special responsibilities will include:

- Supporting the project director and regional coordinators in matters relating to information technologies, especially microcomputer applications and telecommunications;

- Analyzing the availability of free or commercial data bases of relevance to USAID mission information needs and exploring arrangements to make them available for direct access in the field; and
- Developing instructional materials on information management to assist personnel in field information centers in knowing how most easily and effectively to access all available data bases, or to organize their own collections for easy retrieval and, if appropriate, automation.

Key qualifications for this position include:

- A strong understanding of information management techniques, including automated tools for information storage, retrieval, and transmission;
- Experience in providing consulting services in the field, preferable in an AID context and to USAID missions; and
- Ability to interact with senior USAID mission personnel to promote effective information management and mission commitment to the necessary management steps and resource commitments.

ADMINISTRATIVE ASSISTANT

This person will be responsible for all normal administrative matters, including maintenance of project files, correspondence, accounting, and logistical arrangements. He or she will report directly to the project director, who will assign specific duties.