

COMPOSITE GROUP INVENTORY EVALUATION PLAN

I. METHODOLOGY

The composite group bases the methodology for completing the evaluation activities and recommendations/proposals on the completion of a five-step assessment and evaluation system. The system begins with the gathering of information followed by an assessment of that information gathered. The processes involved in the data entry of and reporting on the fellowship surveys and committee/board and conference self-assessments contain these two steps. These steps are followed by the third step, an evaluation of those assessments that identifies and defines the problem areas. Once the problem areas are defined, the inventory participants can apply the fourth step--interventions or resolutions to those problems. Concluding the process is the fifth step, an overall review that evaluates the effectiveness of the interventions or resolutions.

Upon completion of the information gathering and assessment phases, the project moves to the evaluation phase. The evaluation plan seeks to use those who compiled the assessments to evaluate those assessments. The most qualified to evaluate those assessments, based on our understanding of "inventory," are those who sought to be "fearless and thorough" in their efforts. The composite group, while representative of the overall system, does not possess the necessary expertise in all the targeted inventory areas. By using the inventory participants to provide the evaluation activities in their targeted areas, it will allow the composite group to provide an overall evaluation of world services from a perspective that is representative of the conference. Using the individual evaluations to compile the overall evaluation effectively removes the focused mindset of a single world service body and allows for an all-encompassing overview of world services. In addition to spreading out the evaluation task among all world services, this process increases the accuracy of the evaluation process as well as the probability of project completion according to schedule.

To facilitate this process, the composite group will develop a standard format to complete the evaluation activities. This format will provide an opportunity for the inventory participants to recommend solutions to the problems they've identified. The process will allow the composite group to receive focused input and increase its ability to reduce recommendations/proposals for consideration by the conference. The composite group will also have the option to not provide recommendations or proposals and instead present the problem area(s) for discussion and subsequent resolution. This will remove the constraints of having to propose options should the composite group believe the solution(s) are beyond their ability or scope to provide.

Overall, the methodology described above seeks to enhance the inclusion of all inventory participants and use all available world service resources to provide a comprehensive evaluation. The following is a detailed plan for the evaluation phase.

II. GOALS AND OBJECTIVES

A. Goal

Provide the World Service Conference with a comprehensive evaluation of all world service components during the 1994 conference year. Also provide an overall evaluation of the world service system that includes the performance of the world service system, integration of the various components, and the system's viability to provide services as designated.

B. Objectives

1. To identify problems within the various segments of world services through the utilization of self-assessment tools by each service entity and subsequent self-evaluations by those same entities.
2. To obtain additional input regarding service delivery through the compilation and evaluation of the returned group, area, and regional surveys.
3. To identify problems within the WSC by assessing and evaluating the conference activities through the use of inventory tools in small group meetings and general assemblies of WSC'94.
4. To compile the results from all assessment and evaluation activities and provide an overall evaluation of the world service system by the designated composite group.
5. To provide an independent systems evaluation using the inventory participants' assessments and evaluations, fellowship surveys, and world services organizational documents as source material, and present a report of all findings to WSC'95.
6. To provide the World Service Conference with recommendations and/or proposals from the composite group that will act as a foundation for problem-solving activities at WSC'95.

III. ADMINISTRATIVE ACTIVITIES

A. Protocol

The World Service Inventory Composite Group will have administrative authority for all inventory activities. The composite group, in fulfilling their responsibilities as described in the inventory plan, will:

1. Provide a liaison to all components of the world service system. Each liaison will act as a communication link to their assigned service body and provide assistance to that entity throughout the evaluation activities.
2. The composite group will utilize work teams to expedite its activities, however, the full composite group will approve all tasks and projects assigned to the work teams.

3. As stated in the inventory plan, "administrative oversight is provided by the Interim Committee," therefore, the composite group leader will provide the Interim Committee with ongoing verbal and written reports at the Interim Committee's regularly scheduled meetings or calls.

B. Reporting

1. Ongoing Reporting

The composite group will continue to report all activities through a monthly inventory update and distribution of their meeting records or activity reports. The composite group will distribute, at WSC'94, the committee and board assessment summaries. Once compiled, all results of inventory activities are available upon request.

2. Evaluation Content

The composite group will provide evaluations of all boards and committees, the WSC, the WSO, the results of the fellowship surveys, and the world services system as a whole. Each evaluation will contain:

- A statement of identified problem areas
- A description of the problem
- A rationale of why and how it is a problem

3. Consultant's Report

The consultant's report shall include but not be limited to:

- A statement of identified problems
- A description of problems
- A rationale for their determination of the problem
- A statement of corrective action

4. Final Analysis

The composite group will write the final analysis and distribute it to the fellowship via the 1995 CAR. The final analysis shall include:

- A statement of identified problems of all boards and committees
- A statement of identified problems of the WSC
- A statement of identified problems of the WSO
- The results of the fellowship wide surveys
- A rationale for all identified problems
- An overview and correlation of identified problems to the overall world services system
- Recommendations an/or proposals to be considered for problem-resolution

5. Evaluation Recommendations/Proposals

The composite group may, at its option, provide recommendations and/or proposals to the conference, for it to consider as a foundation to begin problem-solving activities at WSC'95. (Regardless of option chosen, the Composite Group will include a report about its activities in the 1995 *Conference Agenda Report*.) Each recommendation or proposal will include:

- If the composite group provides recommendations/proposals for an identified problem, they will provide at least two options for resolving that problem.
- Should there not be a recommendation/proposal for an identified problem, the composite group will either recommend a course of action for the WSC to take in the resolution of the problem area or present the problem for discussion.
- Any options or proposals recommended shall include a rationale for that option and all available information necessary to implement it.

IV. DESCRIPTION OF EVALUATION ORGANIZATION

A. Overall Evaluation Process

The overall evaluation process has four main components: the fellowship-wide surveys, the board and committee evaluations, the WSO evaluations, and the WSC evaluations. The independent systems consultant is an additional component, treated separately allowing for their own processes to be used to produce their report. Tools were or will be provided to each world service entity to complete their self-assessment. Once the individual self-assessments have been completed, the individual service bodies will evaluate the results of their own self assessment. To facilitate this process, instructions aimed at developing consistency in content will be provided. Once completed, the results will be forwarded to the composite group for their use in preparing the overall evaluation. The boards and committees will conclude their evaluation efforts either at a world services meeting to be held in mid to late July. For the WSO and WSC, the evaluation components will be included in their inventory activities. All assessments and evaluations will be concluded by the end of September in order to allow the composite group to complete the overall evaluation during October and November and to finalize its recommendations in January for the 1995 CAR. (See IIIB for process details.)

B. Evaluation of World Service Components

1. Committee and Boards

The composite group will return committee and board assessments to the respective committees and boards at WSC'94. Each committee and board will be responsible to develop their own plan to accomplish the evaluation without staff support. The WSO will provide staff support in the final stage, concluding the committee or board evaluation, in the same manner as was provided for the New Orleans world services meeting. At the '94 conference, the composite group will conduct a short meeting for the leadership of the boards and committees to allow for clear and concise directions, to provide answers to any questions, and to share suggestions or ideas about how to accomplish the evaluation.

2. Fellowship Surveys

Prior to WSC'94, a small working group will complete an initial analysis format for the fellowship surveys. Once the composite group has approved the format, the results of this initial analysis of the surveys received will be presented at WSC'94. The composite group will extend the survey return date to accommodate late arriving surveys. The composite group will review the evaluation format and run a final analysis in July or August. Details of the evaluation format will be available through the composite group's regular reporting in the inventory update and group notes.

3. World Service Conference

During WSC'94, the conference will engage in self-assessment activities using an inventory tool provided by the composite group. In addition, the conference will identify problem areas and thereby complete the conference's inventory activities. Extracting the problem areas will require meetings of the small group representatives and discussions with the conference in general session.

4. World Service Office

During a three month period, the WSO will engage in inventory activities using a set of assessment and evaluation tools. Prior to the composite group's April 1994 meeting, a small work team will create the tools to be approved by the composite group at that meeting. The tools will be developed in consultation with the WSO management staff in an effort to insure the maximum efficiency of the instruments and to allow the office to complete its inventory without compromising its ability to provide basic services. The tools will be configured to address the key aspects of services and functions provided by the WSO. Due to the nature and function of

the WSO, their assessment and evaluation activities will span a three-month period.

a. Auditing activities

The WSO engages in ongoing financial activities requiring an outside auditor to measure the WSO's performance against its financial policies. The WSO's 1992-1993 auditor's performance report will be used as an assessment and evaluation of those activities. However, the accounting and management teams will also engage in the assessment and evaluation activities using the assessment tools..

C. Development of Recommendation/proposals

As defined in III-5 "Reporting-Evaluation Recommendations/Proposals," the composite group will present recommendations/proposals to the WSC in 1995. Each component of world services involved in the inventory will assess and evaluate themselves using the inventory tools provided by the composite group. Such self-generated evaluations will contain recommendations and/or proposals for the possible resolution of identified problem areas. The WSC inventory and the fellowship surveys will be evaluated by the composite group. The composite group will incorporate all evaluations into a single assessment and evaluation report which will also include an overall assessment and evaluation of world services. The overall assessment and evaluation will be developed by using all of the source material generated during the inventory process.

V. STAFFING IMPACT

A. Inventory Project Staff

1. Additional evaluation activities
 - Administration of working team conference calls
 - Recording of additional working team conference calls
 - Additional compiling of evaluations and editorial assistance

B. Overall Staffing Pattern

1. Additional evaluation activities
 - Staffing to finalize evaluation report (editing and/or organization) for boards and committees (Staff member only to be involved in final report meeting).

VI. BUDGETARY IMPACT

A. 1994 budget line items

Description of 1994 Inventory budget line items (to be added later)

B. Additional Activities

- Addition of one day to a world services meeting - to finalize evaluation activities
- Additional administrative expenses per committee and board (Faxing, phone, and or postage) - to help facilitate evaluation activities during evaluation process
- Additional composite group small working team conference calls - 2 each - to discuss and format committee and boards evaluation for final report may include committee and /or board leadership if necessary.

C. Overall budget comparison

Describe how additional line items are to be included in overall budget. Revised budget compared to presented budget line item. (To be added later.)

VII. EVALUATION PLAN TIME LINE CHART

(The composite group will use small working teams to complete their task. See main inventory plan for operation of small working groups.)

WSC'94

- WSC completes its own self-assessment and evaluation activities
- Committee/board self-assessment summaries are handed out
- Initial analysis of survey received by 2/01/94 handed out

May 94

- Committees and boards begin evaluation process
- Composite group begins evaluating WSC
- Continue receiving fellowship surveys

June 94

- Committees and boards continue evaluation process
- Composite group continues WSC evaluation process
- Systems consultant begins work
- Deadline for receiving fellowship surveys - 6/01/94
- Data entry of received questionnaires

July 94

- WSO begins assessment and evaluation process
- World service meeting to finalize committee and board evaluations
- Continue WSC evaluation
- Systems consultant continues work
- Begin analysis of fellowship surveys

August 94

- WSO continues assessment and evaluation process
- Composite group to begin compiling overall evaluation and final analysis
- Systems consultant continues work
- Continue WSC evaluation

September 94

- WSO completes assessment and evaluation
- Systems consultant continues work
- Composite group to continue compiling overall evaluation and final analysis
- Continue WSC evaluation

October 94

- Composite group to continue compiling overall evaluation and final analysis
- Systems consultant finalizes work
- Complete WSC evaluation

November 94

- Composite group to continue compiling overall evaluation and final analysis

December 94

- Composite group to finish compiling overall evaluation and final analysis

January 95

- Publish final report in CAR with consultants report.