



## **WCRP Program**

### **1. Accounts**

#### 1.1. Program subrecipient (PRDOH provides subrecipient & main POCs)

1.1.1. Name

1.1.2. Type

1.1.2.1. NGO

1.1.2.2. Municipality

1.1.3. Address

1.1.4. Individuals who are staff of the participating organization

1.1.4.1. Name

1.1.4.2. Position

1.1.4.3. Email

1.1.4.4. Phone number

1.1.5. Community(ies) (each program subrecipient will have various communities that they will be working with)

1.1.5.1. Name

1.1.5.2. Barrio

1.1.5.3. Municipality

1.1.5.4. Community Working Group

1.1.5.4.1. Name and contact of each individual who belongs to the community's working group

1.1.5.5. Other individuals (name & contact info) that are members, stakeholders or allies or of the community

### **2. Program Services**

#### 2.1. Case Management

2.1.1. Onboarding meeting

2.1.1.1. Type

2.1.1.1.1. In-person

2.1.1.1.2. Phone

2.1.1.1.3. Virtual

2.1.1.2. Date/Duration

2.1.1.3. Attendees

2.1.1.4. TA Referral

2.1.1.4.1. Yes

2.1.1.4.1.1. Triggers technical assistance (need to track somehow but can be off-boarded from CRM)

2.1.1.4.2. No

2.1.2. Monthly check-in meeting

2.1.2.1. Type

2.1.2.1.1. In-person

2.1.2.1.2. Phone

2.1.2.1.3. Virtual

2.1.2.2. Date/Duration

2.1.2.3. Attendees

2.1.2.4. TA Referral

2.1.2.4.1. Yes

2.1.2.4.1.1. Triggers "Specialized Assistance"(need to track somehow but can be off-boarded from CRM)

2.1.2.4.2. No

2.1.3. As-needed meeting

2.1.3.1. Type

2.1.3.1.1. In-person

2.1.3.1.1.1. Location

2.1.3.1.2. Phone

2.1.3.1.3. Virtual

2.1.3.2. Theme

2.1.3.2.1. Follow-up meeting

2.1.3.2.2. Community meeting

2.1.3.2.3. Other

2.1.3.2.3.1. Describe

2.1.3.3. Date/Duration

2.1.3.4. TA Referral

2.1.4. Revision of Monthly Report (performed using portal provided by PRDOH)

2.1.4.1. Account information

2.1.4.2. POC

2.1.4.3. Month/year

2.1.4.4. Report approved?

2.1.4.4.1. Yes

2.1.4.4.1.1. Copy of GCP portal receipt

2.1.4.4.2. Pending incorporation of comments

2.1.4.4.2.1. Date comments sent

2.1.4.4.2.2. Copy of email/comments

2.1.5. Revision of Deliverables

2.1.5.1. Account information (including community + POC)

2.1.5.2. Deliverable (pick list)

2.1.5.3. Date received

2.1.5.4. Deliverable approved?

2.1.5.4.1. Yes

2.1.5.4.1.1. Copy of approval email

2.1.5.4.2. Pending incorporation of comments

2.1.5.4.2.1. Date comments sent

2.1.5.4.2.2. Copy of email/comments

2.2. Technical Assistance (process)

2.2.1. Request (intake)

2.2.1.1. Account information

2.2.1.2. POC for TA request

2.2.1.3. Theme

2.2.1.3.1. Planning Framework

2.2.1.3.2. Community participation

2.2.1.3.3. Program tools

2.2.1.3.4. etc

2.2.1.4. Problem description

2.2.1.5. Program Facilitator Notes

2.2.1.6. Action Needed

2.2.1.6.1. Immediate assistance (ends process)

2.2.1.6.2. Systematic approach

2.2.1.6.2.1. (Assign internal TA provider)?

2.2.1.6.3. Referral (external resources or capacity building workshop) (ends process)

2.2.2. Analysis

2.2.2.1. Organizational/individual capacity/needs analysis (notes)

2.2.2.2. Document/s revision (if needed)

2.2.2.3. Site visit (if needed)

2.2.2.3.1. Working meeting

2.2.2.3.2. Community meeting

2.2.2.3.3. Other meeting

2.2.2.4. Evaluation interview/s (if needed)

2.2.3. Implementation

2.2.3.1. Internal preparation summary (work plan to address need)

2.2.3.2. Delivery summary

2.2.3.2.1. Date

2.2.3.2.2. Attendance

2.2.3.2.3. Type

2.2.3.2.3.1. Virtual meeting

2.2.3.2.3.2. In person meeting

2.2.3.3. Next steps

2.2.3.3.1. Summary

2.2.3.3.2. Issue resolved?

2.2.3.3.2.1. Yes

2.2.3.3.2.1.1. Details

2.2.3.3.2.2. No

2.2.3.3.2.2.1. Reason

2.2.3.3.3. Receipt of TA completion (could be automated email w/ summary of delivery and next steps)

2.2.4. Evaluation

2.2.4.1. Survey sent

2.2.4.1.1. Yes (possible to track follow-up?)

2.2.4.1.2. No

2.2.4.1.2.1. Why?

2.3. Kick-off workshops

2.3.1. Name

2.3.2. Description

2.3.3. Modality

2.3.3.1. In-person

2.3.3.2. Virtual

2.3.3.3. Hybrid

2.3.4. Date/Duration

2.3.5. Attendance

2.3.6. Collateral (supporting documents)

2.3.6.1. Meeting materials

2.3.6.2. Invitations/promotion

2.3.6.3. Agenda

2.3.7. Evaluation survey

2.4. Capacity Building (possible to have a calendar?)

2.4.1. Name of event

2.4.2. Description

2.4.3. Modality

2.4.3.1. In-person

2.4.3.2. Virtual

2.4.3.3. Hybrid

2.4.4. Date/duration

2.4.5. Attendance

2.4.6. Collateral

2.4.6.1. Agenda

2.4.6.2. Meeting materials

2.4.7. Evaluation survey

### **3. KPI/Reports**

3.1. Progress of community planning processes (by community)

3.1.1. Milestone achievement (Program has a total of 8 Milestones)

3.2. Number of completed Community Resilience Plans

3.3. Internal performance (needs work)

3.3.1. Case management performance/characteristics

3.3.2. Technical assistance performance/characteristics

3.3.2.1. Number of completed technical assistance

3.3.2.1.1. Turnaround time

3.3.3. Capacity building performance/characteristics

3.3.4. Kick-off workshop performance/characteristics

3.3.5. Type and number of services performed/characteristics

3.4. Account characteristics (for example, number of working groups, number of Program participants)

3.5. Number of concerns/incidents reported by communities sorted by type