EWB-USA PROJECT PROCESS MANUAL

Version 1.6: Updated June 2025

For questions, suggested changes and bad links please contact:

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INTRODUCTION & INSTRUCTIONS

This document is intended to serve as a central reference for operations related to the EWB-USA International Community Program project process. All resources and information contained in this document were developed to assist Chapters in navigating the typical processes, procedures and requirements for ICP projects. This manual also holds the answers to many common questions, issues and errors, as well as detailed content on the Volunteer Village online platform. The contents of this document are continuously updated to reflect the evolving conditions of our work, feedback from ICP project teams, and to improve usability. Please contact your Program Engineer with any questions related to this document or your Chapter's activities.

To effectively utilize this document in digital form, we recommend becoming familiar with the built-in hyperlink functionality within many words and phrases. These links, highlighted in blue underline, will send the user directly to specific content relevant to the link. This could be a section within the manual, a template document for download, or to one of many reference articles and process explanations in Volunteer Village. To utilize the hyperlink function, just press the Ctrl key + click directly on the highlighted word or Table of Contents.

ACRONYMS

The following acronyms are references throughout this manual and all related materials from EWB-USA.

ESC	Engineering Service Corps (EWB-USA expert services)
EWB-I	Engineers Without Borders International
EWB-USA	Engineers Without Borders USA
H&S	Health and Safety
IA	Impact Analysis
ICP	International Community Programs (EWB-USA international partnerships directly with communities)
IIR	Interim Impact Review
ISOS	International SOS (EWB-USA's security and safety provider)
LL	Lessons Learned
M&E	Monitoring and Evaluation
MOU	Memorandum of Understanding
NGO	Non-governmental organization
PDR	Public and Donor Relations Team
PE	Program Engineers
PMEL	Planning, Monitoring, Evaluation and Learning
PPE	Personal Protective Equipment
PSP	Project Safety Plan
REIC	Responsible Engineer in Charge
SCC	Standing Content Committees
SDG	Sustainable Development Goal
TAC	Technical Advisory Committee (this is now covered by ICP Reviewers)
ToC	Theory of Change
ToR	Terms of Reference
TSP	Travel Safety Plan
VET	Volunteer Engagement Team
VOB	Volunteer Opportunity Board
VV	Volunteer Village

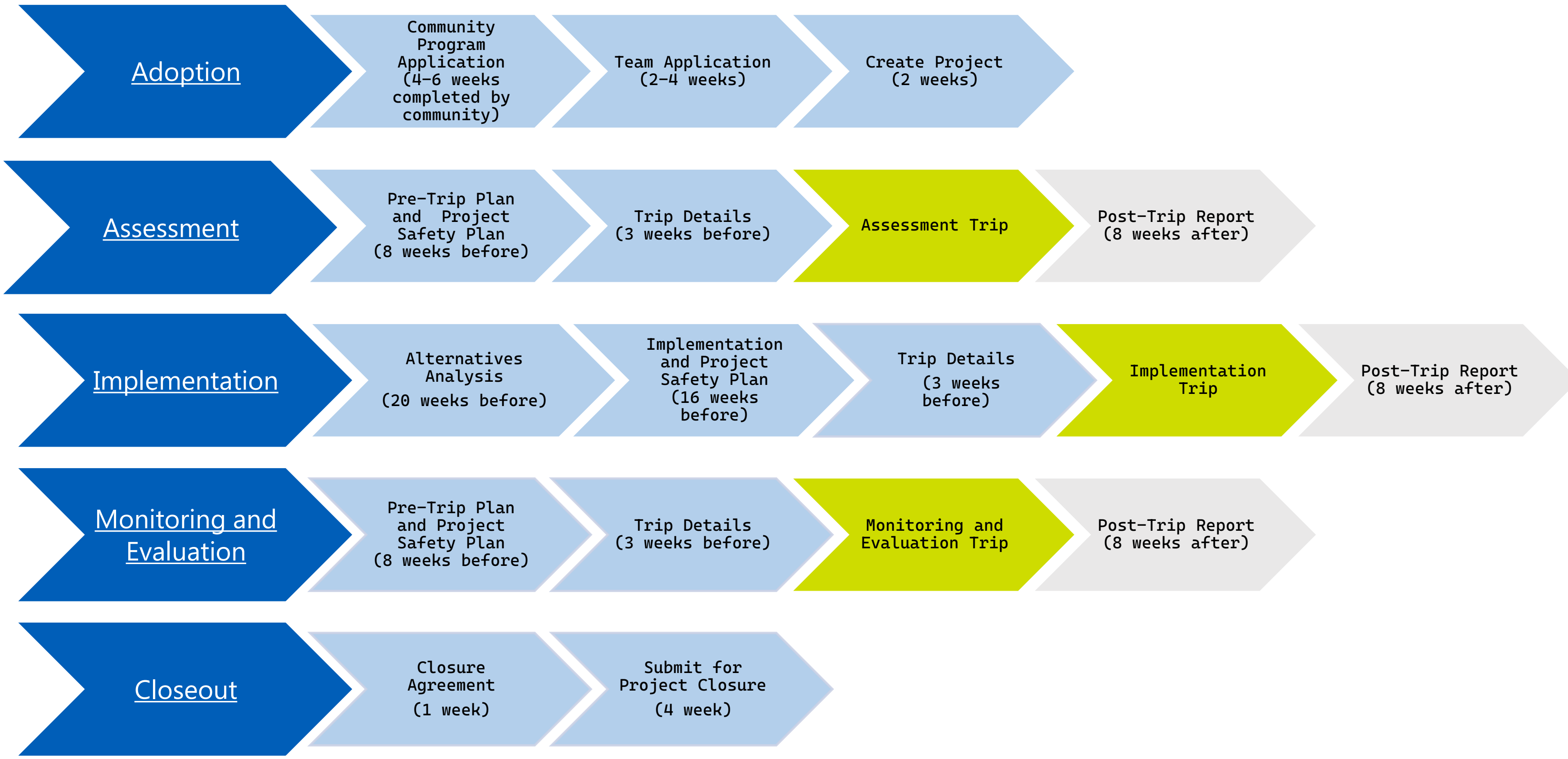
DEFINITIONS

Assessment Phase: An EWB-USA project that is in the assessment phase takes a critical look at the project parameters and proposed possible project solution for an existing community problem, both technical and social aspects.
Closed Program: A program that no longer has an active chapter working with the community. All projects within the program have been completed or closed.
Community Based Organization (CBO) or Community Partner: Organized leadership committee or group in the community that represents the overall community perspective and priorities.
Community-driven model: A model for international development that encourages projects started by the request and motivation of the host community. The model does not support the "old" hand-out development model, but seeks to encourage self-advocacy on behalf of the beneficiary communities.
Community Program: A minimum five-year partnership between a community, an EWB-USA chapter, and a local partner (NGO and/or local government) to carry out projects that meet the identified and agreed upon needs of a community. A program can be comprised of one or more projects.
Design Phase: An EWB-USA project that is in the design phase is being designed by a chapter and reviewed by EWB-USA staff engineers and ICP Reviewers.
EWB-USA Headquarters: Based in Denver, Colorado. Is an operating body of the organization to ensure quality control, data collection, and reporting of Chapter projects. In addition to this, EWB-USA HQ also provides technical and general support and guidance to chapters and in-country staff.
EWB-USA Chapters: This is the organizational structure for EWB-USA's volunteer groups who are in charge of implementing projects. (80% of chapters are student groups affiliated with universities in the United States, while the other 20% are professional groups affiliated with a specific city or region in the United States.
EWB-USA Members: Members are individual volunteers in the organization who may or may not be a member of an EWB-USA chapter.
EWB-USA Community Partners: Communities are the in-country owners and beneficiaries of the projects designed and implemented with EWB-USA's support.
EWB-USA Country Office: A country based satellite office that operates within a specific country on behalf of EWB-USA HQ. The field office will support chapter visits, vet new projects, local partnership development, provide communication services for communities as well as logistical support for chapter visits. Currently, Country Offices are located in Guatemala, Nicaragua, and Uganda.
Impact Report: Study conducted by EWB-USA staff and volunteers to evaluate projects in a country.
Implementation Phase: An EWB-USA project that is in the implementation phase is one where an active physical process is underway. For example, the construction of a building, water systems, or other project all would take place during the implementation phase.
Local Partner: A country based NGO, local agency, or local government that partners with EWB-USA on a community project. They often serve as liaison between EWB-USA chapters and the beneficiary community. Typically a local NGO has an ongoing relationship with a community. Local NGOs can be U.S.-based, but must have permanent in-country staff for EWB-USA to consider them as an official local partner.
Monitoring Phase: An EWB-USA project in the monitoring phase is being actively monitored by EWB-USA HQ and also the chapter in order to determine that the project continues to be successful.

Unassigned Project: An approved community project that has been reviewed by the Application Review Committee (ARC) and is waiting for a partnering chapter to partner with all stakeholders, to then begin the assessment phase.
PMEL: Planning, Monitoring, Evaluation and Learning: EWB-USA's process for incorporating monitoring and evaluation throughout project cycles to ensure proper execution and incorporation of key lessons learned into organizational processes.
Project: An engineered solution designed to resolve a basic need identified by the community.
Project Type: EWB-USA works with six project types, including: water supply, sanitation, civil works, agriculture, structures, and energy.
Project Category: EWB-USA categorizes projects into project categories based around PMEL indicators and outcome statements.

EWB-USA PROJECT PROCESS

Process Breakdown



1. Timeline shows mandatory lead time for submission before travel and deadlines for post-trip reports, based on departure and return dates.
2. This is the process for a standard project with one implementation. Continued Implementation plans can be used for projects with multiple phases.

ADOPTION | Assessment | Implementation | Monitoring & Evaluation | Closeout

COMMUNITY PROGRAM ADOPTION PHASE

Summary: The Adoption Phase is designed to partner chapters with communities. Prior this stage, communities interested in partnering **with EWB-USA have already applied and satisfied the** criteria for new project and partnership. Chapters begin this phase by confirming they are eligible for adoption of a new international community project. Once eligible, the chapter is then able to review the unassigned project list and submit a team application to adopt a unassigned project. This application then undergoes a review and approval process to ensure the chapter are a successful match with the in-country partners. After final approval, the chapter can create a project record in Volunteer Village based on the identified community need from the Community Application.

TEMPLATES & TOOLS

Community Application

Project Management Tools

PMEL

Team Application Preparation Template

Prerequisites: Before beginning the Adoption Phase, it is recommended that the chapter begin assembling a team of volunteers, mentors, and a Responsible Engineer In Charge (REIC) that suit the potential scope of work. Also, the chapter must be in good-standing and meet all eligibility requirements to start a new international community project.

Steps for Community Program Adoption: Please reference the table below for instructions and review criteria for the three main steps of this phase (chapter eligibility, team application, create new project record).

New Community Partnership *	Step	Deadline	Where to submit	More Info
	Chapter Eligibility	Recommended 2 weeks prior to applying	Contact Gretchen Smithwick to determine eligibility	- Instructions - Review Criteria
	Submit Team Application	Applications are reviewed after the 1st and 15th of each month	Team Application	- Instructions - Review Criteria
	Create New Project Record	10 weeks before travel	Project section of Program Page	- Instructions - Review Criteria
Click here: Instruction for New Partnership within an Existing Program				

Next Steps: Following approval of the Team Application and New Project, the chapter will begin contacting the community, local Non-Governmental Organization (NGO) / Government partners, and begin preparations for the Assessment Phase.

Keys to Success:

- Assemble a qualified project & mentor team with a variety of skills to support requirements of the project
- Establish a fundraising plan based off initial project cost estimates
- Review the Project Management Tools for help planning the project and the schedule

ASSESSMENT PHASE

Summary: The Assessment Phase is designed to establish connections with the community partners, gather data needed for your alternatives analysis, design, and to assess the baseline conditions for the Planning, Monitoring, Evaluation and Learning (PMEL) documentation. Proper planning is needed throughout this phase to ensure that the travel team are safe and have sufficient time to accomplish all objectives. This is assisted in part through the technical report and trip record procedures required before and after travel.

TEMPLATES & TOOLS

Assessment Pre-Trip Plan

Project Safety Plan

Assessment Post-Trip Report

Community Agreement – Project Partnership

Trip Budget Worksheet

Volunteer Waiver Agreement

During the initial visit it is also important to meet with the community and local stakeholders to discuss their expectations of the project, establish lines of communication, and review the required community agreements. This trip also serves as the main opportunity to collect technical data that may be required for engineering analysis and design. Often this data will require additional logistical considerations such as equipment, training, and contracting / outsourcing that should be accounted for in pre-trip planning. After travel, you will summarize the data collected in a report and describe the next steps.

Prerequisites: Before beginning the Assessment Phase, the chapter must have completed all steps in the previous Community Adoption Phase. Assessments may also be required if there are changes to the project conditions or scope. If this occurs, please consult with your PE.

Steps for Assessment Phase: Please reference the table below for instructions and review criteria for all pre & post-assessment trip requirements. For a full list of items that need to be submitted see the Pre-Trip Plan submittal list and Post-Trip Report submittal list.

	Step	Deadline	Where to submit	More Info
Before Trip	Assessment Pre-Trip Plan	Minimum 8 weeks before travel	As a technical plan on the trip record	- Instructions - Review Criteria
Before Trip	Project Safety Plan	Minimum 8 weeks before travel	Upload on technical plan on the trip record	- Template - Project Safety Plan Companion
Before Trip	Trip Details	Minimum 3 weeks before travel	On trip record (See here for full list of requirements)	- Instructions - Review Criteria
		Assessment trip		
After trip	Assessment Post-Trip Report	8 weeks max. after travel	As a technical plan on the approved technical plan on trip record	- Instructions - Review Criteria

Next Steps: Following the Assessment trip, your chapter will evaluate the information and decide whether or not to continue with the project (go/no-go decision). If you decide to continue with the project, you begin the Implementation Phase by starting the Alternatives Analysis or conduct a second Assessment trip beginning this process again. A maximum of two assessment trips will be allowed for any project. A maximum of one trip for projects in countries with a country office.

Keys to Success:

- Review the Assessment Checklist for general assessment guidance
- Review the Project Safety Plan knowledge article
- Also review the appropriate checklists for your project type (water supply, latrine, structural, etc.) to make sure your plans are on-track to meet minimum requirements
- Communicate with your community and local partners to determine travel dates that work best for them. Consider local holidays and weather when scheduling
- Adequately prepare for community discussions and data collection activities
- Discuss the 5% community cash contribution with community members to ensure an appropriate plan is in place prior to implementation
- Sign the Project Partnership Agreement
- Communicate regularly with your assigned Program Engineer at HQ
- Reference the Good Example Spreadsheet for examples of great reports in the assessment phase

Adoption | Assessment | IMPLEMENTATION | Monitoring & Evaluation | Closeout

IMPLEMENTATION PHASE

Summary: The Implementation Phase is where the chapter and community members: analyze and select the most appropriate design alternative, prepare the full engineering design, receive feedback from ICP reviewers, and construct the project. Proper planning and design analysis is required to develop a sustainable solution that the community will be able to maintain. This includes comprehensive engineering designs appropriate for the project context, as well as considerations for the ease of long-term operation, maintenance and training. For a breakdown of the steps involved, see the Implementation Flow Chart. After travel, the team will document the work that was completed through a post-trip report.

TEMPLATES & TOOLS

Alternative Analysis Template

Implementation Pre-Trip Plan Template

Project Safety Plan

Budget Worksheet

Community Agreement - Implementation

Implementation Post-Trip Report Template

Prerequisites: Before beginning the Implementation Phase the chapter must have completed all steps in the previous Assessment Phase Including: Assessment trip, Initial Baseline Data Collection for PMEL, and signed Community Agreement – Community Partnership.

Implementation Phase Steps: The table below details the steps in the Implementation Phase. Follow the links for detailed instructions for submitting and review steps needed for approval. For a full list of items that need to be submitted, see the Alternative Analysis, Draft Implementation Pre-Trip Plan, Final Implementation Pre-Trip Plan , Continued Implementation Pre-Trip Plan, and Post-Trip Report submittal list. On large projects with phased construction, the initial Implementation may be followed by Continued Implementation trips to construct subsequent phases. *The process for Continued Implementation is slightly different* - please view here for the full details.

Steps for Implementation Phase: Please reference the table below for instructions and review criteria for all pre & post-assessment trip requirements. For a full list of items that need to be submitted see the Pre-Trip Plan submittal list and Post-Trip Report submittal list.

	Step	Deadline	Where to submit	More Info
Before Trip	Alternative Analysis	Minimum 20 weeks before travel	As a technical plan on the Assessment trip record	- Instructions - Review Criteria
	Draft Implementation Pre-Trip Plan	Minimum 16 weeks before travel	As a technical plan on the implementation trip record	- Instructions - Review Criteria
	Draft Project Safety Plan	Minimum 16 weeks before travel	With the draft on the implementation trip record	- Template - Project Safety Plan Companion
	Final Implementation Pre-Trip Plan	Minimum 8 weeks before travel	As a technical plan on the implementation trip record	- Instructions - Review Criteria
	Final Project Safety Plan	Minimum 8 weeks before travel	With the final on the implementation trip record	- Template - Project Safety Plan Companion

	Trip Details	Minimum 3 weeks before travel	On the trip record (See here for full list of requirements)	- Instructions - Review Criteria
Implementation trip				
After trip	Implementation Post-Trip Report	Maximum 8 weeks after travel	As a technical plan on the approved Implementation trip record.	- Instructions - Review Criteria

Next Steps: Following the Implementation trip, the chapter will evaluate the community partnership and determine if the next step is to conduct an assessment for a new project in the same community, conduct an assessment for a new community partnership in the same region, conduct a Continued Implementation, or monitor the existing implementation a year later and close the project.

Keys to Success:

- Thoroughly consider all potential solutions during the alternatives analysis
- Review the Project Safety Plan knowledge article
- Complete full design and implementation reports with input and certification from the REIC, mentor team and ICP reviewers.
- Find a qualified mentor and travel team members to facilitate construction
- Ensure the project record is up to date with all activities (dates, costs, details)
- Communicate with your community and local partners to determine travel dates that work best for them. Consider local holidays and weather when scheduling construction activities.
- Ensure the project implementation agreement is signed
- Communicate regularly with your assigned Program Engineer at HQ
- Review the appropriate checklists for your project type (water supply, latrine, structural, etc.) to make sure your plans meet minimum requirements
- Reference the Good Example Spreadsheet for examples of great reports in the implementation phase

Adoption | Assessment | Implementation | MONITORING & EVALUATION | Closeout

MONITORING AND EVALUATION (M&E) PHASE

Summary: The Monitoring and Evaluation Phase is designed to help the Chapter and EWB HQ learn about the performance of previously constructed projects. EWB-USA has a detailed program for standardizing the reporting of both Lessons Learned and Monitoring and Evaluation data across all programs. During the M&E trip, the project team will investigate the performance of the project, the maintenance tasks the community has completed, and the capacity of the community to continue to maintain the project into the future. The chapter will be expected to gather evaluation information to track the progress of the projects against the planned activities and to measure the progress made in achieving partnership objectives and the overall goals discussed at the beginning of the project. Some chapters may also need to perform limited maintenance work, complete training with the community, or share updates to the O&M manual. After travel, the team will summarize the data collected in a report, plan for next steps and report PMEL data. Monitoring must be conducted by the chapter and cannot be conducted by the community or the partner NGO.

TEMPLATES & TOOLS

M&E Pre-Trip Plan

Project Safety Plan

M&E Post-Trip Report

Community Agreement – Acknowledgement of Completion

Budget Worksheet

Prerequisites: Before beginning the Monitoring and Evaluation Phase the chapter must have completed all steps in the Implementation Phase Including: complete all construction activities and documentation for the project(s), and wait approximately one year post construction.

Steps for Monitoring & Evaluation Phase: Please reference the table below for instructions and review criteria for all pre & post-assessment trip requirements. For a full list of items that need to be submitted see the Pre-Trip Plan submittal list and Post-Trip Report submittal list.

	Step	Deadline	Where to submit	More Info
Before Trip	M&E Pre-Trip Plan	Minimum 8 weeks before travel	As a technical plan on new trip record	- Instructions - Review Criteria
	Project Safety Plan	Minimum 3 weeks before travel	With the draft on the implementation trip record	- Template - Project Safety Plan Companion
	Trip Details	Minimum 3 weeks before travel	On trip record (See here for full list of requirements)	- Instructions - Review Criteria
Monitoring and Evaluation trip				
After trip	M&E Post-Trip Report	Maximum 8 weeks after travel	As a technical plan on the approved M&E trip record	- Instructions - Review Criteria

Next Steps: Prior to the Monitoring and Evaluation trip the chapter will communicate with the community and determine if this will be the final trip. If so, proceed with closing the project and community agreements.

Keys to Success:

- Thoroughly plan monitoring, training and maintenance activities in advance of travel
- Collect M&E data and report though PMEL process
- Review the Project Safety Plan knowledge article
- Review your team's operation & maintenance documents to ensure they are clear and accurate
- Discuss future plans with your community partners and relay plans through post-trip reports
- Communicate regularly with your assigned Program Engineer at HQ
- Review the appropriate checklists for your project type (water supply, latrine, structural, etc.) to make sure your plans meet minimum requirements
- Reference the Good Example Spreadsheet for examples of great reports in the implementation phase

CLOSEOUT PHASE

TEMPLATES & TOOLS

[Community Agreement – Acknowledgement of Completion]

Summary: The Closeout Phase is the process of ending the community partnership through either completion of all projects or cancellation. It is important to work with the community through this process. A partnership closure agreement will be signed laying out the responsibilities of all parties going forward and to ensure a clear understanding by all parties that the partnership with EWB-USA and the community has ended.

Prerequisites: Before beginning the Closeout Phase the chapter must have completed following steps: Finish all construction and monitoring activities, confirm the system and community are prepared for long term operation, discuss future plans with community.

Steps for Closeout Phase: Please reference the table below for instructions and review criteria for project completion or cancelation.

	Step	Deadline	Where to submit	More Info
Completion	Completion Details	Within 3 months of Partnership Completion	Partnership Complete Button	- Instructions - Review Criteria
	Agreement	None	Upload to project record	- Instructions - Review Criteria
Cancelation	Cancelation Details	None	Partnership Cancelation Button	- Instructions - Review Criteria
	Agreement or Documentation	None	Upload to project record	- Instructions - Review Criteria

Next Steps: Following the approval of the closure the chapter will be evaluated for their performance and may be allowed to adopt a new project.

Keys to Success:

- Create, fill out, and submit for approval the Partnership Completion/Closure record.
- Clearly communicate expectations of closure with local stakeholders
- Upload Partnership Closure Agreement to the chatter feed on the record
- Ensure all project records are updated and accurate
- Communicate regularly with your assigned Program Engineer at HQ

GETTING HELP WITH VOLUNTEER VILLAGE

EWB-USA HQ staff is here to help chapters navigate Volunteer Village and support you in your work with your community. There are a number of different ways to get help.

Program Engineer

Program Engineers are assigned for every project based on the country where your project is located. You can reach out to your program engineer for any question and the PE will be able to answer your question or point you in the right direction. There are many ways to contact a PE.

Comment using chatter on any record in Volunteer Village. When you do this be sure to use "@" and then the PE's name. The advantage of this is that you don't have to explain which project or page in Volunteer Village your comment is about. These comments are visible to other users. This is a good way to keep important messages associated with a record.

Message in Volunteer Village: Good for small questions in Volunteer Village. These will not be directly associated with any pages so be sure to share information about what project or record you are talking about. These are not visible to other users.

Email: Communicate out of Volunteer Village. Good way to include other volunteers of the chapter who are not members of Volunteer Village.

Phone or webcall (Calendly links for each PE): Each PE maintains a list of times available for calls in the web service calendly. You can schedule a call anytime you need using this link. These schedules include times that are available during regular working hours. If you need a different time, you can email your program engineer to request additional times.

Volunteer Village Training Sessions

Volunteer Village Training Sessions are live webinars with HQ staff that you can schedule or join. These are general trainings on any topic not intended to solve an immediate problem but to learn about the system and make your experience easier. They are great for new project leads. This article describes the steps to schedule a VV Training Session, links to previously record sessions and the upcoming schedule of calls.

Submitting Support Tickets

In Volunteer Village, there is a support ticket system. Support tickets can be created under the upper right menu by clicking on your name. Some of the common support tickets created include: Requesting Leadership Access, Updating Chapter Leadership Roles, Making bulk record changes.

VOLUNTEER VILLAGE LEVELS OF ACCESS

Public Access: The public has access to articles and basic information in Volunteer Village without logging in to VV.

General Volunteer Access: Join EWB-USA to become a member and gain access to Volunteer Village projects, discussion forums, and more. Once a member has joined, they will automatically receive a Volunteer Village account. Upon logging in, members are given a volunteer profile, access to chatter feed and groups, the ability to affiliate with a chapter, and access to generally shared, approved project work within your chapter.

Leadership Access:

> **Project Access**: Volunteer Members will need to request or be given this level of access. This includes access to all approved project work from your chapter or other chapters. You will also have access to any new or pending project work from your chapter that is shared with you. This level of access will allow a member to work on ongoing project documentation.
>
> **Chapter Officer Access**: Members with specific leadership roles within their chapters can also be given chapter officer access to view documents that are specific to their roles, such as financial reporting and technical plan documents. Chapter officer roles should be updated following elections to insure the correct approvals of key elements and inclusion on important communication. This includes updating former chapter officers as well.

This article describes the current process for gaining increased access to Volunteer Village.

Common Errors that indicate a lack of permissions in Volunteer Village:

- When trying to access a page in Volunteer Village, if you get the message below you either don't have the correct level of access or the page is not shared with you/

Oops!

You may not have access to this page or it may have moved.
Use the **search bar** above to find what you're looking for or **click here** to go home.

- If another chapter member says that a trip or other record has been created and it doesn't show up on your list. This could mean that you don't have the correct level of access or the page is not shared with you. Check this dashboard to see if you get the error above viewing any of your chapter's unapproved records.

- If you look at your homepage in Volunteer Village and do not see the tabs “ICP Projects” or “Finances” then, you don’t have project access.

VOLUNTEER VILLAGE TIPS AND TRICKS

Tagging Members

Tagging members by typing "@", then typing their name and selecting it from the list. Tagging works in private messages and chatter messages. By tagging the member, the system will notify them by email of the message. Tagging is a critical step because it is unlikely they will see the message otherwise. If you are responding to their message, everyone tagged in the feed will be notified of the message. If you reply to a message generated by the system by email, it will add the message to the feed.

Partial Word Searching

In search boxes you can use the asterisk after partial phrases to look up incomplete text (i.e. Cent* will narrow down results to get Central Montana Technical and Agricultural Institute)

Minimum Requirements for Submitting

Red boxes or asterisks on forms will show you the minimum information required before the system will allow you to save.

Clone Items

You can use the clone button to copy a task you are working on; this can be helpful for bringing standard information to a new record.

User Permissions and Sharing

There are two steps to be able to see trips your chapter is working on. You need a Volunteer Village account with Leadership access. This can be achieved by creating a support ticket using the "Contact Support" tab on the home page. Also, you will need the page shared with you. Submit a support ticket or ask your program engineer to share the page with additional members or the whole chapter.

If you are working with multiple chapters you will need to manually share records outside of your primary chapter affiliation.

Diagnosing Error Messages

"No applicable approval process was found."

This means that one or more key pieces of information is not included in the record or that a field in that record is completed incorrectly. Please review the instruction for the specific record you would like to submit to determine what is missing. Typical errors could include: all sections must be set to "completed", check that the pre-trip deadline hasn't passed, check that trip contacts are complete, verify that the owner of the trip is submitting for approval, etc. If the error persists, contact your PE or use the "Contact Support".

Search Bar

The search bar at the top of Volunteer Village is very powerful. It will search all files and records for key terms. After entering a search term, there will be a list on the left hand side of the screen which will allow you to filter results by record type. Try using articles, projects, and files to see the types of records available.

PROJECT MONITORING EVALUATION AND LEARNING (PMEL)

This is a simple description of the PMEL reporting requirements in Volunteer Village. For more detailed resources view the PMEL article.

Indicators

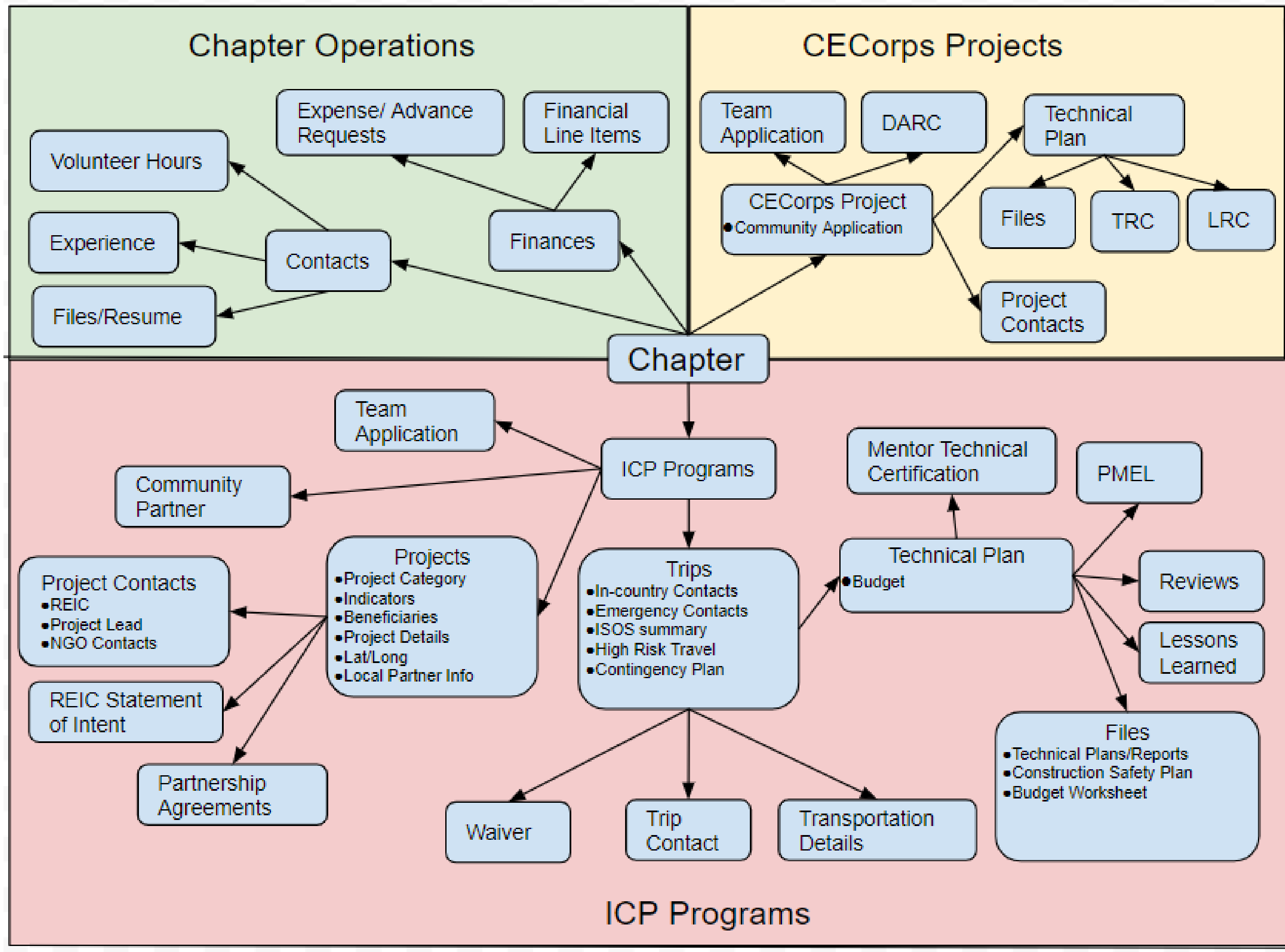
Indicators are specific pieces of data that are used to determine the performance of a project. For each project category, EWB-USA has selected questions that will be aggregated across the organization so that EWB-USA can track project performance and use this information to improve project selection and design. These indicators fall into three categories:

1. Quality and Functionality (How well the constructed project is working),
2. Maintenance (How well the community is maintaining the project), and
3. Community Capacity (How well is the community organizing to provide skills, resources, knowledge, and organization to support project(s) long-term).

Each project category, a group of projects with similar technology and outcome statements, has a standard list of indicator questions. Chapters will report on those indicators before and after construction. The chapter should measure the indicators each time they return to the community after the construction. More information on Indicators can be found in the Project Monitoring Indicators Article.

Indicators are reported in the PMEL Object (located on details/files tab of Technical plan record). The object is automatically created pre trip when the project is set up. During the first assessment trip and before construction the indicators should be answered about existing conditions (baseline). After construction, report on the project results. All projects should be monitored on each trip.

VOLUNTEER VILLAGE DATABASE STRUCTURE



Notes:

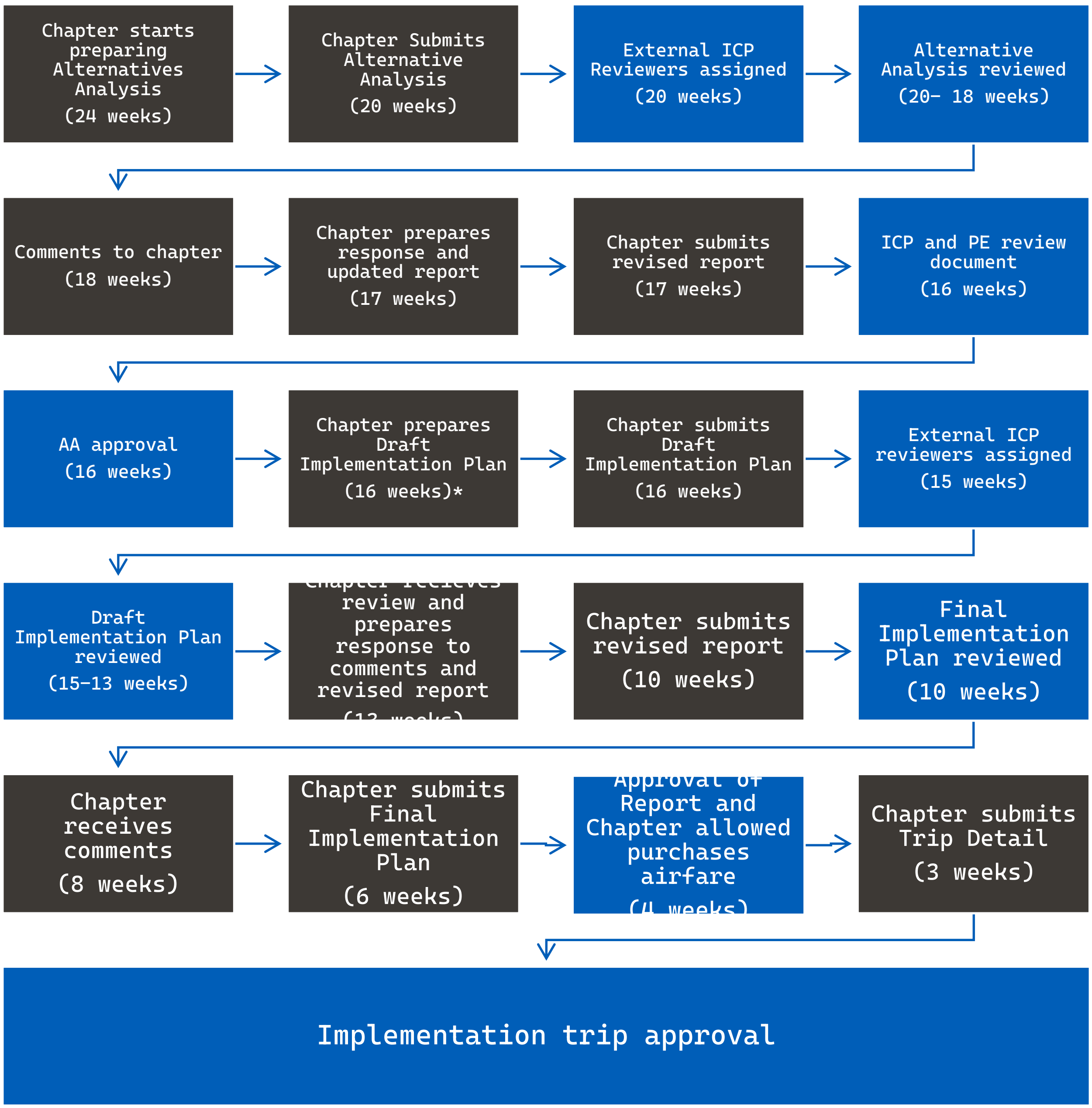
- Indirect Relationships and Role ups not shown.
- Fields on the "Overview" tab are shown with bullets.
- Arrows to other bubbles are found on the "details/files" tab.
- For CO direct implementation structure is the same as ICP with EWB-USA Staff as the chapter

Related List

• Info on Overview Tab

IMPLEMENTATION REVIEW FLOW CHART

Please review all steps when preparing for implementation. Tasks in Orange are chapter actions. Tasks in Blue are EWB-USA HQ actions. All dates are before the travel dates. This is a suggested minimum timeline, some chapters need less time, some need more.



*Assumes chapter's first choice was approved and that the chapter was preparing the Implementation Plan during the review of the Alternatives Analysis. Most chapters will need a longer process here.

DOCUMENTS AND INFORMATION NEEDED FOR THE EWB-USA PROJECT PROCESS

This section has nine tables with complete lists of all the items that need to be submitted for the Pre- or Post-Trip reporting. These tables serve as checklists of information that you will need to enter into VV as part of the EWB-USA project process. The tables do not include all tasks that need to be done like internal QA/QC, travel planning, fundraising, requesting funds to travel/construct, etc. The project process flow chart provides a more detailed picture of all the task that need to be done from a chapter perspective.

Table 1 – Documents/information needed for an Assessment Trip Pre-Trip Plan

Document/Information	Template/Information needed	Due Date
Pre-trip Plan Submittal: Instructions		
Create a Trip Record	Create a Trip Record The trip record will be finalized after plan approval but will be the folder to store the technical plans.	8 weeks prior to departure
Assessment pre-trip plan and Project Safety Plan	Assessment Pre-Trip Plan Template Project Safety Plan Template	8 weeks prior to departure
Unsigned Project partnership Agreement	Project Partnership Agreement	8 weeks prior to departure
Update Project Record	There is no template. All information is entered directly into VV on the Project Record.	8 weeks prior to departure
Project monitoring indicators	There is no template. Review the indicator questions on the PMEL object stored on the assessment technical record. Assistance can be found at Project Monitoring Indicators.	8 weeks prior to departure
EWB-USA Trip Budget Worksheet	Budget Worksheet Also, enter the summary values on the technical plan record "overview" tab.	8 weeks prior to departure
Mentor team information	All mentor profiles must be complete in VV and a mentor technical certification required on technical plan record.	8 weeks prior to departure
Submit Trip for Approval: Instructions		
Travel Safety Plan	There is no template. All information is entered directly into VV. And an automated document is produced after trip approval.	3 weeks prior to departure
Acknowledgements by Project Lead, HSOs, and REIC	This is included in the electronic waiver text based on the role of the traveler.	3 weeks prior to departure

Volunteer Waiver Agreement	Volunteer Waiver / Agreement signed electronically	3 weeks prior to departure
High Risk Travel (may not apply to all travel)	There is no template. High Risk Travel requirements are added to the trip record "overview" tab. High Risk acknowledgement is now part of the electronic waiver.	3 weeks prior to departure
Small Travel Team / Extended Stay (may not apply to all travel)	There is no template. All information is entered directly into VV.	3 weeks prior to departure

Table 2 – Documents/information needed for an Assessment Trip Post-Trip Report

Document/Information	Template/Information needed	Due Date
Incident Report	There is no template. All information is entered into Fast Form via link on VV.	1 week after return
Submit Post Trip Report for Approval: Instructions		
Assessment Post-Trip Report	Assessment Post-Trip Report	8 weeks after return
Signed Project Partnership Agreement	Project Partnership Agreement Uploaded to Agreement Section on Project Record.	8 weeks after return
Update Project Record	There is no template. All information is entered directly into VV on project record.	8 weeks after return
Partnership Monitoring (after all trips)	There is no template. All indicator results are entered directly into VV on PMEL object on the technical plan record "details/files" tab.	8 weeks after return
EWB-USA Post Trip Budget Worksheet	Budget Worksheet Also, enter the summary values on the technical plan record "overview" tab.	8 weeks after return
Lessons Learned	There is no template. All information is entered directly into VV on the technical plan record "details/files" tab.	8 weeks after return

Table 3 – Documents/information needed for an Alternatives Analysis

Document/Information	Template/Information needed	Due Date
Submit Alternative Analysis: Instructions		
Summary of Alternatives	Add a summary of the alternatives on the "overview" tab	20 weeks prior to departure
Alternatives Analysis	Alternatives Analysis Report	20 weeks prior to departure
Mentor team information	All mentor profiles must be complete in VV and a mentor technical certification is required on technical plan record.	20 weeks prior to departure

Table 4 – Documents/information needed for a Implementation Pre-Trip Plan (Draft/Final Design and Project Safety Plan)

Document/Information	Template/Information needed	Due Date
Pre-trip Plan Submittal: Instructions		
Create a Trip Record	Create a Trip Record The trip record will be finalized after plan approval but will be the folder to store the	8 weeks prior to departure

	technical plans.	
DRAFT Implementation Pre-Trip Plan	Implementation Pre-Trip Plan	16 weeks prior to departure
DRAFT Project Safety Plan	Project Safety Plan	16 weeks prior to departure
EWB-USA Trip Budget Worksheet	Budget Worksheet Also, enter the summary values on the technical plan record "overview" tab.	16 weeks prior to departure
Mentor Team Information	All mentor profiles must be complete in VV. Responsible Engineer In Charge (REIC) Requirements, Mentor Technical Certification on Technical plan Record.	16 weeks prior to departure
Project monitoring indicators	There is no template. Review the indicator questions on the PMEL object stored on the implementation technical record. Assistance can be found at Project Monitoring Indicators.	16 weeks prior to departure
Resolve comments on Draft plan and submit plan with any revisions for approval		
Resolve comments	Resolve any comments received this could include scheduling a call with reviewers, submitting a Comment Resolution Matrix, and updating a final version of the plans.	10 weeks prior to departure
Submit Trip for Approval: Instructions		
Travel Safety Plan	There is no template. All information is entered directly into VV and an automated document is produced	3 weeks prior to departure
Acknowledgements by Project Lead, HSOs, and REIC	This is now included in the electronic waiver text based on the role of the traveler.	3 weeks prior to departure
Volunteer Waiver Agreement	Volunteer Waiver / Agreement signed electronically	3 weeks prior to departure
High Risk Travel (may not apply to all travel)	There is no template. High Risk Travel requirements are added to the trip record "overview" tab. High Risk acknowledgement is now part of the electronic waiver.	3 weeks prior to departure
Small Travel Team / Extended Stay (may not apply to all travel)	There is no template. All information is entered directly into VV.	3 weeks prior to departure

Table 5 – Documents/information needed for a Continued Implementation Pre-Trip Plan (Final Design and Project Safety Plan)

Document/Information	Template/Information needed	Due Date
Pre-trip Plan Submittal: Instructions		
Create a Trip Record	Create a Trip Record The trip record will be finalized after plan approval but will be the folder to store the technical plans.	8 weeks prior to departure
Continued Implementation Pre-Trip Plan	Continued Implementation Pre-Trip Plan	8 weeks prior to departure
Final Project Safety Plan	Project Safety Plan	8 weeks prior to departure
EWB-USA Trip Budget Worksheet	Budget Worksheet Also, enter the summary values on the project record "overview" tab.	8 weeks prior to departure

Mentor team information	All mentor profiles must be complete in VV and a mentor technical certification required on technical plan record.	8 weeks prior to departure
Submit Trip for Approval: Instructions		
Travel Safety Plan	There is no template. All information is entered directly into VV and an automated document is produced	3 weeks prior to departure
Volunteer Waiver Agreement	Volunteer Waiver / Agreement signed electronically	3 weeks prior to departure
Acknowledgements by Project Lead, HSOs, and REIC	This is now included in the electronic waiver text based on the role of the traveler.	3 weeks prior to departure
High Risk Travel (may not apply to all travel)	There is no template. High Risk Travel requirements are added to the trip record "overview" tab. High Risk acknowledgement is now part of the electronic waiver.	3 weeks prior to departure
Small Travel Team / Extended Stay (may not apply to all travel)	There is no template. All information is entered directly into VV.	3 weeks prior to departure

Table 6 – Documents/information needed for an Implementation Post-Trip Report

Document/Information	Template/Information needed	Due Date
Incident Report	There is no template. All information is entered into Fast Form via link on VV.	1 week after return
Submit Post Trip Report for Approval: Instructions		
Implementation Post-Trip Report	Implementation Post-Trip Report	8 weeks after return
Community Agreement - Implementation	Community Agreement - Implementation	8 weeks after return
Partnership Monitoring (after all trips)	There is no template. All indicator results are entered directly into VV on PMEL object on the technical plan record "details/files" tab.	8 weeks after return
EWB-USA Post Trip Budget Worksheet	Budget Worksheet. Also, enter the summary values on the project record "overview" tab.	8 weeks after return
Lessons Learned	There is no template. All information is entered directly into VV on the technical plan record "details/files" tab.	8 weeks after return

Table 7 – Documents/information needed for a Monitoring & Evaluation Trip Pre-Trip Plan

Document/Information	Template/Information needed	Due Date
Pre-trip Plan Submittal: Instructions		
Create a Trip Record	Create a Trip Record The trip record will be finalized after plan approval but will be the folder to store the technical plans..	8 weeks prior to departure
Monitoring & Evaluation Pre-Trip Plan And Project Safety Plan	Monitoring & Evaluation Pre-Trip Plan Project Safety Plan Template	8 weeks prior to departure
Project Completion agreement (template)	Community Agreement - Completion	8 weeks prior to departure
Project monitoring indicators	There is no template. Review the indicator questions on the PMEL object stored on the implementation	8 weeks prior to departure

	technical record. Assistance can be found at Project Monitoring Indicators.	
EWB-USA Trip Budget Worksheet	Budget Worksheet Also, enter the summary values on the project record "overview" tab.	8 weeks prior to departure
Mentor team information	All mentor profiles must be complete in VV and a mentor technical certification required on technical plan record.	8 weeks prior to departure
Submit Trip for Approval: Instructions		
Travel Safety Plan	There is no template. All information is entered directly into VV and an automated document is produced	3 weeks prior to departure
Acknowledgements by Project Lead, HSOs, and REIC	This is now included in the electronic waiver text based on the role of the traveler.	3 weeks prior to departure
Volunteer Waiver Agreement	Volunteer Waiver / Agreement signed electronically	3 weeks prior to departure
High Risk Travel (may not apply to all travel)	There is no template. High Risk Travel requirements are added to the trip record "overview" tab. High Risk acknowledgement is now part of the electronic waiver.	3 weeks prior to departure
Small Travel Team / Extended Stay (may not apply to all travel)	There is no template. All information is entered directly into VV.	3 weeks prior to departure

Table 8 – Documents/information needed for a Monitoring & Evaluation Post-Trip Report

Document/Information	Template/Information needed	Due Date
Incident Report	There is no template. All information is entered into Fast Form via link on VV.	1 week after return
Submit Post Trip Report for Approval: Instructions		
Monitoring & Evaluation Post-Trip Report	Monitoring & Evaluation Post-Trip Report	8 weeks after return
Project Completion agreement (signed by stakeholders)	Community Agreement - Completion	8 weeks after return
Partnership Monitoring (after all trips)	There is no template. All indicator results are entered directly into VV on PMEL object on the technical plan record "details/files" tab.	8 weeks after return
EWB-USA Post Trip Budget Worksheet	Budget Worksheet. Also, enter the summary values on the project record "overview" tab.	8 weeks after return
Lessons Learned	There is no template. All information is entered directly into VV on the technical plan record "details/files" tab.	8 weeks after return

EWB-USA POLICIES AND RESOURCES

Volunteer Village has a wealth of information about all aspects of ICP projects in articles. Articles are searchable using the large search bar at the top of volunteer village or using the "explore articles" button where information can be explored by topic.

Technical	Partnerships
Checklists	Communication Best Practices: after ICP Partnership Adoption
Drawing Templates	Community Cash Contribution FAQ
Good Example Projects	Team Application Template (practice only)
Link to YouTube Channel	Online Presentations (Project Kickoff, Sustainability on Assessment Trips)
Project Management Tools	Partnership Criteria
Volunteer Village Dashboards	Partnership Roles and Responsibilities
	Project Process Flow Chart for Project Partners
Chapter Operations	VV Help
Chapter Marketing and Communications Toolkit	Requesting Project Access
Code of Conduct	Volunteer Village Support
Communication Plan Guidance	
Financial Policy	PMEL
Fundraising Information	Beneficiary Numbers
Health & Safety Policy	
	Country Office
Mentor Team	Country Office Overview and Services
RASP	
Mentor team Requirements	

VOLUNTEER VILLAGE INSTRUCTIONS

The following tables contain the Instructions for each approval process as previously mentioned in each respective phase.

Step	Instructions
Chapter Eligibility: Instructions Review Criteria Return to Community Program Adoption	Prior to reviewing a Team Application, the ICP Team and the Volunteer Engagement Team must determine the chapter's eligibility to adopt a project. When the Team Application is submitted by the chapter, the eligibility review will begin automatically. However, chapters are encouraged to reach out to the Senior Program Manager (Gretchen Smithwick) prior to applying so that their potential eligibility can be determined. If multiple chapters are applying for the same project, all chapters that have eligibility issues will not be considered. Please see the Chapter Eligibility for New Community Project article for details regarding the process and criteria.

Team Application: Instructions Review Criteria Return to Community Program Adoption *Related Articles:* Apply to Adopt a Project	These instructions apply to new and existing Chapters. This article provides instructions for chapters to submit an International Community Program (ICP) Team Application to partner with a community on an unassigned international community project. Prior to applying, teams can also access a practice template to prepare responses prior to entering them in Volunteer Village. ONLY APPLICATIONS RECEIVED IN VOLUNTEER VILLAGE WILL BE REVIEWED. **Preparing the Team Application** Chapters can apply to adopt an "Unassigned" project directly within Volunteer Village. Projects that are "Open" or "Unassigned" are not listed on the www.ewb-usa.org website and are only accessible through Volunteer Village. Chapters can all view these projects in the Unassigned Project Dashboard. Within Volunteer Village, the chapter must complete the **Team Application** within the project they wish to adopt. These applications will be received for review on the 1st and 15th of every month. If multiple chapters apply to adopt the same project, each **Team Application** will be reviewed, and the most qualified chapter will be selected to adopt the project. The chapter can improve the chance of adopting a specific project by confirming the chapter's eligibility status prior to applying. **Tips for selecting the best community project for your chapter:** 1. Review the basic scope of work to determine if fits within the technical abilities of your chapter and mentor team. 2. Be sure to check that travel will be allowed to the destination country. Cross reference the location against any national, international, EWB-USA, or University imposed restrictions. 3. Review estimated project costs including travel and the initial estimate provided by the community. Does this fit within your team's fundraising capacity? If not, consider selecting a closer project in a closer location to reduce travel costs. 4. Try to prioritize locations where team members have previous experience and or specific language / cultural knowledge. 5. Review the "Community Challenges" section on the Community Program Application to understand more on the initial project type. This category may change after the chapter conducts a needs assessment on the first assessment trip. 6. *Chapters are not allowed to contact the community until the project has been assigned.* However, you are welcome to visit the NGO partner's website and research the work of the organization. Chapters can also reach out to the Senior Program Manager (projects@ewb-usa.org), if the chapter has additional questions/clarification that are not addressed in the Community Program Application or the Review Summary. **Once the application has been submitted:** Team Applications are closed and reviewed twice per month, on the 1st and the 15th. If a chapter has applied by one of these deadlines the community project is removed from the "Unassigned" list and no more chapters will be able to apply or submit an incomplete application. The Program Engineers will begin reviewing the chapter applications submitted against the Review Criteria. 1. If multiple chapters apply for the same project, all applications will be reviewed against each other and the most qualified chapter will be awarded the project.

Step	Instructions
	2. Chapters are only allowed to adopt one new project at a time. If a chapter has applied to adopt multiple projects, the chapter must identify an order of priority of the projects they applied for to determine the order of application review. When comparing applications, the following factors will be used: 1. Completeness of application, including required Chapter Contacts 2. Eligibility status / Status and quality of existing EWB-USA projects 3. Language Skills and Communication Plan 4. Volunteer and Chapter Capacity 5. Mentor Team qualifications and depth 6. Fundraising capacity + Strength and quality of fundraising plan 7. Quality Management Plan 8. Are they applying for other projects? (Consider their priority of application choice; example: one chapter applying for 3 other projects while another has only applied for the one) After the review, the chapter will be notified with any additional items to address. Once all outstanding items have been addressed, the chapter will be assigned to the project and should reach out to the community and NGO partner to initiate communication and project planning.

Step	Instructions
New Partnership in Existing Program: Instructions Review Criteria Return to Community Program Adoption	New Community Partnerships in existing programs will follow the same process and review criteria as the Community Program Application process. If the partnership is approved, the chapter will submit a Team Application for the new partnership to ensure that chapter has the qualifications and capacity to start a new community partnership and support the existing community partnership in the program.
New Project: Instructions Review Criteria Return to Community Program Adoption *Related Articles:* PMEL Project Management Tools	After your chapter's Team Application for the new community partnership has been approved, the team can create a project in Volunteer Village. New projects can be created under both new and existing programs. Using this new project record, your chapter can then add relevant details around the scope of work and intended beneficiaries for all project activities. The REIC should also complete the statement of intent to confirm agreement of REIC responsibilities for the project. During this time, please also reach out to your PE to discuss the planned activities, implementation schedule, and anticipated costs, among other project details. These contents will all be reviewed and approved before the first trip. The project record is a living document that should be updated throughout the life of the project to reflect activities as completed. This includes any change in project conditions such as transition of team members, changes to the scope of work, stakeholders or other impacting events. . Projects should be limited by the scope that can fit in one implementation plan. Additional implementation plans should be included under new projects. **For a full list of instructions in Volunteer Village, please follow the link below:** **Creating a New Project**

Assessment Pre-Trip Plan: Technical Plan Instructions Review Criteria Return to Assessment Phase Return to Implementation Summary Return to Monitoring and Evaluation Summary	**Pre-Trip Approval Step 1: Technical Plan** These instructions summarize the first of two steps for the pre-trip approval process. EWB-USA . Both steps are required for all trips, regardless of project phase. The pre-trip approval steps include: 1. Approval for a technical plan – Deadlines vary from 20 weeks to 8 weeks before travel, depending on project phase 2. Approval for trip details – All information is required 3 weeks before travel **To get approval for a technical plan:** **Create a Trip Record** After the Program Engineer has reviewed and approved your new project, you are able to create a new trip record in Volunteer Village. This record is required before a technical plan can be created, but does not need to have all details included until the trip approval deadline. **Prepare the Pre-Trip Technical Plan or Report** Each project phase requires different technical report templates and planning requirements. To understand the full requirements for each phase, please visit the corresponding section in this manual. The following templates include the basic pre-trip report outlines that should be completed and uploaded, with corresponding documentation, to the new technical plan record in Volunteer Village (next section). Post-trip technical reports are submitted following return of the team and use different templates to present the trip activities and findings. Both pre and post-trip technical reports must be acknowledged by the chapter mentor/REIC and undergo a series of reviews as part of the EWB-USA Quality Management Process. **Pre-Trip Technical Report Templates** Project Safety Plan Assessment Pre-Trip Plan Alternatives Analysis Report (can be added to assessment or implementation trip record) Implementation Pre-Trip Plan (Draft + Final, Continued) Continued Implementation Pre-Trip Plan Monitoring & Evaluation Pre-Trip Plan **Create the Technical Plan Record and Submit for Approval** The Technical Plan and Report section is on the "Detail/Files" tab of the trip record and is like a folder for the technical reports that will be submitted for each Trip. You can have multiple reports attached to a Trip that are associated with the same or different projects,. If the team plans to visit multiple communities on one in country visit, please ensure the Program Engineer(s) has approved the planned activities at each. Before a chapter can submit a Trip for approval, the Technical Plans & Reports must be submitted and approved. Detailed steps for Submitting a Technical Plan for Approval **Additional items required when submitting a technical plan:** • Project Safety Plan (applies to all phases) • Budget Worksheet • Update Budget Fields on Technical Plan Record • Drawing Templates

Step	Instructions
	• PMEL • PMEL indicators **Upload Community Agreement** Upload your signed Community Agreement corresponding to the phase of the project you are in to the project page for each community partnership. There is a separate agreement signed during each project phase. The Community Agreement - Project Partnership is signed after your first visit with the community. As the design is completed and prior to implementation, you will also sign the Community Agreement - Implementation. At the completion of the partnership, you will also sign the Community Agreement - Acknowledgement of Completion. After these steps your trip is half way to approval. Please continue with the following instructions for Pre-Trip Approval.

Step	Instructions
Assessment Pre-Trip Details: Trip Detail Instructions Review Criteria Return to Assessment Phase Return to Implementation Summary Return to Monitoring and Evaluation Summary	**Pre-Trip Approval Step 2: Trip Details** These instructions summarize the second of two steps to travel on an EWB-USA trip. Both steps are required for all trips, regardless of project phase. The pre-trip approval steps include: 1. Approval for a technical plan - Deadlines vary from 20 weeks to 8 weeks before travel, depending on phase 2. Approval for trip details - All information is required 3 weeks before travel *Instructions* **Completing Trip Record** Once you have created your Trip, created a Technical Plan & Report, and gained approval for the submitted technical plan, you may submit for pre-trip approval. To complete the trip record, **Sub tasks for Completing the Trip Record** Technical Plan Approval Travel Waivers High Risk Travel Small Travel Team Travel Safety Plan (TSP) ICP Health and Safety Resources Creating a trip contact Creating a transportation detail Upload Travel Waivers Trip Contacts

Assessment - Post-Trip: Report Instructions Review Criteria Return to Assessment Summary Return to Implementation Summary Return to Monitoring and Evaluation Summary	**Post-Trip Approval:** There is only one step to follow for approval of the post-assessment report: 1. Post-Trip Technical Report Approval (submitted 8 weeks after return) *Note: Incident reports can be submitted any time after the trip by following the link in the TSP (Travel Safety Plan) **Prepare and Submit Post-Trip Technical Report** After returning from the trip, the chapter should begin preparing the Post-Trip Report. Choose the appropriate template corresponding to each Pre-Trip Plan that was submitted. The purpose of the report is to document the information collected during the trip both for future members of the project team and to provide to the reviewers for feedback. Detailed Instruction for submitting Post-Trip Report. The types of reports and their respective instructions can be found here: Assessment Post-Trip Report Implementation Post-Trip Report Continued Implementation Post-Trip Report Monitoring and Evaluation Post-Trip Report The Post-Trip Report Template provides further details regarding the information that should be included for each specific phase. **Upload Community Agreement** Upload your signed Community Agreement corresponding to the phase of the project you are in to the project page for each community partnership. There is a separate agreement signed during each project phase. The Community Agreement - Project Partnership is signed after your first visit with the community. As the design is completed and prior to implementation, you will also sign the Community Agreement - Implementation. At the completion of the partnership, you will also sign the Community Agreement - Acknowledgement of Completion. **Mentor Acknowledgement** The REIC should add an REIC Technical Certification to the trip record. **Update Project Record** The final step before submitting is to update the Project record. Instructions on how to complete the Project record can be found here. **PMEL Indicator results** The results from indicator monitoring should be updated on the PMEL object for each project that was monitored. **Lessons Learned** Lessons Learned should be added to the technical plan record. **Post-Trip Budget** The budget should be updated by adding the actual costs in the second column of the pre-trip budget. This should be added to the record. The budget values on the technical plan should be updated with the actual costs. **Log Volunteer Hours**

Step	Instructions
	Volunteer Hours can be logged any time but right after a trip is a good time. Volunteer/Mentor Hours Logged **Incident Report** Fill out the Incident Report form right when you return from a trip if there was an incident on the trip. **Related Articles** REIC Technical Certification Drawing Templates Report Templates

<table>
<tr><th>Step</th><th>Instructions</th></tr>
<tr><td>Assessment Pre-Trip Plan: Instructions

Pre-Trip Review Criteria

Return to Assessment Summary</td><td>Assessment Pre-Trip Plan: Instructions

These instructions apply to the creation of the Assessment Phase Pre-Trip Plan. To view the instructions for submitting the plan for review go here.

The purpose of the Assessment Phase is to provide a planning tool for chapters to use to ensure that the pertinent information is gathered during the site assessment visit, and allows EWB-USA HQ Staff to review the trip and make recommendations that are intended to improve the quality of the project. Chapters should:
Assess the economic, social, environmental and technical viability of the project.
Assess project sustainability - the potential for the project to last long-term.
Make a "go/no-go" decision about continuing with the project future design and analysis of the proposed infrastructure at the site.
Collect the necessary field data (including cost data) to design the project
Use the current Assessment Pre-Trip Plan Template and upload as a Word document or PDF with the instructions removed. The template contains detailed instruction for completing the report.

Additional Advice:
Review the Site Assessment Checklist prior to writing the plan to help determine a good outline for the plan.
Use the newest Assessment Pre-Trip Plan Template.
<u>Remove the instruction from the template before uploading.</u>
The plan can be added as a Word document or PDF.
Use Appendices as necessary. For example, community surveys, drawings, etc.…
Attach drawings as an Appendix. Drawings should be readable and to a scale where notes can be taken in the field. It may be good to draw the buildings visible from an aerial in CAD so that field notes can be made. Use the drawing templates.
Document all laboratory and field procedures specifically so that field staff can have a list of what is required.
Layout all planned activities and additional activities in a clear manner so that traveling members do not forget a piece of data.
Arrange to meet the local government officials if applicable.
Include agreements with contractors for review and advice from reviewers; i.e. hydrogeologic assessment, labs, etc.…</td></tr>
</table>

Step	Instructions

Assessment Post-Trip Report: Instructions
 	
Review Criteria
 	
Return to Assessment Summary
	These instructions apply to the creation of the Assessment Phase Post-Trip Report
	
	The purpose of the **Assessment - Post-Trip Report** is to archive, present, and summarize the information gathered during the assessment trip. This may include notes, photographs, sketches, survey information, interview notes, measurements and any other pertinent data. An EWB-USA Program Engineer will review the **Assessment - Post-Trip Report** against the review criteria and provide comments and advice.
	
	Assessment Post-Trip Report Instructions:
	
	Use the current post-assessment template and upload as a Word document or PDF with the instructions removed.
	
	Key Information to include in the Assessment - Post-Trip Report
	• Describe the path forward and how decisions will be made.
	• Include a go/no-go matrix decision matrix to layout future steps
	• Include Appendices to collect all the data collected. These may include the following:
	    • Photos with descriptions
	    • Updated drawings to scale and as an attachment
	    • Summaries of conversations with stakeholders and government officials
	    • Lab results
	    • Test results and procedure summaries
	    • Raw survey data and collection methods
	    • Signed Project Partnership agreement

Step	Instructions
Alternatives Analysis Report: Instructions Review Criteria Return to Implementation Summary	**Alternatives Analysis Report** The Alternatives Analysis report is a Technical Plan & Report document that is attached to the either the last Trip record or a future Implementation Trip record that the chapter has created. The review process for the Alternatives Analysis includes review by the Program Engineer as well as one or more external ICP Reviewers. At a minimum, the PE will assign a Lead ICP Reviewer. Additional ICP Reviewers may be assigned as needed and determined by both the PE and the Lead ICP Reviewer, depending on the technical needs of the project. **Alternatives Analysis Overview** The Alternatives Analysis is prepared using the template found here. The report should focus on decisions that the chapter would like to analyze further and key design elements that will have a major impact on the project. If an option is easily dismissed as a poor alternative, it does not need to be investigated but should be described as considered with reasoning for not pursuing that option. The chapter also should not enter the Alternatives Analysis with a preferred alternative already selected and designed. *This step is designed to be a useful exercise in narrowing down options, getting expert advice, and gauging community buy-in*. Likewise, just because a community has a strong opinion on an option does not make it the best decision. If a chapter's engineering judgment contradicts with a community's opinion, the chapter should work with the community to demonstrate the strength and weakness of the various alternatives and build consensus. To submit the Alternatives Analysis for review, the chapter will create a new technical plan and report on the last assessment trip record and select Alternatives Analysis in the drop down. The Alternatives Analysis should be uploaded on the assessment trip record. Complete the sections preferred alternative and other considered alternatives. Once the record is complete the owner of the page should submit for approval. The Program Engineer will assign an ICP reviewer and will give the reviewer 2 weeks (typically) to review the alternatives and provide comments. There is a specific section of the report where this will be done, but it will not be visible until the comments are ready for the chapter. Once the comments are available, the reviews section will be visible, and the chapter will be able to see the comments provided. The chapter should review the comments and provide responses below each reviewer's comments (before addressing the changes by revising the report). For lengthy comments, the response can be attached to the record in a separate file. The reviewers will come to a decision about the appropriateness of the revisions proposed and the chapter can prepare the changes and notify the PE in chatter when the revisions have been completed. Once the changes have been made, the reviewers will check the changes, make any final suggestions and approve the chapter to proceed with the Alternatives Analysis.

DRAFT Implementation: Pre-Trip Plan Instructions Review Criteria Return to Implementation Summary	**Draft Implementation Pre-Trip Plan Instructions:** This section describes the process for the preparation and review of the Draft Implementation Pre-Trip Plan. The procedure for submitting the plan in Volunteer Village is described here. The plan is prepared on the Implementation Pre-Trip Plan Template. The draft implementation plan is submitted at the same time as the Project Safety Plan (PSP). The REIC should post the REIC technical certification before submitting the plan for approval. The chapter should proceed with the Draft Implementation Pre-Trip Plan after approval of the Alternatives Analysis. Some chapters may elect to prepare portions or all the Draft Implementation Pre-Trip Plan ahead of the Alternatives Analysis, but this may result in extra work if the preferred alternative is not approved. The overall process for the Implementation approval with a typical timeline is shown on the flow chart here. The purpose of the Draft Implementation Phase is to present the 90% design of the project and the details of the proposed implementation in sufficient detail for a contractor to construct the work without input from the chapter. The design should be the quality that would be signed and sealed by a Professional Engineer (for a project in the US). The draft version of the plan should be at 90% design. Both the Draft and Final Implementation Pre-Trip Plan will be reviewed by the Program Engineer at EWB-USA Headquarters office and the International Community Program (ICP) Reviewers. The draft is the first round of two reviews to receive implementation technical approval. The process for the final review is described here. The Program Engineer will re-assign the Lead ICP Reviewer from the Alternative Analysis (if they are available) and any previously assigned ICP Reviewers. The PE may also assign additional ICP Reviewers as needed and determined by both the PE and the Lead ICP Reviewer, depending on the technical needs of the project. Finally, the PE will assign a specific ICP Reviewer to review the health and safety components of the PSP. **Draft Implementation Pre-Trip Plan** The article "submitting a technical plan for approval" describes the steps to submit the plan. **Implementation vs Continued Implementation** If the work that will be done on the implementation trip has been previously approved in another implementation plan, a continued implementation report should be prepared. For continued implementation plans, the pre-trip requirements can be found here. **Draft Implementation Pre-Trip Plan Submission and Review Steps** The chapter begins the process by selecting tentative dates for implementation and creating a new trip. This process is described here. Once the plan is created, suggested deadlines are displayed based on the average time it takes a chapter to move through the review process. Many chapters experience shorter or longer times based on the quality of the initial plan and the time it takes to respond to comments. Once the chapter has prepared the plan and had all mentors and leads review the plan, they should submit it for approval.

Step	Instructions
	The chapter should prepare the Implementation Pre-Trip Plan using the template and upload it to the “Files” section. The chapter should complete the PSP and upload it to the “Files” section. The owner of the page should then change the statuses of Implementation Pre-Trip Plan and PSP to Draft and click submit for approval. Once the plan has been submitted the ICP Reviewers will be assigned and given 2 weeks to review. The ICP Reviewers will be responsible for the overall technical component reviews, and the PE will focus their review on the non-technical components. They will upload their comments and the PE will approve the comments. At this time the chapter will be notified that comments are available. The chapter should prepare responses to comments either in the text field on the review record or as a document that can be attached to the notes and attachments section of the review record. The ICP Reviewers and PE will review the comments and approve of the changes the chapter has proposed. The PE may schedule a conference call with the team (including REIC/mentor team and faculty advisor) and ICP Reviewers to discuss review comments and allow time for questions. At this time, the Draft Implementation Pre-Trip Plan will be approved by the PE. The chapter should continue with the Final Implementation Pre-Trip Plan.

Step	Instructions
FINAL Implementation: Pre-Trip Plan Instructions Review Criteria Return to Implementation Summary	**Final Implementation** The purpose of the Final Implementation Phase is to present the 100% design of the project and the details of the proposed implementation in sufficient detail. The review process for the Final Implementation Pre-Trip Plan includes review by the Program Engineer as well as external ICP Reviewers. This is the second round of two reviews to receive implementation technical approval.
Implementation: Post-Trip Report Instructions Review Criteria Return to Implementation Summary	The purpose of the Implementation Post-Trip Report is to archive, present, and summarize the completed implementation work on the trip. The Implementation Post-Trip Report Template can be used for implementation and continued implementation trips. The submitted report will include as built drawings, updated O&M reports, notes, photographs, sketches, survey information, interview notes, measurements and any other pertinent data. The template has more detailed instructions on what should be included. The completed report will be uploaded to Volunteer Village in the same location as the Implementation Pre-Trip Plan. The PE will review the plan and may add the ICP Reviewers to provide them information on the results and to solicit any comments. The process for submitting the plan for approval is further described here.

Step	Instructions
Continued Implementation Pre-Trip Plan Instructions Return to Review Criteria Return to Implementation Summary	The purpose of the Continued Implementation Phase is to provide a simpler review process for chapters that want to travel to continue uncompleted or phased work that was approved under a previous Implementation Pre-Trip Plan. Some changes to the original plan can be proposed but they must be deemed minor by the Program Engineer. The Continued Implementation Pre-Trip Plan Template is different than the Implementation Pre-Trip Plan Template. The chapter should only use the Continued Implementation Pre-Trip Plan if the full scope of work planned for the trip has been previously approved by an implementation plan review. The Program Engineer will be able to tell a chapter if a new implementation review is necessary. Small deviations from the original plan are permissible. The typical review time for Continued Implementation Pre-Trip Plan is similar to Assessment and Monitoring & Evaluation Pre-Trip Plans (8 weeks) **Continued Implementation Pre-Trip Plan Instructions in Volunteer Village** The chapter should create a new trip with the proposed travel dates. On the trip record they can create a new technical plan/report and select continued implementation from the list. The process for submitting the trip for approval is covered here**.** The pre-trip requirement section will list the recommended deadline for submitting the plan by. The chapter should upload the completed plan and the PSP to the notes and attachments section and change the status of each in the pre-trip requirements section. The owner of the page should submit the plan for approval. The PE will review the plan to determine if the changes are significant enough to warrant an ICP review. The PE may assign ICP Reviewers. The PE may schedule a conference call with the team (including REIC/mentor team and faculty advisor) and ICP Reviewers to discuss review comments and allow time for questions. PE will approve when requirements have been satisfied, or reject submittal if requirements are not met.

Step	Instructions
Continued Implementation Post-Trip Report Instructions Return to Review Criteria Return to Implementation Summary	The purpose of the Implementation Post-Trip Report is to archive, present, and summarize the completed implementation work on the trip. The Implementation Post-Trip Report can be used for implementation and continued implementation trips. The submitted report will include as built drawings, updated O&M reports, notes, photographs, sketches, survey information, interview notes, measurements and any other pertinent data. The template has more detailed instructions on what should be included. The completed report will be uploaded to Volunteer Village in the same location as the Implementation Pre-Trip Plan. The Program Engineer will review the plan and may add the ICP Reviewers to provide them information on the results and to solicit any comments. The process for submitting the plan for approval is further described here.

<table>
<tr><th>Step</th><th>Instructions</th></tr>
<tr><td>Monitoring & Evaluation:
Pre-Trip Plan Instructions

Review Criteria

Return to Monitoring & Evaluation Summary</td><td>Monitoring & Evaluation: Pre-Trip Plan Instructions

The purpose of the Monitoring and Evaluation Phase is to gather evaluation information to track the progress of the projects against the planned activities and to measure the progress made in achieving partnership objectives and the overall goal. The Monitoring and Evaluation Pre-Trip Plan Template is used to document the planned activities during the trip. A chapter must travel for a minimum of one Monitoring & Evaluation Trip at least one year after implementation is complete. A chapter may not close out a project without conducting Monitoring & Evaluation.

Instructions for submitting the plan in Volunteer Village
The chapter begins the process by selecting tentative dates for the Monitoring & Evaluation trip and creating a new trip record. The process is described in more detail here. These dates will change depending on the time it takes for review. The pre-trip requirements section on the new Implementation Pre-Trip Plan record lists the recommended submission deadlines for the plan. These are suggested timelines based on the average time it takes a chapter to move through the review process. Many chapters experience shorter or longer times based on the quality of the initial plan and the time it takes to respond to comments.

The chapter should prepare the plan using the Monitoring and Evaluation Pre-Trip Plan Template and upload it to the notes and attachments section.

The chapter should upload the completed plan to the notes and attachments section and change the statuses of each requirement in the Pre-Trip requirements section to complete.

The owner of the page should submit the plan for approval.

The PE will review the plan to determine if the report meets the review criteria.

The PE may schedule a conference call with the team (including REIC/mentor team and faculty advisor) and ICP Reviewers to discuss review comments and allow time for questions.

PE will approve when requirements have been satisfied, or reject submittal if requirements are not met.

If the chapter is interested in completing the partnership after the Monitoring & Evaluation trip, they should review the closure instructions here and prepare a draft of the Completion Agreement.

Instructions for completing the Monitoring and Evaluation Plan
The Template has detailed instruction for completing the report.</td></tr>
</table>

Step	Instructions
Monitoring & Evaluation: Post-Trip Report Instructions Review Criteria Return to Monitoring & Evaluation Summary	**Monitoring & Evaluation: Post Trip Report Instructions** The purpose of the Monitoring and Evaluation Post-Trip Report is to document the evaluation gathered during the trip. The Monitoring and Evaluation Post-Trip Template is used to document the work. **Instructions for submitting the report in Volunteer Village** The report should be submitted in Volunteer Village about 8 weeks after travel in the same location as the pre-trip plan. The chapter should prepare the plan using the Monitoring and Evaluation Post-Trip Template and upload it to the notes and attachments section. Once the plan is uploaded the chapter should change the statuses of each requirement in the Post-Trip requirements section to complete. The owner of the page should submit the plan for approval. The PE will review the plan to determine if the report meets the review criteria. The PE may schedule a conference call with the team (including REIC/mentor team and faculty advisor) and ICP Reviewers to discuss review comments and allow time for questions. PE will approve when requirements have been satisfied, or reject submittal if requirements are not met. If the chapter is interested in completing the partnership they should review the Closure Instructions here and prepare a draft of the completion agreement. **Instructions for completing the Monitoring and Evaluation Post-Trip Report Template** The Template contains detailed instructions for completing the Template.

Step	Instructions
Partnership Completion / Cancellation: Instructions Review Criteria Return to Partnership Closure/Cancellation Summary	It is the responsibility of the Responsible Engineer in Charge (REIC) and the chapter team to ensure that the project and Partnership are closed in a responsible manner. EWB-USA projects are closed when the commitments to the community have been met, and the community has demonstrated their capacity to take over the project and the long-term operations and maintenance. Any completed projects within the partnership must be monitored at least one-year after implementation is complete, prior to moving toward closing. Occasionally, a chapter will cancel an existing project due to specific issues such as lack of local partner support, the need has been met by local government, or safety and security issues. A chapter would cancel the project if there is no intention of trying to partner the community with another chapter to continue the program. If the community would like to try to partner with another chapter for their program (if the current chapter can no longer support the program due to travel restrictions by the University, as an example), they should follow the instructions for a Project Transfer. If you are uncertain about whether your project and partnership should be canceled, closed, or transferred, please contact your assigned Program Engineer (PE) for guidance. Here are the steps to take to close out or cancel a partnership and project in Volunteer Village.
Program Transfer: Instructions Review Criteria Return to Partnership Closure/Cancellation Summary	Occasionally, a chapter that is currently partnered with a community is unable to continue the partnership. The most common example is a student chapter that can no longer travel to the country due to their University's restrictions. If the community would still like to continue with a partnership with another EWB-USA chapter, the initial chapter may transfer the project to either another identified chapter or to the EWB-USA Unassigned Project list in Volunteer Village. The chapter is responsible for asking the community partner if they would like to be transferred to another chapter, and for documenting any changes to the community's needs since their initial application for partnership. This information should be provided to EWB-USA so that they can update this for the next chapter. In addition, the chapter is responsible for conveying, in writing, to the community that EWB-USA cannot guarantee that it will be adopted by another chapter and/or it may take a long time. Here are the steps to take to transfer a project in Volunteer Village.

REVIEW CRITERIA

The following tables contain the Review Criteria for each approval process.

Stage	Review Criteria
Chapter Eligibility: Review Criteria Instructions Return to Community Program Adoption	The review criteria for eligibility to adopt a new project only applies to existing chapters that are looking to add a new project Chapters will be evaluated on whether they are in conformance with the overall mission and vision of EWB-USA. This will be assessed by evaluating the chapter against the chapter eligibility criteria.

Team Application:
Review Criteria
 	
Instructions
 	
Return to Community Program Adoption
	Review Criteria
	The Team Application will be reviewed based on their eligibility, fundraising plan, membership capacity, quality management plan, Mentor Team and Responsible Engineer in Charge (REIC) qualifications.
	
	Language Skills and Communication Plan
	• Does the proposed team have the necessary language skills? If not, do they plan to hire (and pay for) translators?
	• Is the proposed communication plan with the community appropriate and feasible?
	
	Status and Quality of Existing Projects (primarily reviewed during chapter eligibility process)
	• Progress is being made on an annual basis in the form of trips or significant advancement in the design. *(In the case of health and safety/security concerns or university travel restrictions, performance will be evaluated on a case-by-case basis).*
	• The chapter is up-to-date with reporting requirements for all projects
	• The chapter is regularly visiting their community partner and communicating with the community when they are not in-country.
	• The chapter has a team of professional mentors committed to the project.
	• The project requires an average amount of time of EWB-USA HQ staff over the life of the project from initial assessment through final implementation.
	• The project(s) implemented by the chapter are to a high engineering standard.
	• The project(s) implemented by the chapter are being maintained by the community.
	
	Volunteer and Chapter Capacity
	• Does the chapter have enough dedicated members to support the partnership?
	    ○ At a minimum, it will be expected that each project, existing and proposed, have at least 10 active members on each project team and an adequate team of professional mentors. Active members include those who have assigned responsibilities, regularly attend meetings, have an active EWB-USA membership, and have an account in Volunteer Village.
	• If a Student chapter, does it have a strong relationship with local Professional Chapter?
	
	Fundraising Capacity + Strength and Quality of Fundraising Plan for New Project
	• Chapters must demonstrate that their membership base and fundraising capacity exceeds the demands of their current projects.
	    ○ At a minimum, a chapter will have to show that none of their existing projects are experiencing significant delays (greater than 1 year) due to fundraising challenges. The chapter will also need to present their plan for funding an additional project without taking needed funding away from their existing project.
	• What are the available funds in their account against number of existing projects?
	• Proven history of fundraising?
	• Do they have a detailed, well-thought out plan for the new project?

<table>
<tr><th>Stage</th><th>Review Criteria</th></tr>
<tr><td></td><td>

Have they considered grants or corporate donations for the new project?
Does the applicant demonstrate the ability to fundraise for the new project?
Do their anticipated fundraising amounts match the rough cost of the project?

Quality Management Plan

Does their plan include NGO and CBO input and review?
Does their plan include REIC and Faculty Advisor review?
Are the time frames given for reviews reasonable?
Does the plan provide a methodology showing at what stages the documents will be reviewed?

Chapter Contacts Complete + Current Membership + Volunteer Village Profile

At a minimum the chapter should list the REIC, Travel Mentor, Project Lead, International Development Lead, Chapter President, Faculty Advisor (for student chapters), Education Lead, PMEL Lead, Health and Safety Officers (x2).

Are all required contacts for this project listed on the application (Contact section at the bottom of application in Volunteer Village)?
Does each contact have an updated Chapter Contact Detail?
Does each contact have an updated Contact/Profile?
Does each contact have an “active” membership (found on the Contact/Profile record)?

Mentor Team Qualifications and Depth

Does the proposed team have a qualified REIC?
Does the proposed team have qualified design, construction and international development mentors?
Does the proposed team have a qualified Travel Mentor?
Did the REIC and mentor team (design, construction, international development, travel) upload resume to VV Contact/Profile record?

</td></tr>
</table>

Stage	Review Criteria
New Partnership in Existing Program: Review Criteria Instructions Return to Community Program Adoption	**Review Criteria** 1. Does it meet the requirements to be included in the existing program? • Neighboring community within a day's drive from initial community • Same municipality • Same NGO 2. If so, the Application will be evaluated in the same way as the Community Program Application. The Chapter will then apply to adopt the new partnership. This will be reviewed based on the same criteria as a Team Application.
New Project: Review Criteria Instructions Return to Community Program Adoption	**Review Criteria** The new project will be reviewed based on a combination of the community's request and qualifications of the chapter, Mentor Team and Responsible Engineer in Charge (REIC). In this review the PMEL data and category will also be evaluated in the Project Review process. Upload REIC resume to REIC's Volunteer profile **Project Information** • Is the Latitude & Longitude provided and in the correct district/region? **Beneficiaries** • Are the Beneficiaries Verified and has the team documented the calculation method? • Does the Design life seem reasonable for the project type? **Project Details** • Are the details including the scope, background, and problem statement clear and accurate? • Is it clear that the chapter has begun communicating with the NGO and community for further clarification about the project? **Project Team** • Is the REIC qualified for the project type? • Did the REIC complete the statement of intent? • Are sufficient members identified in key roles? **NGO Partner** • Is the NGO partner information complete?

<table>
<tr><th>Stage</th><th>Review Criteria</th></tr>
<tr><td>Assessment: Pre-Trip Review Criteria

Instructions

Return to Assessment Summary

Return to Implementation Summary

Return to Monitoring and Evaluation Summary</td><td>Pre-Trip Review Criteria
• Is there an approved technical plan associated with the trip?
• Did team complete all required Pre-Trip Tasks and mark them as complete in VV?
• Did team complete Trip Security section?
• Will travel be through a High-Risk area, and if yes, did team complete High-Risk Travel Trip Task?
• Did team complete Trip Contacts?
• Did team complete Transportation Details section?
    ○ Review details to ensure EWB-USA members are not driving and that overall transportation details are feasible, there are no gaps in transportation plans, and enough information is provided.
    ○ Directions to local hospital?

After adding all of the pre-trip details, final review and approval will take place with the Program Manager / Travel Coordinator. This includes a review of any High-Risk Travel Tasks and verification of travel team information and waivers.</td></tr>
<tr><td>Assessment: Pre-Trip Detail Review Criteria

Instructions

Return to Assessment Summary</td><td>Assessment Pre-Trip Review Criteria
• The planned assessment activities further the goals of the project.
• The trip has appropriate mentorship.
• Was it clear that the chapter’s mentors had reviewed the plan?
• Did team upload complete (and correct) template?
• Is the “project” record approved?
• Review Technical Plan for appropriateness of proposed tasks (may refer to Site Assessment checklist)
    ○ Technical components
    ○ Community development components
    ○ Educational components
    ○ Sustainability components
    ○ Enough information for Alternative Analysis
• Did team attend the required presentations prior to first assessment trip?
• Has chapter contacted country office, if applicable?
• Review REIC/Travel Mentor qualifications on VV profile.
• Is the REIC technical certification included on the record in VV?
• Did team upload a budget? Are the budget numbers included in the budget summary section?</td></tr>
</table>

Stage	Review Criteria

Assessment Post-Trip Report: Review Criteria
 	
Instructions
 	
Return to Assessment Summary
	Assessment Post-Trip Report Review Criteria
	• Did team upload complete (and correct) template?
	• Review report for appropriateness of completed tasks
	    o Technical components
	    o Community development components
	    o Educational components
	    o Sustainability components
	• Did team determine a go/no-go and documentation to support?
	• Does the project appear to be community-driven?
	• Does chapter have a communication plan that includes direct contact with the CBO?
	• Does the reporting align with the overall mission and vision of EWB-USA?
	• Did team include appropriate design information in their reporting, such as water quality testing results, mapping information, supply and demand information?
	• Did team explain their proposed next steps - additional assessment or alternatives analysis?
	• Did they update Project information?
	• Does PE need to have a conference call with team?
	• If the chapter has carried out sufficient assessment activities to proceed with design or whether additional assessments are needed.
	• If the project is likely to be a viable project for EWB-USA and complies with the Principles of Development.
	• Did team complete all required Post-Trip Tasks?
	• Did team upload a final trip budget?
	• Did team complete any lessons learned?
	• Did team complete Incident Report, if applicable?

Alternatives Analysis: Review Criteria
 	
Instructions
 	
Return to Implementation Summary
	Alternatives Analysis Report Review Criteria
	• Did team upload complete (and correct) template?
	• Review report
	    o Does the Alternatives Analysis document the thought process that the chapter went through to determine with the community which alternative solutions are best to address the identified community needs?
	    o Does the report clearly identify the community's identified need, or problem statement?
	    o Do the reviewed alternatives include appropriate design solutions?
	    o Does the analysis include the overall construction costs as well as long-term operation and maintenance costs for each?
	    o Does the analysis document the community's input for preference on proposed alternatives?
	    o Does the documentation include documentation of the REIC's review and input prior to submittal to EWB-USA?
	    o Did the team develop a matrix to compare alternatives appropriately?
	    o Does PE agree with the selected alternative(s)? If not, document why.
	    o Do ICP Reviewers agree with the selected alternatives?

<table>
<tr><th>Stage</th><th>Review Criteria</th></tr>
<tr><td>DRAFT and Final Implementation: Pre-Trip Plan Review Criteria

Instructions

Return to Implementation Summary</td><td>Draft Implementation Pre-Trip Plan Review Criteria
Did team upload the completed technical plan template?
Did the team upload the completed Draft Project Safety Plan (PSP)?
Is the overall submittal at a 90% stage for Draft and 100% for Final?
Did the team follow the appropriate EWB-USA design checklist?
Did the team have the REIC/mentor team review the plan and provide input prior to submitting?
Will the proposed implementation details work within the capacity of the local community?
Did the team appropriately address Operations and Maintenance? Did they use the O&M Checklist? Did they provide a standalone O&M Manual? Is the manual in the local language?
Did the team include other appropriate educational tasks or capacity building tasks?
Is the overall construction schedule reasonable?
Is the quality of the design up to USA standards, and would a PE sign and seal?
Did the team address sustainability for the project? Are all materials available locally? No materials from the US can be brought.
If there is any electrical work, is a professional doing it (and not students)?
What is status of Implementation Agreement? It should be signed at this point.
Is the community contributing the 5% of the capital construction costs, and how?
If the project includes a contractor, did the team provide input on the contractor agreement and attach bids received?
Review REIC/Travel Mentor qualifications on VV profile
Is the REIC technical certification included on the record in VV?
Did team upload a budget? Are the budget numbers included in the budget summary section?
Final Implementation Pre-Trip Plan Review Criteria

The chapter should upload the Final Implementation Pre-Trip Plan and Project Safety Plan (PSP) to the same location as the draft. If changes have been made to any other documents they should be uploaded as well.

The owner should change the pre-trip statuses to final and click submit for approval.

The PE will notify all ICP Reviewers of the uploaded documents and have them review the plan to see that their changes have been adequately addressed.

The PE and ICP Reviewers will provide any additional comments or give their approval to move to construction.

Once the chapter has received final approval, they can purchase airfare, use project funds, and begin preparing the trip details.</td></tr>
</table>

Stage	Review Criteria

Implementation: Post-Trip Report Review Criteria
 	
Instructions
 	
Return to Implementation Summary
	Implementation Post-Trip Technical Report Review Criteria
	• Did team upload a complete (and correct) template?
	• Review report for appropriateness of completed tasks:
	    o Technical components
	    o Community development components
	    o Educational components
	    o Sustainability components
	• Does the project appear to be community-driven?
	• Was O&M addressed appropriately? Did team attach a copy of the final O&M Plan? Is the manual in the local language?
	• What were the deviations from the approved design and the actual implementation? If changes were significant, did team include calculations supporting the design changes, and the REIC's approval of the changes?
	• Did the team include a complete set of record drawings/as-builts?
	• Does the reporting align with the overall mission and vision of EWB-USA?
	• Did team explain their proposed next steps - Continued Implementation Phase, new phase in project, new project, or move to Monitoring & Evaluation Phase?
	• Was the Project Record updated?
	• Did team complete all required Post-Trip Tasks?
	• Did team upload a final trip budget?
	• Did team complete any Lessons Learned?
	• Did team complete Incident Report, if applicable? Marin will officially review, but PE should also review incident.
	• Did team upload the signed Project Partnership Agreement?

Monitoring & Evaluation: Pre-Trip Plan Review Criteria
 	
Instructions
 	
Return to Monitoring & Evaluation Summary
	Monitoring and Evaluation Pre-Trip Technical Plan Review Criteria
	
	• Did team upload a complete (and correct) template?
	• Did the team complete and upload the Project Safety Plan?
	• Review Technical Plan for appropriateness of proposed tasks:
	    o Technical components - technical issues with system?
	    o Community development components - community capacity?
	    o Educational components - address O&M? Other education activities?
	    o Sustainability components - is system being maintained and operated?
	• Does team's monitoring plans align with their selected monitoring indicators?
	• Did the team clarify next steps? If this is the last trip, is completion agreement signed and attached?
	• Is the chapter prepared to monitor PMEL indicators?
	• Review REIC/Travel Mentor qualifications on VV profile.
	• Is the REIC technical certification included on the record in VV?
	• Did team upload a budget? Are the budget numbers included in the budget summary section?

<table>
<tr><th>Stage</th><th>Review Criteria</th></tr>
<tr><td>Monitoring & Evaluation: Post-Trip Report Review Criteria

Instructions

Return to Monitoring & Evaluation Summary</td><td>Monitoring and Evaluation Post-Trip Report Review Criteria

Did team upload completed (and correct) template?
Review report for appropriateness of completed tasks:

Technical components
Community development components
Educational components
Sustainability components

Did team accomplish all of the planned tasks?
Does the project appear to be community-owned?
Does the reporting align with the overall mission and vision of EWB-USA? Any red flags?
Did team include appropriate monitoring and evaluation information, including a documentation of operation and maintenance?
Did team explain their proposed next steps - additional M&E or project closeout?
Community Agreement – Acknowledgement of Completion, with Signatures - Necessary if this will be last Monitoring and Evaluation trip and the chapter intends to close out the project following this trip.
Did team complete all required Post-Trip Tasks?
Did team upload a final trip budget?
Did team complete any lessons learned?
Did team complete all PMEL requirements?

PMEL Guidance

Did team complete Incident Report, if applicable? Marin will officially review, but PE should also review incident.
Did team upload the signed Project Partnership Agreement?
</td></tr>
</table>

<table>
<tr><th>Stage</th><th>Review Criteria</th></tr>
<tr><td>Partnership Closure / Cancellation / Transfer:
Review Criteria

Return to Instructions

Return to Partnership Closure/Cancellation Summary</td><td>Partnership/Project Closure or Cancellation Review Criteria
Completion
Overall snapshot - what happened?
Did they implement any projects, and did they monitor all completed projects at least one-year after completion?
Did they complete final monitoring and evaluation and report?
Have the needs of the community been met?
Does the community demonstrate that they are able to successfully take ownership of the project?
Community Agreement – Acknowledgement of Completion and/or record of attempts (dates/times, email, phone calls documenting their attempts) by Chapter to communicate with community the program closeout.
Cancellation
If the chapter is cancelling the project, PE should determine if:
The community still has identified engineering needs and would like to continue to partner with another EWB-USA chapter
The community has demonstrated their commitment to the project and partnership to continue with a new partnering chapter
The project should be transferred to Unassigned instead of Cancelled.
Transfer
If partnership should be transferred, work with chapter to get it transferred, either to another chapter or to the Unassigned Project list in Volunteer Village.
Has the chapter notified the community that the project may not be adopted again or that it may take a long time?</td></tr>
</table>

Version History

Version	Description	Reviewer	Date
1.0	Initial Release of Document	ICP	12/13/2017
1.1	Update for 3/15/18 VV Update	ICP	3/15/2018
1.2	Update for 4/17/18 VV Waiver Update	ICP	4/17/2018
1.3	Update for 2/14/19 PMEL Update	ICP	2/14/2019
1.4	Update for 4/22/20 VV Update	ICP	4/22/2020
1.5	Update for 6/18/25 Project Safety Plan	ICP	6/18/25
1.6	Update for 6/20/25 Broken Links	ICP	6/20/25