

SANREM CRSP

**SUSTAINABLE AGRICULTURE AND
NATURAL RESOURCES MANAGEMENT
COLLABORATIVE RESEARCH SUPPORT PROGRAM**



POLICY AND OPERATING PROCEDURES MANUAL

May 2008

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Program Structure and Mode of Operation

The Sustainable Agriculture and Natural Resources Management Collaborative Research Support Program (SANREM CRSP) is an initiative of USAID. Its main purpose is to foster Sustainable Agriculture (SA) and Natural Resource Management (NRM) through collaborative research between U.S. and developing country institutions for their mutual benefit by improving their abilities to develop and implement socially, economically, and environmentally sound agricultural production and NRM practices. The objective of the SANREM CRSP is to support SA & NRM decision-makers in developing countries by providing access to appropriate data, information, tools and methods of analysis, and by enhancing their capacity to make better decisions and thereby improve livelihoods and the sustainability of natural resources. The SANREM CRSP strives to develop and implement a replicable approach to SA and NRM that will help: 1) enhance stakeholder livelihoods; 2) promote sustainable agriculture and natural resource management systems; 3) increase the involvement of women in SA and NRM decision making; and 4) foster biodiversity.

In working towards these goals the SANREM CRSP has six specific objectives:

- Promote and develop SA and NRM policies and practices that alleviate poverty and minimize land use conflicts by:
 - improving agricultural productivity,
 - reclaiming degraded lands,
 - protecting the environment,
 - conserving soil and water quality, and
 - enhancing community capabilities to manage natural resources.
- Identify and describe the technical factors affecting SA and NRM.
- Identify and describe the social, economic, political, and institutional factors affecting SA and NRM.
- Work with participating groups to design, test, and evaluate appropriate participatory SA and NRM strategies.
- Work with participating groups to promote training and information exchange on Participatory SA and NRM.
- Work with participating groups to foster policy and institutional changes that promote SA and NRM.
- Disseminate SA and NRM knowledge by constructing and maintaining an on-line SA and NRM knowledge base.

SANREM priority areas of inquiry include:

- **Technology Integration:** Technologies needed by stakeholders and decision-makers to promote SA&NRM practices (i.e., biotechnology, GIS, decision support tools, etc.).
- **Governance:** Policies and institutional arrangements enabling civil society to better manage natural resources.
- **Economic Policy and Enterprise Development:** Supporting sustainable SA & NRM practices that develop niche markets, and are eco-friendly and competitive.
- **Social and Institutional Capacity Building:** Training and policies promoting improved SA & NRM leadership, NGO technology transfer, and increased civil society and government synergy.

- **Biodiversity Conservation and Environmental Services:** Investigating synergistic relationships between production, biodiversity, and livelihoods.
- **Systems Linkages:** The integrated SANREM CRSP systems approach demonstrates how linkages between gender, biophysical, technology, governance, economic, social, environmental, and globalization factors achieve sustainable development.
- **Globalization, Vulnerability, and Risk:** SA & NRM best practices to manage globalization and address risk and vulnerability caused by HIV/AIDS, food insecurity, etc.

Purpose and Authority of the Policy and Operating Procedures

The purpose of the Policy and Operating Procedures is to ensure that the SANREM CRSP operates in a consistent and efficient manner to promote SA & NRM research, training and technology transfer.

Authority for Policy and Operating Procedures for the SANREM CRSP is contained in the Leader-with-Associate Cooperative Agreement No. EPP-A-00-04-00013-00 from USAID EGAT/NRM/LRM to the Management Entity in the Office of International Research, Education, and Development (OIRE), Virginia Polytechnic Institute and State University (Virginia Tech). The cooperative agreement contains the Schedule, Program Description, Standard Provisions, Sample Associate Awards, and Program Administration and Implementation provisions. This Cooperative Agreement extends the authority for the SANREM CRSP from 30 September 2004 to 30 September 2009.

In case of discrepancies between the Policy and Operating Procedures and the Cooperative Agreement, the Cooperative Agreement document described in paragraph 2 above takes precedence.

The October 2006 SANREM CRSP POP Manual replaces the previously approved September 2005 SANREM CRSP POP Manual.

SANREM CRSP Organizational Structure

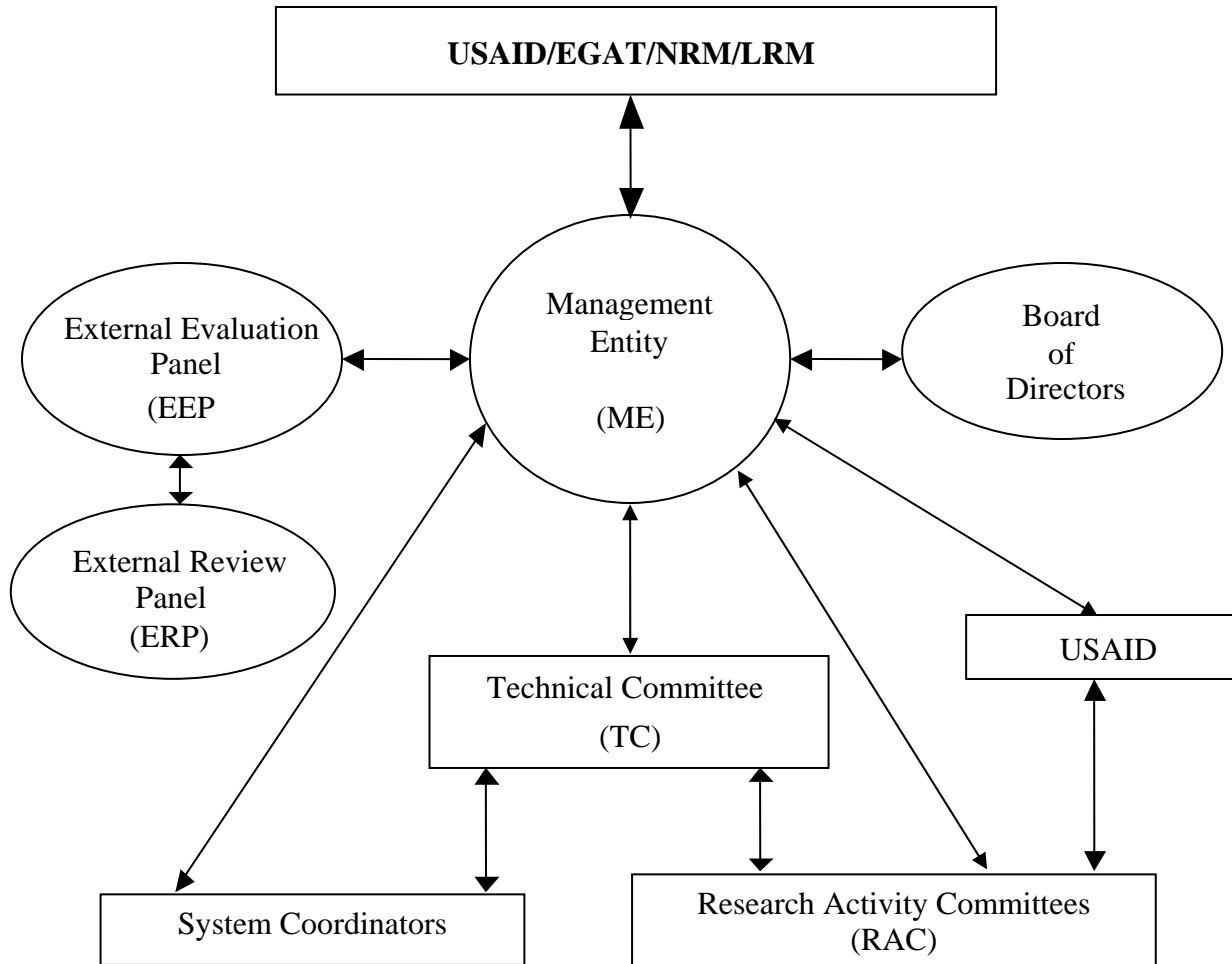
The Office of International Research, Education, and Development (OIREED) at Virginia Polytechnic Institute and State University (Virginia Tech) is the Management Entity (ME) for the SANREM CRSP and is the primary grantee of USAID. The ME is accountable to USAID for the SANREM CRSP programmatically and fiscally.

Certain programmatic and fiscal responsibilities are delegated from the ME to participating U.S. and host country institutions through sub-awards for research projects conducted by individual U.S. scientists and their host country counterparts. The current participating and charter member US institutions are Virginia Tech (VT), University of Colorado (UC), Iowa State University (ISU), North Carolina State University (NCSTU), Purdue University, Rodale Institute, Washington State University (WSU), and Winrock International Institute for Agricultural Development, with VT as the Management Entity (ME) institution. Collaborating institutions include: North Carolina A&T University, The World Vegetable Center (AVRDC); CGIAR Challenge Program on Water and Food (CPWF), International Center for Research in Agroforestry (ICRAF), International Crops research Institute for Semi Arid Tropics (ICRISAT), International Institute for Tropical Agriculture (IITA), International Livestock Research Institute (ILRI), International Rice Research Institute (IRRI), and the World Cocoa Foundation (WCF). Institutional partners may be added and/or withdrawn as the program evolves.

Collaborative research arrangements between participating U.S. and host country institutions are governed by Memoranda of Understanding (MOU) between the host country and the SANREM CRSP. The MOU creates the official environment in which U.S. co-PIs can initiate and carry out collaborative research in a host country. This augments the capability of the host country institutions to collaborate with the overall SANREM CRSP. The MOU also creates the official environment under which "Host Country Activities" are identified and implemented.

The Board of Directors of the SANREM CRSP serves as the top policy-making body for the CRSP. The Technical Committee (TC), the Research Activity Committees (RAC), External Evaluation Panel (EEP) and the USAID Cognizant Technical Officer (CTO) of the SANREM CRSP, and the USAID Economic Growth, Agriculture and Trade/Natural Resource Management/Land Resource Management (EGAT/NRM/LRM) Team advise the ME and the Board in areas of policy, technical and program management, collaborating host country coordination, budget management, and review.

MANAGEMENT AND ADVISORY BODY STRUCTURE



Management Entity and its Advisory Groups

Management Entity (ME)

Office of International Research, Education, and Development (OIRE)

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Board of Directors

Alton Thompson, Chair	North Carolina A&T
Charles Reafsynder	Indiana University
Robert Bates	Washington State University
James Lowenberg-DeBoer	Purdue University
Thomas Payne	University of Missouri
Alice Pell	Cornell University
Sharron Quisenberry	Virginia Tech
Mark Rosegrant	IARC Representative
Harry Rea (Ex-Officio Voting)	SANREM CRSP, USAID CTO
S.K. De Datta (Ex-Officio)	SANREM CRSP, Administrative PI
Theo Dillaha (Ex-Officio)	SANREM CRSP, Program Director
Keith M. Moore (Ex-Officio)	SANREM CRSP, Associate Program Director

Technical Committee (TC)

Jeff Alwang	Long-term Research PI	Virginia Tech
Elizabeth Jiménez Zamora	Host country representative	Universidad de La Cordillera
Maria Elisa Christie	Gender Equity Coordinator	Virginia Tech
Elinor Ostrom	Long-term Research PI	Indiana University
Manuel Reyes	Long-term Research PI	North Carolina A&T Univ.
Gerald Shively	Governance Systems Coordinator	Purdue University
Alex Travis	Long-term Research PI	Cornell University
Corinne Valdivia	Long-term Research PI	University of Missouri
Harry Rea (Ex-Officio)	CTO SANREM CRSP	USAID
S.K. De Datta (Ex-Officio)	Administrative PI SANREM CRSP	Virginia Tech
Theo Dillaha (Ex-Officio)	Program Director SANREM CRSP	Virginia Tech
Keith Moore (Ex-Officio)	Assoc. Prog. Dir. SANREM CRSP	Virginia Tech
Mike Bertelsen (Ex-Officio)	Policy/Econ. Coord. SANREM CRSP	Virginia Tech

External Evaluation Panel

Ron Cantrell, Chair	
Edwin C. Price	Texas A&M University
Kathleen Galvin	Colorado State University
Paul L.G. Vlek	University of Bonn

MANAGEMENT ENTITY

1. Purpose

The Management Entity (ME) is an institution with the legal status of judicial body that administers the Cooperative Agreement from USAID and manages the SANREM CRSP and its activities, including collaborative research, education and outreach programs.

2. Staff

The Administrative Principal Investigator is the overall leader of the SANREM CRSP and ensures financial and institutional accountability in accordance with standard university procedures and USAID requirements. Virginia Tech employs a full-time Program Director and Associate Program Director for overall program leadership, part-time Gender Equity and Policy and Economic Impact Assessment Coordinators, and other salaried support staff deemed necessary for overall implementation of the CRSP. Through acceptance of this Cooperative Agreement, the Management Entity University (Virginia Tech) agrees to provide other programmatic and fiscal backup to the CRSP.

3. Administrative Principal Investigator Responsibilities

- Provide administrative and financial oversight of the SANREM CRSP, monitoring conformance with university and USAID procedures;
- supervise the core management team; and
- serve as a scientific resource for the program, including non-voting ex-officio membership on the TC and Board.

4. Program Director Responsibilities

- Manage technical, administrative, and budgetary matters regarding the CRSP;
- coordinate the efforts of the core management team;
- lead and coordinate preparation of the annual work-plan and budget;
- report program accomplishments and expenditures to USAID through annual reports and other required reports;
- represent the SANREM CRSP in CRSP Council meetings;
- develop and implement monitoring and evaluation procedures to assure that the overall performance of the CRSP meets program objectives;
- monitor programs and use of funds by participating institutions that are assigned responsibility through sub-awards;
- liaise with consortium partners and external SANREM CRSP collaborators;
- facilitate equipment purchase approval through the CTO and the USAID Contracts Office;
- provide leadership in seeking and negotiating supplemental financial resources, such as Associate Awards with USAID Missions;
- coordinate rapid deployment of technical assistance requested by USAID Missions;

- participate as a non-voting ex-officio member of the Board and TC;
- implement Board policies and recommendations; and
- represent the CRSP to USAID/Washington and internationally.

5. Associate Program Director Responsibilities

- coordinate implementation of the SANREM Knowledge Base
- edit the SANREM Landscape Systems book
- manage the impacts reporting system (TOPS)
- coordinate collection and preparation of semi-annual and annual reports
- technically edit the annual report
- facilitate degree and non-degree training programs
- oversee production of SANREM newsletters, fact sheets, research briefs, and technical bulletins
- maintain records on all training, workshops, CRSP publications
- coordinate Memoranda of Understanding with host country institutions
- contribute updates to the SANREM CRSP website
- represent the Program Director as needed at CRSP Council and other meetings
- update and maintain the *SANREM CRSP Policy and Procedures Manual*

6. Gender Equity Coordinator Responsibilities

- Ensure that gender equity is an integral planning, implementation and impact component of all SANREM projects;
- provide input on gender implications of all SANREM CRSP interventions;
- participate in all ME planning processes and activities;
- participate as a voting member of the TC; and
- ensure that gender considerations are properly integrated into all research and training activities, and that a high level of gender scholarship is maintained in SANREM development and technology transfer.

7. Policy and Economic Impact Assessment Coordinator Responsibilities

- Coordinate policy and economic impact assessments and the reporting of related policy and economic information.

Board of Directors

1. Purpose

The Board of Directors (BOD) will provide policy-level advice to the ME in conformance with the CRSP Guidelines. The Board helps the ME guide the CRSP.

2. Composition

The SANREM Board will be composed of eight high-level administrators of eligible US colleges and universities (see CRSP Guidelines, February 2005), host country institutions, and the International Centers serving on a rotating basis; the USAID CTO; and non-voting ex officio members of the ME. Members of the Board are selected by the ME in concert with the CTO. The USAID CTO will serve as an ex officio, voting member of the Board. VA Tech Management, as the ME, has permanent membership on the BOD. The Virginia Tech Board member will not have an official position in the ME.

A majority of the US-based funded lead-institutions will be represented on the board in a given year. Representation of these institutions will rotate according to the plan developed by the Board. The term of service will be either two or three years, to ensure continuity. Individual service time will be determined by consensus of the full Board.

The Board of Directors will elect a Chair every two years, with duties beginning September 30. The incumbent may be re-elected. The ME serves as the executive secretariat to the Board.

3. Responsibilities

The Board of Directors is responsible for overall policy concerning programs and operations for the SANREM CRSP. The responsibilities of the BOD include, but are not limited to:

- Providing the ME with advice on program policy issues;
- Evaluating the global plan, content and balance of the program;
- Reviewing the progress/accomplishments of the CRSP through annual reports and mid-term reviews by the EEP;
- Approving additions/deletions/modifications to activities of the CRSP; and
- Approving nominations for the EEP to be submitted to USAID/W.

4. Meetings

The Board will meet at least once annually. The ME, in consultation with the Chair of the Board, determines the date and location of the meetings. Meeting options include conference telephone calls or other electronic communication. Participation by at least 50 percent of the BOD members is considered a quorum for transaction of business and a simple majority of members present is required for decisions by the BOD. The meeting

agenda will be developed jointly by the ME and the Board Chair and sent to members along with supporting material one week in advance of the meeting. Board meeting minutes will be distributed and edited within two weeks following the meeting. They will be acted upon at the following meeting.

5. Action without Meeting

Meetings may be held through telephone conference. Any action required or permitted to be taken by the Board may be taken by a mail/e-mail ballot without a congregate meeting if members of the Board, individually or collectively, consent in writing to such a procedure. Actions duly taken without a congregate meeting will be recorded and will have the same force and effect as an action or resolution duly adopted at a meeting of the Board.

6. Fees and Compensation

Members of the Board shall not receive compensation for services as Board members, but reimbursement of travel expenses for attending board meetings is allowed.

7. Extent of Authority of Board of Directors

While the ME has the authority to make the final decisions relative to program assignments, budget allocations and authorization, the ME should, in the collaborative spirit, carefully consider the advice and guidance of the Board and other CRSP advisory groups. Departure from the Board's recommendations by the ME should be justified, recorded and reported in writing to the Board by the ME.

Conflict of Interest Policy

The Conflict of Interest policy is designed to prevent apparent and obvious conflicts of interest. Members of the EEP and ERP shall not be affiliated with current SANREM partner institutions. Members of the EEP and ERP shall not participate in evaluating (scoring and voting) an application if:

- they are a PI or collaborator on an application,
- their institution has a stake in the application (lead or sub-contract),
- they have co-authored a publication or been a Co-PI on a project during the past five years with a PI on an application,
- they were the major professor of an application PI, or
- they feel they cannot objectively evaluate the application for any other reason.

Members of the EEP and ERP with clear or potential conflicts of interest, shall notify the SANREM CRSP Program Director immediately so that these conflicts can be avoided through reassignment of reviews or replacement of EEP and ERP members.

Technical Committee

1. Purpose

The purpose of the Technical Committee (TC) is to review the research, training, and technology transfer progress; to assess the research outcomes and impacts of the SANREM CRSP; and to propose modifications in the program.

2. Composition

The voting members of the SANREM CRSP Technical Committee (TC) will be comprised of:

- Research Activity Leaders,
- SANREM CRSP Gender Equity Coordinator,
- USAID CTO,
- Host Country Representative,
- IARC representative,
- Private sector, NGO, or U.S. Federal Agency representative; and
- Other external members as needed to provide additional scientific or development expertise.

Terms on the TC will be for two years, with a possibility of renewal.

Non-voting, ex-officio TC members include:

- SANREM CRSP Administrative Principal Investigator,
- SANREM CRSP Program Director,
- SANREM CRSP Associate Program Director, and
- SANREM CRSP Coordinator for Policy and Economic Impact Assessment.

The TC Chair will be elected by a simple majority by TC members for a one-year term beginning with the initial meeting. The TC Chair may be re-elected. Elections may be conducted via email or at scheduled TC meetings.

3. Responsibilities

The TC provides the ME with technical advice concerning the scientific merit and development implications of program activities. The responsibilities of the TC include, but are not limited to:

- reviewing technical progress relative to annual work plans and proposing modifications therein;
- reviewing LTR research activity reports, annual activity work plans, and progress reports and presentations at the annual meeting;
- providing input into coordination of U.S. and host county programs;

- providing input and assisting the ME in preparing for EEP reviews;
- responding to EEP suggestions and concerns;
- providing programmatic guidance to the Research Activity Committees;
- monitoring the development of the SANREM knowledge base; and
- facilitating workshops, symposia, site workshops and other meetings promoting SANREM program objectives.

4. Meetings

The TC will meet physically once a year – usually in conjunction with the SANREM CRSP annual meeting. Telephone conference calls or electronic conferencing will be held as needed to conduct additional committee business. The ME will provide travel support for the Host Country, IARC, and the private sector/NGO/Federal Agency representatives to attend the annual meeting.

The ME, in consultation with the Chair of the TC, determines the time, format, and location of meetings. Participation by at least 50 percent of the TC voting members is considered a quorum for transaction of business and a simple majority of voting members present is required for decisions by the TC. The Chair has a vote on all issues. TC meeting minutes will be distributed within two weeks after the meeting and acted upon at the following meeting.

5. Action without Meeting

Any action required or permitted to be taken by the TC may be taken by a mail/email ballot without a meeting, if a majority of the voting members of the TC consent in writing to such a procedure. Actions duly taken without a congregated meeting shall be recorded and shall have the same force and effect as an action or resolution duly adopted at a meeting of the TC.

6. Fees and Compensation

Members of the TC shall not receive compensation for services as TC members, but reimbursement for expenses of attendance at each meeting is allowed.

7. Extent of TC Authority

The TC recommendations will be reported in writing to the ME (typically via TC meeting minutes) and the ME will report to the TC on management follow-up actions. TC policy recommendations will be forwarded to the Board of Directors for further consideration.

Landscape Systems Coordinators

1. Background

The SANREM CRSP is organized around landscape systems and their interactions. The fundamental thesis of SANREM III is that sustainable improvements in stakeholder livelihood, the environment, and environmental services are only possible through a holistic systems approach to development that considers interactions across the different landscape systems. These systems are differentiated by the type of decision maker and the challenges and opportunities they face. The extent to which decision makers and their challenges and opportunities are different has very important implications for many aspects of SA/NRM including the appropriate types of technologies and practices and optimal technology transfer strategies. The five landscape systems addressed by the SANREM CRSP include:

- *Field/production unit-based systems,*
- *Farm/enterprise-based systems,*
- *Watershed-based systems,*
- *Ecological systems, and*
- *Governance and policy systems.*

During the first two years of the project, base funding is provided for Landscape Systems Coordinators (LSC). At the end of two years, when the SANREM long-term research activities have been established, the landscape systems approach and the effectiveness of the landscape system activities will be reviewed to determine if they should continue.

2. Purpose

The primary purpose of the LSC is to develop the SANREM knowledge base in their system area, coordinate planning and other activities for their respective system, and to facilitate cross-system planning and activities.

3. Composition

- Field/production unit-based systems, Paul Mueller, NCSU;
- Farm/enterprise-based systems, Chris Pannkuk, WSU;
- Watershed-based systems, Saied Mostaghimi, VT;
- Ecological systems, Andrew Manu, ISU; and
- Governance and policy systems, Gerald Shively, Purdue.

3. Responsibilities

- Serve on the TC;
- Develop the SANREM knowledge base in their landscape system area;
- Coordinate planning and other activities for their respective landscape system;
- Facilitate cross-system planning and activities;
- Assist SANREM proposal developers in developing competitive proposals that address SANREM landscape system and cross-system priorities; and

- Assist the ME in identifying opportunities to contribute to USAID mission goals and opportunities for Associate Awards.

4. Extent of Landscape System Coordinator Authority

As appropriate, the LSC recommendations are reported in writing to the ME and the TC.

Research Activity Committees (RACs)

1. Purpose

The primary purpose of Research Activity Committees (RACs) is to plan and implement SANREM CRSP-funded long-term research activities.

2. Composition

RACs are composed of Co-PI teams from U.S., international, and host country institutions who have successfully competed for and won SANREM CRSP long-term research activity funding. Each RAC will elect a Research Activity Leader (RAL), who shall always be from the lead U.S. university and a Site Coordinator from each host country. Research Activity Leaders will hold a seat of the Technical Committee.

3. Responsibilities

- Coordinate collaborative research and institution building for respective SANREM CRSP long-term research activities;
- coordinate research and budgetary issues with the ME;
- develop annual work plans and budgets for their SANREM CRSP-funded long-term research activity and recommend the same to the ME;
- provide host country and regional training need recommendations to the ME with special emphasis on host country student identification for training;
- provide input to collaborative activity in the geographical regions covered and contribute to the SANREM CRSP regionalization and globalization goal;
- provide input and assist the ME and the PAC in planning and implementing program, country and regional reviews;
- coordinate RAC activities with the TC and ME;
- assist the ME in developing and implementing cross-program activities and knowledge exchange; and
- support the development of the SANREM Knowledge Base by adding activity generated knowledge to the Knowledge Base.

4. Meetings

The RACs shall meet at least once annually. Such meetings are generally held at an appropriate site in a host country involved in the project. The RAL and Site Coordinator in consultation with other RAC members will determine the time, location, and meeting agenda. Such meetings will be scheduled in a cost effective way so that as many members as possible will attend. RAC meeting minutes will be distributed within one month to the ME and RAC members. The participation of 60% of the RAC members shall constitute a quorum for the transaction of business. A majority vote of members present is required for actions to be approved. The RAL has a vote on all issues.

5. Action without Meeting

Any action required or permitted to be taken by the RAC may be taken by a mail/email ballot without a meeting, if members of the RAC individually or collectively, consent in writing to such procedure. Actions duly taken without a congregate meeting shall be recorded and shall have the same force and effect as an action or resolution duly adopted at a meeting of the RAC.

6. Fees and Compensation

Members of the RAC shall not receive stated compensation for services as RAC members, but reimbursement for expenses of attendance at each meeting is allowed if budgeted through project activity funds.

7. Extent of RAC Authority

RAC recommendations are reported in writing to the ME and the TC, and to the Board of Directors for further consideration, if appropriate.

Research Activity Leaders (RALs)

1. Purpose

The Research Activity Leaders (RALs) provide leadership to their respective Research Activity Committees (RACs) coordinating the development and implementation of annual Work Plans and reporting progress of the RAC research activity. The RALs should establish and maintain good working relationships with all partner institutions in the US and host countries, International Research Centers, USAID Missions, U.S. and host country scientists, students, other CRSPs, and organizations (NGOs, donors, etc.).

2. Selection of Research Activity Leaders

Each RAC will elect a Research Activity Leader, who shall always be a PI from the lead U.S. university.

3. Responsibilities

- Serve as a voting member of the SANREM CRSP Technical Committee
- Provide overall coordination and leadership of RAC activities.
- Work closely with the RAC and Site Coordinators on all research activity issues.
- Keep all collaborating institutions informed of major events or developments in the activity.
- Participate actively in the administration of the research activity budget and maintenance of appropriate records.
- Ensure that activity expense vouchers are submitted to the contracting SANREM CRSP university or the Management Entity at Virginia Tech on a monthly basis.
- Act as the point person for information concerning RAC activities.
- Coordinate the writing, consolidation, and submission of all appropriate reports to the SANREM CRSP ME, making sure that all deadlines are met.
- Ensure that equipment purchased with program funds are received and assigned properly.
- Coordinate agendas and logistics for SANREM CRSP collaborators, evaluators, and other partners.
- In close collaboration with the RAC, lead in the preparation of SANREM CRSP annual work plans and reports.

Site Coordinators

1. Purpose

The Site Coordinator, with the assistance of the RAL and the members of the RAC, provides leadership in overall coordination of the CRSP activities in a host country. The Site Coordinator is responsible for day to day on-site activities and shall ensure the implementation of the SANREM CRSP activities in the country or region as detailed in the annually adjusted Activity Work Plan. The Site Coordinator should establish and maintain good working relationships with host country research institutions, International Research Centers, USAID Missions, U.S. and host country scientists, students, other CRSPs, and organizations (NGOs, donors, etc.) is among the main duties of the Site Coordinator.

2. Selection of Site Coordinators

Once long-term research activities are established, RACs will select Site Coordinators to coordinate in country activities. Site Coordinators need to be endorsed by the collaborating host country institution.

3. Responsibilities

- Provide overall coordination and in-country leadership of all SANREM CRSP activities at the site.
- Work closely with the RAL and RAC on all program issues.
- Keep all collaborating institutions informed of major events or developments in the activity.
- In cooperation with the coordinating host country institution, participate actively in the administration of the site budget and maintenance of appropriate records.
- Facilitate and actively ensure that activity expense vouchers are submitted to the contracting SANREM CRSP university or the Management Entity at Virginia Tech on a monthly basis.
- Ensure that activity fund advances and expense reimbursements by the SANREM CRSP are received properly and regularly.
- Act as the point person for information coming into the country and information going out of the country concerning the site's activities.
- Coordinate the writing, consolidation, and submission of all appropriate reports to the RAL and the SANREM CRSP ME, making sure that all deadlines are met.
- Serve as liaison with the USAID Mission as well as other appropriate organizations/institutions interested in SANREM related issues in the country.
- Ensure that equipment purchased with program funds are received and assigned properly.
- Coordinate agendas and logistics for SANREM CRSP collaborators, evaluators, and other visitors to the site.
- In close collaboration with the RAL, coordinate the preparation of SANREM CRSP annual work plans and reports.

External Evaluation Panel

1. Purpose

The External Evaluation Panel (EEP) is charged with overall technical guidance and evaluation of the SANREM CRSP, which includes evaluations of proposals submitted through the SANREM CRSP competitive awards program, program direction, and research collaboration with host countries. The EEP will conduct an annual evaluation of the SANREM CRSP that includes a review of individual research activities and the overall program. The EEP provides written evaluations and recommendations for retention, addition, elimination, and/or modification of SANREM CRSP component projects.

2. Composition

The EEP shall consist of 3 to 5 members representing a diverse mix of SA & NRM disciplines and not representing any currently participating institutions. There will normally be four EEP members, however, membership may be expanded or contracted depending on EEP work load. The term of office is for two or three years with terms staggered to promote continuity. Members may be reappointed. The EEP Chair will be selected by the EEP members and the ME, in consultation with the Board.

3. Appointment

Candidates for membership on the EEP are nominated by the ME, in consultation with CRSP partners, the Board of Directors and the TC. The ME evaluates the nomination list and then recommends names and alternate names through the CTO to USAID for approval. After receiving approval from USAID the ME makes the appointments of the EEP members.

4. Responsibilities

- Evaluate, rank, and recommend cutting edge research activity applications for long-term support to the ME;
- assure that the SANREM CRSP achieves programmatic objectives and effective geographic and disciplinary balance;
- identify and promote complementarities and synergies between and within research activities;
- assess the balance of domestic versus overseas research in terms of their effectiveness of solving constraints in developing countries;
- evaluate the cost-effectiveness of the entire CRSP operation in terms of actual cost of doing business versus cost of alternatives;
- evaluate the degree of success realized in the transfer of the results of research to users;
- identify inadequate, irrelevant, or marginal activities to the SANREM CRSP objectives;

- report evaluation findings and recommendations to the ME, Board, and USAID; and
- conduct other timely evaluations which may be on-going or in-depth evaluations, with overseas and U.S. site visits being made as required.

5. Meetings

The EEP will meet annually and as necessary to plan for activities and develop recommendations. The ME, in consultation with collaborating institutions and the EEP, will develop a working schedule for comprehensive reviews by the EEP. The reports of the EEP are submitted to the ME, who in turn provides copies to USAID and the appropriate committees and the Board.

6. Fees and Compensation

Members of the EEP will be compensated for services as EEP members and for travel expenses. The formula for daily compensation will be yearly salary divided by 260, multiplied by the number of days served, adjustable up to 10%, with a ceiling of a GS 15 Grade 10.

7. Extent of EEP Authority

The CRSP should make full use of the EEP and its recommendations. The ME will respond in writing to EEP reports clarifying acceptance or rejection of each recommendation and report. The EEP recommendations may serve as the basis for bringing about salutary changes in the CRSP. In the event the ME disagrees with the EEP's recommendations, the rationale for such disagreement shall be recorded by the ME and forwarded to USAID.

External Review Panel

1. Purpose

The External Review Panel (ERP) provides additional disciplinary diversity and technical expertise to support the EEP in its review and evaluation of proposals and projects in the SANREM CRSP competitive awards program.

2. Composition

The ERP shall consist of temporary members representing a diverse mix of SA & NRM disciplines and not representing any currently participating institutions. Panel members shall be drawn from the U.S. and the international community. ERP members will be designated on an as needed basis. Membership may vary and may grow substantially during periods when large numbers of proposals must be reviewed and evaluated. The term of office is for the period of the review and/or evaluation and will be completed when a written review and/or evaluation is submitted. Members may be reappointed.

3. Appointment

Candidates for membership on the ERP are nominated by the ME, in consultation with EEP and the Board of Directors. The ME evaluates the nomination list and then recommends names and alternate names through the CTO to USAID for approval. After receiving approval from USAID the ME makes the appointments of the ERP members.

4. Responsibilities

- Evaluate, rank, and recommend proposed research activities;
- Assist in the evaluation of on-going research activities as needed; and
- Report findings and recommendations to the EEP, ME, and the Board.

5. Meetings

The EEP Chair will preside over any meetings of the ERP. The ERP will meet as necessary to review proposals or projects and develop recommendations. The ME, in consultation with collaborating institutions and the EEP, will develop a working schedule for comprehensive reviews. The reports of the ERP members are submitted to the ME, who in turn will provide copies to the EEP and the Board.

6. Fees and Compensation

Members of the ERP will be compensated for services as ERP members and for travel expenses. The formula for daily compensation will be yearly salary divided by 260, multiplied by the number of days served, adjustable up to 10%, with a ceiling of a GS 15 Grade 10.

7. Extent of ERP Authority

The EEP and ME will utilize the recommendations of the ERP in assessments of SANREM program activities. The EEP and ME should carefully consider the advice and guidance of the ERP. Any departure from the ERP recommendations should be justified and recorded.

Operating Procedures

Procedures for Enacting Organization Changes

During the lifetime of the CRSP and during the period of an award, program priorities may cause substantial changes in the research program, such as adding or deleting a research activity or U.S. institution, change in host countries or geographic region, or making major changes in the objectives of a project. The SANREM CRSP will utilize its normal planning and review process, including input from the Board, the TC, the Site Coordinators, the EEP, the ME and the USAID CTO, and in accordance with the CRSP Guidelines, when adding, deleting, moving or substituting a project, activity, institution or Co-PI.

These Policy and Operating Procedures have been developed to help the SANREM CRSP operate in a transparent, consistent, and efficient manner. They may be changed at any time based on suggestions from any component of the SANREM CRSP and subject to approval by the Board and the ME. The POP Manual will be updated once a year to reflect these changes.

Procedure to Initiate New Research Activities

In the broadest sense, research activities include the sub-activities of training, research, and technology transfer. New research activities may be created on an as-needed basis through guidance from the advisory bodies. To initiate a new activity, the ME will prepare a Request for Applications (RFA) for the activity area. Request for Applications may be for actual research activities or for the planning grants to develop long-term research applications. New activities should complement the SANREM CRSP global plan. Request for Applications are disseminated to all U.S. institutions through NASULGC and the Community of Science, posted on the website, and emailed to the mailing list of SANREM CRSP interested individuals and institutions. When Research Applications are received by the ME, they are forwarded to the EEP (and ERP if applicable) for evaluation and ranking. The ME in full consultation with the EEP then selects applications for funding.

Change in Research Activities

Approval is needed from the ME and the Board whenever there is a major change in the approved project objectives, research plan or budget. Reason for this action may include:

- changes in country, regional, or global priorities;
- performance of the project below an acceptable standard; and
- decreased funding from USAID, which requires elimination or significant reductions in research activities.

Change in Co-Principal Investigators

When a Co-PI's (partners and collaborating institution representatives) role with a activity is completed or a Co-PI leaves a partner institution because of transfer or any other reason, the

project will remain with the institution for the remainder of the budget year, subject to the institution submitting an interim plan of work to the ME for approval. The project then reverts back to the ME for consideration of reallocation of funds.

New Co-PIs can join the SANREM CRSP only through consultation with the ME and the appropriate Research Activity Leader. Sub-awards under the CRSP are with institutions, not individuals.

Change in Institutions

Participating U.S. institutions are competitively selected on the basis of the quality of research applications submitted by scientists affiliated with that institution. A participating institution may be designated as the Lead Institution of an activity that involves multiple collaborating institutions. The Lead Institution becomes the responsible institution to enter into a sub-award agreement with the institution of the ME and to provide required reports (technical, administrative, and fiscal) as indicated in the agreement. The institutional support, expertise and capacity in specific areas of science and their ability to conduct collaborative research in support of approved objectives are also evaluated in the selection process. Each participating U.S. institution is responsible for implementing activities that contribute to the overall goals and objectives of the SANREM CRSP.

From time to time it may be necessary to change the institutional leadership of research activities. A participating U.S. or host country institution may be phased out or placed on inactive status because of:

- Completion of research activity objectives;
- change in status of co-principal investigator(s);
- changes in country, regional or global priorities;
- the institution no longer has the resources to maintain its participation;
- performance of the institution is below an acceptable standard; and
- decreased USAID support for the CRSP, which requires elimination of project activities to remain viable.

The process of replacing a lead or participating U.S. institution involves the ME, EEP, and Board acting in accordance with the established review procedures. The Board and ME work with an institutional representative (IR) of the affected institution to bring about the appropriate action and the ME works with the USAID CTO throughout the process.

In the event that a U.S. or host country institution have their activities closed out, the PIs and Board Members from that institution will lose their seat and voting privileges on those advisory bodies. Such institutions would be free to submit new research applications at any time to further their participation in the SANREM CRSP.

Multi-institutional Involvement

Recognizing that effective collaborative research requires multi-institutional involvement (among SANREM CRSP partners), the ME, through the TC, shall ensure all programs involve multiple US institutions in their host country activities in a proactive way.

Carry Over Funds Policy:

When unexpended funds from the previous year's budget exceed 10 percent of the year's allocation, the excess will be de-obligated from the current year's research activity budget and re-obligated to new activities by the ME. Exceptions may be made if they are requested in writing 30 days before the end of the previous budget year and approved by the ME.

Fund Terminology

- Core Funds:** Core funds are funds coming directly from the USAID EGAT Bureau for SANREM CRSP activities.
- Associate Award Funds:** Associate award funds are those funds coming from USAID Missions directly to the ME for activity implementation. These funds are used for specific tasks to be carried out as determined by the USAID mission.
- Technical Assistance Funds:** Technical assistance funds are core funds specifically designated for the performance of specific tasks requested by USAID Missions.
- Carry Over Funds:** Carry over funds are those funds allocated, but for which no invoices have been submitted to the ME during previous budgetary year(s).
- Pipeline:** Pipeline describes the funds remaining after subtracting expenditures which have been invoiced to date from the total amount awarded to date. These core funds are committed to work plan-driven activities. They may have been expended or encumbered by Virginia Tech or any of the collaborating institutions, but since they have not been paid, USAID considers them pipeline funds.

SANREM CRSP Five-Year Calendar

The Five Year Calendar (October 2004 to September 2009) establishes the series of events that require planning through Phase III of the SANREM CRSP award. This provides a planning time frame for all committees, groups and reviews of the program.

SANREM CRSP FIVE YEAR CALENDAR

	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009
October	1 - ME Established, Project Begins 18 – Bridging Award RFAs Issued	Annual Report	Board Meeting Annual Report	Annual Report	Annual Report
November	23 – Bridging Award Applications Due 24 - Bridging Award Applications Distributed to TC for Ranking	EEP Meets to evaluate Long-term Core Research Applications			Annual EEP Program and Activity Review
December	6 –Partners Meeting 7 – Technical Committee (TC) Meeting 10 – Bridging Grant Recipients Notified 21 – Issue	Long-term Core Research Projects Awarded			
January	Quarterly Progress Report RFA for Planning Awards Issued RFA for Long-Term Research Awards Issued	Quarterly Progress Report Long-Term Research Activities Initiated	Quarterly Progress Report	Annual EEP Program and Activity Review	RFAs Issued for FY 2010 to 2015 Program Activities
February	Planning Grant Proposals Due EEP Meeting, Review Planning Grant Applications Planning Awards Awarded			Board Meeting	Draft 5-year extension document
March	Planning Award Applications Due				
April	Quarterly Progress Report	Quarterly Progress Report Annual Research Program and TC Meeting	Quarterly Progress Report	Semi-Annual Progress Report	Semi-Annual Progress Report
May			Annual EEP Program and Activity Review	Annual Research Program and TC Meeting	Annual Research Program and TC Meeting
June			Annual Research Program and TC Meeting		Submit 5-year extension document
July	Quarterly Progress Report	Quarterly Progress Report	Quarterly Progress Report		
August	Board Meeting	Annual Work Plan Submitted	Annual Work Plan Submitted	Annual Work Plan Submitted	
September	LTR Applications due				SANREM 2005-2009 Report

Coordination and Clearance of International Travel

Travel Request

International travel associated with SANREM CRSP activities must be in the annual work plan approved by USAID before a trip can be taken. Any additional international travel must be approved by the ME and USAID on a case-by-case basis. For international travel to be approved, travel expenses must be provided for in the annual activity work plan and budget and individual trips to each country visited submitted to the ME on the International Travel Authorization Table (https://secure.hosting.vt.edu/www.oired.vt.edu/sanremcrsp/team_PI/sanrempi.php). The ME will submit a request for travel authorization and the annual activity budget to USAID for approval. Once USAID has approved the travel, the ME will issue International Travel Authorization Numbers to each Subaward Lead-PI or Research Activity Leader.

Subaward Lead-PIs and Research Activity Leaders are responsible for assigning these individual/trip authorizations among Co-PIs. Please note that the authorizations are assigned by country visited, not number of round trips. For example, if a Co-PI travels to Ecuador and Peru on the same round trip, there will be two authorization numbers associated with the travel. The authorized destination country is not adjustable. However, the PI has some flexibility in adjusting who actually travels for the assigned tasks and on what dates the trip(s) is taken.

These International Travel Authorization Numbers should be submitted with the documentation accompanying invoices for the associated travel. International travel will not be reimbursed without these authorization numbers.

International Travel Guidelines

PIs and their researcher colleagues must follow their own institutions rules and regulations for both domestic and international travel. However, there are some USAID-specific guidelines that also need to be taken into account.

The term "international travel" means travel to all countries other than those within the home country of the traveler. All international air travel and shipments under this award are required to be made on U.S. flag air carriers to the extent service by such carriers is available. For more information on these regulations see the 'Fly America Act' website at: <http://www.tvlon.com/resources/FlyAct.html>. For up-to-date information on international per diem rates, see: <http://www.state.gov/m/a/als/prdm>. Click on the appropriate year in the column on the left.

TraiNet Reporting

USAID requires that **all foreign** participants who are traveling on USAID funds (either partially or completely) be registered and apply for entry visas through USAID's **TraiNet System** in order to comply with Homeland Security regulations. All participating US lead institutions must be able to utilize TraiNet to obtain visas for

foreign research activity participants. For instructions about how to comply with this system see [SANREM CRSP Form 10](#).

Trip Reports

Within 15 days following the completion of each international trip, the traveler must submit a trip report to the ME summarizing the accomplishments of the trip. If several individuals are traveling together to one site, a single report representing the group will suffice. The report shall include the purpose of the trip, participants, activities, technical observations, progress in meeting purpose of the trip, suggestions and recommendations for follow-up, if appropriate, and a list of contact persons with their title and organization affiliation. After review, these reports will be posted by the ME on the SANREM CRSP web site: <http://www.oired.vt.edu/sanremcrsp/>.

The SANREM CRSP required form for "International Travel Request" follows.

PROCEDURES FOR EQUIPMENT PURCHASE

To purchase equipment meeting the following requirements on CRSP project or host country project funds, in compliance with the Office of Management and Budget's Circular A-21, the ME must obtain USAID CTO approval. Under normal circumstances, this approval should be acquired through the annual work plan and budget approval process.

1. Purchase of Special Purpose Equipment, which is defined as an article of nonexpendable tangible personal property, which is used only for research, medical, scientific, or other technical activities, and which has a useful life of more than two years and an acquisition cost of **\$5,000 or more** per unit.
2. Purchase of General Purpose Equipment, which is defined as an article of nonexpendable tangible personal property, the use of which is not limited only to research, medical, scientific, or other activities (e.g., office equipment and furnishings, air conditioning equipment, reproduction and other equipment, motor vehicles, and automatic data processing equipment), having a useful life of more than two years and an acquisition cost of **\$5000 or more** per unit.

For equipment purchase the "SANREM CRSP Equipment Authorization and Request to Purchase" form must be completed. Equipment requests need the rationale which identifies:

- a. Reason the item is needed---relating to stated project objectives
- b. Ownership and responsibility for maintenance, liability and operation costs-- whether U.S. or HC, CRSP or collaborating institution expenses
- c. Availability of budgeted funds for purchase, shipping, etc.

If the proposed purchase has a non-U.S. source and/or origin, a justification for waiver will be completed on the reverse side of the Equipment Authorization form. This is a very lengthy process which must be absolutely necessary.

One copy of the completed form should be sent to the ME where it will be reviewed by the ME and the Director to confirm that the item requested supports research on identified project objectives and has been budgeted.

USAID/W approval for purchase (when required) will be transmitted in writing to the ME, who will forward copies to the Co-PI and designated Contracts and Grants Officer.

The ME will not process equipment purchase authorization requests for items already purchased. Without USAID/W approval for purchase, equipment costs will be disallowed by Federal auditors. These costs will then be borne by the U.S. lead institution or that entity or individual responsible for authorizing the purchase.

All equipment purchased with USAID SANREM funds and used in host countries must be labeled and branded in accordance with USAID Branding guidelines. See: <http://www.usaid.gov/branding/>.

(A copy of the "Equipment Authorization and Request to Purchase" form follows):

SANREM CRSP
EQUIPMENT AUTHORIZATION AND REQUEST TO PURCHASE¹

To: Management Entity (540) 231-1230
CTO, SANREM CRSP

Date: _____
Award No. EPP-A-00-04-00013-00

From: Co-PI: _____

Institution _____

_____ Item is Special Purpose. Can be used only for research activities (i.e. microscopes, and other laboratory equipment). **Prior written approval by USAID/W contract office is required when the unit cost exceeds \$5,000.**

_____ Item is General Purpose. Can be used for other than research use (equipment and furnishings, reproduction and printing equipment, motor vehicles and automatic data processing equipment) **Prior written approval by USAID/W contract office is required when the unit cost exceeds \$5,000.**

_____ Is this equipment **US source and origin**? Yes ___ No ___

_____ Item requires source and /or origin waiver if source (vendor) and/or origin (manufacturer) are other than U. S. Complete the justification for waiver on the next page.
Item(s) to be purchased _____

Quantity _____ Unit Price (U.S. \$): _____ Total Price: _____

Equipment will be used in what location: _____

Person(s) responsible for equipment: _____

Suggested Vendor and **Country of Source/Origin**: _____

Discussion/Justification

Was this equipment approved **in the Work plan**? Yes _____ No _____

Which Work plan Year? 1 _____ 2 _____ 3 _____ 4 _____ 5 _____

Approvals:

SANREM CRSP Program Director _____ Date _____

SANREM CRSP Administrative PI _____ Date _____

SANREM CRSP CTO, USAID _____ Date _____

¹ Note: Use this form for submission of Equipment Authorization Requests until the on-line SANREM Report System is operational. All USAID purchased equipment must be labeled with approved USAID labels. The ME will mail these labels to you when the purchase is approved.

SANREM CRSP
EQUIPMENT AUTHORIZATION AND REQUEST TO PURCHASE
(Page 2)

Source/Origin Waiver:

Justification: (Why must non-U.S. vendor/manufacturer be used? If purchase is made in Host Country, is it an "off-the-shelf" item? Are spare parts and qualified dealers/technicians available for maintenance?)

SANREM CRSP Publications and Presentations

SANREM CRSP Publications/Presentations are one avenue the CRSP uses to help in the transfer of technology. All SANREM CRSP publications and presentations (except those with copyright issues) shall be included in the SANREM Knowledge Base. This includes abstracts, journal articles, books, book chapters and proceedings, dissertations and theses, and miscellaneous publications and presentations made by SANREM CRSP PIs. Publications and presentations, with required meta data shall be submitted to the SANREM Knowledge Base (<http://www.oired.vt.edu/sanremcrsp/SKB.html>) within 30 days of publication/presentation.

Publications and presentations funded by the SANREM CRSP Award should acknowledge USAID support with the following statement.

"This publication/presentation was made possible by the United States Agency for International Development and the generous support of the American People for the Sustainable Agriculture and Natural Resources Management Collaborative Research Support Program under terms of Cooperative Agreement No. EPP-A-00-04-00013-00 to the Office of International Research and Development at Virginia Polytechnic Institute and State University."

SANREM CRSP Newsletter

"SANREM CRSP Update" is the CRSP quarterly newsletter published by the ME. Its purpose is to provide articles of information and interest to our network of collaborators. It includes accomplishments of our U.S. and host country PIs, new publications available, workshops and meetings, and items of special interest. Newsletter articles are requested from the PIs and our collaborators.

In providing materials for the SANREM CRSP Newsletter, please include information on the following items.

1. Tell why this is an important SANREM story—what makes it interesting and exciting?
2. Please provide specific information on:
 - Who – Name of key characters in the story. Who else involved? Who was work done for?
 - Where – Location, why there? In general (like a country), but also a description of the more immediate area and its inhabitants
 - What – What exactly happened? Not just “an assessment” or “research”, but what the assessment or research entailed.
 - When – Dates and the time span in which the story took place? Why it happened then? During what season?

3. The how and why are critical for putting together an interesting article.
Why – Why is this relevant to SA & NRM? Why is it important to share this experience?
How – How was the key feature of your story accomplished?
4. Anecdotes (a story within the story) give an article life—by this we mean: was there an interesting local person who helped out, was where you stayed unique or special, etc.? These anecdotes may be something outside the specific research information, but that provides color to an article. This is a newsletter, so colorful facts can be included
5. If you have pictures, they would be appreciated, please set digital cameras to fine or high resolution.

(A copy of the newsletter submission form is on the next page):

SANREM CRSP Newsletter Submission Form

NAME: _____ EMAIL: _____

TOPIC(s): _____

Note: *New Research Initiatives - Host Country topics - Awards/Appointments - Workshops/Meetings/Presentations - Training/Visiting Scholars - Travel (Destination, purpose, contacts, etc.) - other items of interest.*

Mail to:
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SANREM CRSP/OIRED
526 Prices Fork Road
Virginia Tech
Blacksburg, VA 24061-0378

Phone: (540) 231-1218
FAX: (540) 231-1402
E-mail: destrada@vt.edu

REPORTING REQUIREMENTS

This section outlines the reports required of the CRSP by USAID, indicating who is responsible for producing the report and corresponding deadlines. Semi-annual and Annual Report templates are available at: https://secure.hosting.vt.edu/www.oired.vt.edu/sanremcrsp/team_PI/sanremphi.php

SANREM Knowledgebase Reporting

All SANREM funded participants are required to contribute to the SANREM Knowledge Base (SKB). The SKB is a key component of the SANREM CRSP. It organizes SA and NRM knowledge into a searchable database that enable users to quickly locate information (articles, reports, books, projects, presentations, photos, videos, etc.) using user specified keywords and criteria. All knowledge developed through the SANREM CRSP will be accessible via the SKB at http://www.oired.vt.edu/sanremcrsp/menu_information/knowledgebase.php.

SANREM partners are required to enter reportable material into the SKB as soon as it is generated. Examples of reportable knowledge include, but are not limited to:

- Reports
- Journal articles and other refereed publications
- Extension-type publications
- Miscellaneous articles and publications
- Presentations (PowerPoint and others)
- Training programs and activities
- Videos and other multimedia works
- SANREM related photos

When this knowledge is entered via the SKB, the SANREM partners will also be asked to fill in bibliographic, other metadata, and the activity identification number (via a user-friendly template) so that the knowledge can be properly classified and retrieved in the future. Procedures are available to upload non-copyrighted electronic copies of SANREM generated work to the database.

Semi-annual Reports

The SANREM CRSP requires a semi-annual progress report by April 15. Please be concise, five pages maximum. The format is provided below and as Form 14 at: https://secure.hosting.vt.edu/www.oired.vt.edu/sanremcrsp/team_PI/sanremphi.php

Semi-Annual Reporting Template (Form 14):

- I. Executive Summary of overall progress for the past six months
- II. Research progress by objective.
 1. Progress towards completing critical Annual Work Plan tasks.

2. Changes in research design or methods, obstacles encountered, and actions taken.
3. Significant research findings (bulleted form preferred).

III. Significant training, capacity building, and networking activities

1. Update degree training students supported (complete and attach Form 16).
2. Update short-term training events conducted (complete and attach Form 17).
3. Update publications list with proper bibliographic citations and enter into SKB* (complete and attach Form 18).
4. List any special events or networking activities.

IV. Research strategy and development objectives.

1. Describe progress achieving TOP Framework milestones.
2. Indicate how this contributes to progress along the development impact pathway.
3. Discuss any lessons learned relevant to development goals.

* Semi-annual reports will not be considered complete until all SKB entries are up-to-date.

Annual Research Activity Report

The SANREM CRSP ME and its partners are required by contract to submit a technical progress report to USAID annually. This report describes the past year's activities including technical, scientific, managerial information and associated research products. Please complete all seven sections and associated tables. The SANREM CRSP fiscal year ends on 30 September. Each Principal Investigator is responsible for submitting their technical progress report and associated research products by **October 15** of each year to the ME in collaboration with their US and host country partners.

Annotated Annual Report Template (Form 15):

I. Executive Summary

The annual report should begin with a brief synopsis of scientific accomplishments over the past year specifying their potential developmental impacts. This brief section should summarize research goals, significant research findings and products, development impacts, long and short term training, and development networking resulting from your research team's activities.

II. Research Strategy and Developmental Objectives

Please insert **Form 20** (Research Strategy and Development Objectives) presenting your research goals, strategy, transdisciplinary framework, critical scientific hypotheses or research questions, and the methods to address the development problem identified in your TOP Table analysis. This section should be updated as the project strategy evolves.

III. Research Progress by Objective

This section is the core of the annual report. Please structure it according to the development objectives set out in your TOP Table. **For each objective**, use the following sub-headings to describe your scientific progress and development impacts:

- **Critical Research Accomplishments** (describe key research implementation, outputs, and findings);
- **System Level** (specify the SANREM Landscape system level at which each key finding applies and note any cross-scale linkages/interactions);
- **Development Impact** (describe the extent of progress along the development pathway identified in the TOP Table); and
- **Challenges and Responses** (realistically note the extent to which the project timeline is being met, any obstacles encountered, and the actions taken or proposed to respond to obstacles).

IV. Degree and Non-Degree Training Activities

Please complete/update the Degree and Non-Degree Training Tables (**Forms 16 and 17**). Add rows for additional entries as needed. Long-term tracking of CRSP training impacts requires full information on each student. Non-Degree or short-term training programs include workshops, seminars, field days, short-courses, etc. These tables will be consolidated with those of other LTRAs.

Please insert here a paragraph summarizing the total number of trainees by gender and US (developed country) and host country according to type of training program.

V. Publications, Presentations, and Other SANREM CRSP Products

If you have been routinely entering your research information resources on the SKB, this section of your report (Form 18) will be printed for you by the ME. If you haven't, please do so immediately. All information resources produced by your LTRA should be entered into the SKB by October 15. Please forward an electronic copy or at least two physical copies of all SANREM CRSP produced materials to the ME for archiving and submission to USAID/Washington.

Please insert here a paragraph summarizing the total number of SANREM products by type of information resource.

VI. Networking Activities

Describe research investigator exchanges, contacts made, technical assistance, and participation in information sharing and dissemination events (workshops, seminars, presentations, etc.).

VII. Project Highlights

Each highlight should be a concise bulleted statement describing a critical finding, result or impact of your research (not more than two or three lines of text). The quality of the bulleted highlights is extremely important. Please take the time to: (1) identify a substantial output/result and its impact(s); and (2) clearly and precisely describe its significance.

In addition, please submit: **Form 16** – Degree Training Table,
Form 17 – Non-Degree Training Table, and
Form 19 – USAID Common Indicators Table.

These SANREM CRSP Forms can be found at:

https://secure.hosting.vt.edu/www.oired.vt.edu/sanremcrsp/team_PI/sanrempi.php.

Please submit your report in Word or Rich Text format, using Times New Roman in 12-point font and single-spaced. Use only the **Section Headings (I. thru VII.)** from this document (do not include the instructions in your text). All formatting should be kept to a minimum. Text should be flush-left, no paragraph indent, with an empty line between paragraphs. All Annual Report material should be submitted to Keith Moore at: keithm@vt.edu.

Annual Work Plans and Work Plan Budgets

The **Annual Work Plan and Work Plan Budget** is an annual update of the original proposal work plan/scope of work. It takes into account, accomplishments, obstacles, and opportunities identified during the past year. The original project goals and objectives can be modified based on changes proposed via the Annual Work Plan and Work Plan Budget. The Work Plan and Budget list major research objectives, tasks required to accomplish the objectives, responsible parties, expected outcomes/products, and the estimated cost of each objective/task. If approved by the ME, previous objectives can be modified or dropped and new objectives and research activities can be undertaken. Templates for the preparation of work plan budgets are available in the SANREM CRSP Team Room at:

https://secure.hosting.vt.edu/www.oired.vt.edu/sanremcrsp/team_PI/sanrempi.php.

SANREM CRSP Trip Reports

Within 15 days following the completion of each international trip, travelers must submit a trip report to the Lead-PI who then approves and transmits the report to the ME. If several individuals are traveling together, a single report representing the group will suffice. The suggested format is provided below. Please cover accomplishments and critical issues encountered but be concise, you can always add annexes if you feel it necessary. After review, these reports will be posted by the ME on the SANREM CRSP web site: http://www.oired.vt.edu/sanremcrsp/menu_information/trip.php.

Country(s) Visited:

Dates of Travel:

Travelers Names and Affiliations:

Purpose of Trip:

Sites Visited: *(Locations within countries: institutions, cities, villages, or regions)*

Description of Activities/Observations:

Training Activities Conducted (complete Form 17):

Program type (workshop, seminar, field day, short course, etc.)	Date	Audience	Number of Participants		Training Provider (US university, host country institution, etc.)	Training Objective
			Men	Women		

Suggestions, Recommendations, and/or Follow-up Items:

List of Contacts Made:

Name	Title/Organization	Contact Info (address, phone, email)

Research Reports

Data collected using SANREM CRSP funds are considered to be in the public domain and must be released to the public within a reasonable period of time. SANREM CRSP partners may hold data sets for up to two years before release to facilitate publications and scholarly activities, but ultimately all SANREM CRSP generated data must be made available to the public with proper documentation (meta data) so that it can be used by others. Release of data may take one of several forms, all described below. Before data are released, full sharing of all data collected is expected among collaborating individuals and institutions. Data may be released through the SANREM web site, publication in professional journals, through publication as SANREM CRSP technical and annual reports, and ultimately as the raw data with appropriate meta data and processing to correct errors, protect respondent confidentiality, and facilitate use by other researchers

and development specialists. All publications resulting from SANREM CRSP support are expected to show joint authorship of US and host country scientists.

Publication in professional journals is strongly encouraged and is used as an indication of the quality of the research conducted. Publication in journals that allow free web-based access by developing country scientists and professionals is preferred. Thousands of journals now exist in this category. One list of such journals is available at <http://www.doaj.org/>. The order in which authors are listed will be decided among the involved researchers on a case-by-case basis. However, host country collaborating scientists, who have made significant contributions to the reported research, must be included as authors or co-authors of the papers generated from the site research. All collaborators are expected to be involved with data collection, analysis, and preparation of the paper. Acknowledgment of the SANREM CRSP and USAID is required in all publications.

- A series of SANREM CRSP technical reports is anticipated. These reports generally will contain information that is important and is rigorously obtained, but which may not find acceptance in an academic journal. Guidelines for authorship would be the same as for journal articles.
- Research Briefs will be published to disseminate findings, technologies, approaches, and institutional arrangements of significant interest to policy makers, decision makers, development agents, and SA & NRM implementers.
- After publication and/or clearance with the involved researchers, data may be released by the CRSP through various means. These means would include response to specific requests and/or the SKB.
- All spatial and geographic information system activities financed federal funds must comply with:
 1. OMB Circular A-16, Executive Order 12906;
 2. Automated Directives System (ADS) 507 (Freedom of Information Act);
 3. ADS 551 (Data Administration); and
 4. ADS 557 (Public Information).

These regulations essentially require the following:

- document digital spatial data according to Federal Geographic Data Committee (FGDC) Level 1 metadata standards;
- deliver to USAID digital copies of spatial data with accompanying metadata; and
- make spatial data available to the public at the cost of reproduction.

SANREM CRSP Reports and Due Dates

Reports	Due Date
Semi-annual Progress Reports	15-Apr
SANREM generated knowledge and information products	Continuous via web-based SKB
Trip Reports	Within 2 weeks of trip completion
Annual Work Plan and Budget	15-Aug (year 2 and beyond)
Annual Research Activity Report	15-Oct
Annual Training Report	15-Oct (Part of Annual Report)

APPENDICES

APPENDIX I. SANREM CRSP Budget Guidelines

- **Cost Sharing** - U.S. institutions are required to provide a 25 percent matching commitment (see budget notes on SANREM CRSP website for detailed instructions).
- **Indirect Costs for US institutions and CG Centers** - For all applications, indirect costs are limited to the lesser of federally negotiated off-campus research rates or 30 percent of modified total direct costs for U.S. universities, IARCs, and non-host country organizations. No indirect costs are allowed on equipment and student tuition.
- **Indirect Costs on Host Country Sub-awards** – Indirect costs by lead institutions on planning and long-term research sub-awards to host country organizations are prohibited. Indirect costs for host country institutions and organizations are limited to 10 percent.
- **Sub-awards** – The SANREM CRSP sub-award policy is designed to maximize the amount of funding going to host country organizations.

Lead institutions, who waive indirect costs on sub-awards to host country organizations, may administer the host country organization sub-awards and the sub-awards with indirect costs to other participating US partners and IARCs.

If the lead institution is unable to waive host country organization indirect costs, then the ME (OIRE/VT) will manage sub-awards for the host country organizations, US partners, and IARCs for the lead institution. The lead institution is still responsible for managing the programmatic components of the research activity. Virginia Tech will make payments to sub-awardees on receipt of invoices and copy the responsible lead institution PI so that the PI can track expenditures against the approved budget and against program goals and objectives.

This policy will be followed by all participating institutions including Virginia Tech. By avoiding overhead on overhead, SANREM will have more programmatic funding than is possible otherwise.

Budget Terminology

- **Host Countries** - country(ies) worked "in", "for", or "on behalf of".
- **Host Country Expenditure** - funds expended exclusively "in", "for" or "on behalf of" Host Country SANREM CRSP, i.e., host country graduate student stipend, equipment for a host country, salaries for staff or labor working in the host country, etc.

- **Domestic Expenditures** - funds expended "in" the U.S. "for" general SANREM CRSP, i.e., equipment for a U.S. lab, a U.S. graduate student stipend, part of or whole salaries for post-doctorates, secretaries, technicians, etc. working in the U.S.
- **Academic Scientist Staff** - U.S. University faculty in permanent or temporary positions working in the U.S. or an LDC.
- **Other Salaries** - Clerical or any hourly labor, i.e., work-study students or field workers.
- **Supplies** - chemicals, paper, tags, bags, diskettes, film, etc.
- **Equipment** - Computer, microscope, vehicle, incubator, etc.
- **Travel** - If you travel to Guatemala and back then your airfare will go under Guatemala; if you travel to Guatemala and Jamaica on the same trip, then 1/2 your airfare will go under Guatemala and the other half under Jamaica. All travel which is done exclusively in the U.S. will go under U.S.

APPENDIX II. SANREM CRSP Directory

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APPENDIX III. Glossary and List of Acronyms

The SANREM CRSP is administered as a Leader with Associates Award to Virginia Tech, which is the *Management Entity* (ME) that provides program leadership, administers sub-awards to participating institutions, and maintains fiscal responsibility.

The *Administrative Principal Investigator* is the Director of the Office of International Research, Education, and Development (OIRE) at Virginia Tech and is the person ultimately responsible to USAID for technical and fiscal matters.

The *Program Director*, as part of the ME, is responsible for program development, coordinating the activities across the program and overseeing daily operations of the SANREM CRSP.

The *Technical Committee* (TC) provides technical guidance and advice for the program development.

The *Landscape System Coordinators* (LSC) are those PIs responsible for establishing the knowledge base and coordinating activities involved in each of the five landscape systems (field; farm/enterprise; watershed; ecological; and governance/policy).

The *Research Activity Committees* (RAC) are the coordinating body for the research teams implementing long-term research activities lead by a *Research Activity Leader* (RAL), usually the lead Co-PI for the activity.

In the broadest sense, *Research Activities* include the sub-activities of

training, research, and technology transfer.

A *Research Activity Leader* is a PI from the lead U.S. university who has been elected by his Research Activity Committee to provide leadership and representation of the RAC on the TC.

The *Site Coordinators* are host country long-term research activity leaders responsible for coordinating the research activity in the host country.

Principal Investigators are scientists in charge of research for a defined research activity of a CRSP.

The *External Evaluation Panel* (EEP) provides unbiased review and prioritization of activity proposals and objective evaluations of the program and its activities suggesting areas for improvement.

The *Board of Directors* provides policy guidance to the ME.

A *Sub-Award Agreement* is a document representing a sub-agreement made between the ME and a participating institution under authority of a cooperative agreement by the ME with USAID.

A *USAID Mission* is a formally organized USAID unit in a developing country led by a Mission Director, or a Country Representative.

The *Host Countries* are developing countries in which USAID has a presence and SANREM CRSP activities are being conducted.

Host Country Expenditures are funds expended exclusively “in”, “for”, or “on behalf of” SANREM CRSP Host Countries, i.e., host country graduate student tuition and stipend, equipment for a host country, salaries for staff and/or labor working in the host country, etc.

Domestic Expenditures are funds expended “in” the US. “for” general SANREM CRSP activities, i.e., equipment for a US lab, a US graduate student stipend and tuition, part of or whole salaries for secretaries, technicians, etc. working in the US.

ACRONYMS

EGAT - Bureau for Economic Growth, Agriculture and Trade.

AVRDC - Asian Vegetable Research and Development Center

BARC - Bangladesh Agricultural Research Council

BIFAD - Board for International Food and Agricultural Development

BOD - Board of Directors: Normally the senior policy/decision making body of a CRSP.

CARDI - Caribbean Agricultural Research and Development Institute

CARPE - Central African Regional Program for the Environment (<http://carpe.umd.edu/>)

CGIAR - Consultative Group for International Agricultural Research.

CRSP - Collaborative Research Support Program.

CRSP Council - Administrative body consisting of the Program Directors and Chairs of the Boards of Directors and

Technical Committees from each active CRSP.

CTO - Cognizant Technical Officer. A USAID employee designated by the Agreement Officer to oversee a CRSP on behalf of USAID.

EEP - External Evaluation Panel

ERP - External Review Panel

EGAT - Bureau for Economic Growth, Agriculture and Trade.

GEF - Global Environment Facility (<http://www.gefweb.org/>)

GIS - Geographical Information Systems

GMO - Genetically Modified Organisms

IARC - International Agricultural Research Center.

IFPRI - International Food Policy Research Institute

IITA - International Institute of Tropical Agriculture (<http://www.iita.org>)

IRRI - International Rice Research Institute

LRMT - Land Resources Management Team in EGAT/NRM

ME - Management Entity of a CRSP.

MOU – Memorandum of Understanding

MSI – Minority Serving Institutions.

NARS - National Agricultural Research Systems.

NEPAD – New Partnership for Africa’s Development (<http://www.nepad.org/>)

NGO – Non-Governmental Organization

EGAT/NRM - USAID Bureau for Economic Growth, Agriculture and Trade/Office of Natural Resources Management

PA – Participatory Appraisal

PI – Principal Investigators - Scientists in charge of the research for a defined segment or a scientific discipline of a CRSP.

RAC - Research Activity Committee

RAL - Research Activity Leader

SANREM - Sustainable Agriculture and
Natural Resource Management

TC - Technical Committee.

Title XII - The Title XII Amendment to
the International Development
Food Assistance Act of 1975 as
passed by the United States
Congress and subsequently
amended.

TraiNet – USAID on-line system for
tracking training activities for
foreign nationals

(<http://usaidtraining.devis.com/>)

VT – Virginia Polytechnic Institute and
State University (Virginia Tech)

USAID - United States Agency for
International Development

USAID/W - Washington headquarters of
the United States Agency for
International Development.