

Document 525B - Pre-Implementation Report Short Form Instructions for Report Preparation

Please go to the EWB-USA website to make sure that you are using the most current version of this document.

The 525B-Pre-Implementation Report Short Form is to be used by chapters who wish to continue an implementation that has already received approval from the Technical Advisory Committee (TAC). This form is only for use if **no aspect** of your implementation has changed. If your design has been altered or you are adding additional aspects that were not presented to TAC, you should fill out the regular 525- Pre-Implementation Report.

The 525B – Pre-Implementation Report Short Form follows the same submittal deadlines as the 521 – Pre-Assessment Report. Please refer to the submittal deadlines schedule on our website for details.

Formatting: Please ensure correct page numbering in your document, and include a Table of Contents. Also, please minimize the number of documents submitted. Multiple documents are unprofessional and confusing. If multiple documents are submitted, the document name for each must be self-explanatory. The contents of the file must be obvious without opening the file.

Size Limit (10MB): Please limit the size of the reports submitted to the EWB-USA Headquarters (HQ) to a maximum size of 10MB. If you compress the photos within the document, this will help reduce the size of the entire document. If you do not know how to compress photos, please **see our website for instructions**. Please contact projects@ewb-usa.org if you have special circumstances that may require a larger report submittal.

Privacy Notice – Please do not include any personal identifying information in Part 2. Part 1 information is kept confidential within the EWB-USA Headquarters. Part 2 information may be released to other chapters or interested parties.

Report Content - There are two parts to the Pre-Implementation Report Short Form: Part 1 includes the administrative information for the trip and Part 2 includes project information.

Part 1 is a fill-in-the-blank exercise that provides HQ with specific information about chapter and community contacts, travel details, health and safety plans, the Program Impact Monitoring Report, and budget in a specific format. The information should be provided in the exact format requested without deviation. If you have questions about completing Part 1 of the report contact your Chapter Relations Manager (CRM) at HQ.

Part 2 of the report is not a fill-in-the-blank exercise. This is the portion of the report where you provide background on your previous implementation and explain what you hope to accomplish on your upcoming trip. If you have questions about completing Part 2 of the report, contact your project's assigned Project Engineer (PE) at HQ.

Pre-screening of the Report: Prior to a complete review of this document, it will be screened for compliance with the most basic requirements for a complete submittal. Specifically, the submittal must 1) include a Health and Safety Plan (HASP), 2) have a qualified Professional Mentor on the travel team and 3) include an executive summary, or it

will be rejected and the chapter must re-submit when those items are included. This will likely necessitate postponing travel.

Part 1: Administrative Information – Instructions

1.0 Contact Information: Fill in the table completely with updated contact information for current project leaders. This information will be used by HQ staff to contact your project team throughout the review process.

2.0 Travel Team: Include information for all the travel team members.

Professional Mentors: Please note, we have stringent requirements for our Professional Mentors, which apply to both student and professional chapters. Qualified Professional Mentors on the travel team must have experience as outlined on our website. This is usually at least 5 years of direct professional experience (post bachelor's degree, non-academic) in design and construction of infrastructure similar to that proposed in the project. These requirements can be found on the website under Member Pages - Chapter Resources - Sourcebook Downloads – “405 - Mentor Qualifications”. The team must have mentor coverage for the entire trip.

Travel Team Size: The size of the travel team should be based upon the requirements of the project. The maximum travel team size is eight. Most trips should be smaller.

Health and Safety Officers (HSOs): The Travel Team must have two HSOs currently certified in both CPR and First Aid as explained on our website Member Pages – Project Process – Health and Safety Program. The website also explains when additional training may be required of the HSOs because of site-specific hazards.

Planning, Monitoring, Evaluation and Learning (PMEL) Lead: The Travel Team must have a PMEL Lead identified. If the PMEL Lead is not traveling, then a designated substitute for the trip should be listed. The traveling PMEL Lead should be familiar with the EWB-USA PMEL Program and the associated resources explaining the role and responsibilities of the PMEL Lead.

Travel Team not Finalized: If the team is not yet finalized, fill in the table using “student” or “professional” nomenclature instead of the name of the individuals. The Professional Mentor Lead must be listed by name in the table. If the Professional Mentor Lead has not been determined, the report will be rejected and the chapter will be required to resubmit the document when the Professional Mentor is finalized.

Multiple Teams: If there is more than one travel team, please indicate this either with multiple Travel Team tables or with a text explanation after the table. There must be a qualified Professional Mentor and two HSOs at the site at all times.

3.0 Health and Safety: All EWB-USA trips require a site-specific Health and Safety Plan (HASP) as explained on our website – Member Pages – Project Process – Health and Safety Program.

Update your previously approved HASP with information for the current trip and submit the updated HASP at the same time as this 525B report. In this document, simply state that your HASP was previously reviewed and approved by EWB-USA and that you will comply with the updated HASP that has been submitted as a stand alone document along with this pre-trip report.

- 4.0 Planning, Monitoring, Evaluation and Learning (PMEL):** All EWB-USA trips require a dedicated focus on the study of the impact your team is having in the community as explained on our website – Member Pages – Project Process – Planning, Monitoring, Evaluation and Learning Program. The website also contains the required documents to guide your PMEL Lead in developing a comprehensive plan to study our impact.
- 4.1 For this document, simply indicate that your travel team has reviewed the template for the program-specific 901B – Program Impact Monitoring Report for the upcoming trip and has assigned team members to focus on completing this report during the upcoming trip. Indicate your acknowledgement that a completed 901B is required at the same time as your 526 – Post-Implementation Report or the document will be rejected and the chapter must re-submit when the current 901B is included.
- 4.2 Indicate that your team has selected project-specific indicators from the 906 Project Monitoring Indicators chart to continually monitor the project over time. Your team will need to use the indicators previously selected as appropriate for your project *before* you travel to allow you to gather the requisite data to complete the monitoring charts in your post-trip report.
- 5.0 Budget:** Complete and insert the 508 -Trip Budget Worksheet available on the Sourcebook Downloads page of the EWB-USA website. Follow all instructions that are included in the worksheet. Be sure to delete all instructional notes before inserting the final table here.
- 6.0 Project Discipline(s):** The headings in bold are project types, the subheadings are project disciplines. Check all project disciplines addressed in this report. Note that each project type needs to be approved by an EWB-USA Project Engineer. If this is a new project that has not previously been approved, your chapter may need to submit a 501B – New Project Within Existing Program Application.
- 7.0 Professional Mentor Resume(s):** Attach the resume for the traveling Professional Mentor **even if you have attached it in a previous report**. If this person is different than the Responsible Engineer in Charge (REIC), please also include the resume of the REIC. Please see document 405 - Mentor Qualifications for requirements of Professional Mentors and the REIC. This can be found in the Sourcebook Downloads on the Member Pages of the website. In our review of the submitted resume, **we are most interested in experience outside of academic research, such as consulting, working in industry**, etc. Limit the length of the resume to four pages maximum. Mentors may also include in this section additional experience (building one's own house, detailed EWB-USA experience related to the project, etc.) that makes them qualified to oversee the functions to be completed on this planned trip.

Part 2: Technical Information - Instructions

1.0 Description of What Has Been Implemented: Provide a description of what project components have already been implemented in the community.

2.0 Description of What Needs To Be Implemented: Provide a brief description of what still needs to be implemented.

If you are returning to the site for monitoring purposes only, you should be submitting the 530 – Pre-Monitoring Report instead of the 525B.

If you are planning on educational activities during this trip and have not submitted your educational materials previously, please attach them to this report for our review.

If you also plan to assess for a new project during this trip, you would also need to submit a 521-Pre-Assessment Report for that work. Note that each project type needs to be approved by an EWB-USA Project Engineer. If this is a new project type that has not previously been approved, your chapter may need to submit a 501B – New Project Within Existing Program Application.

3.0 Was this Return Implementation Trip Planned as Part of a Phased Construction:
Answer yes or no.

3.1 If no: Provide an explanation of why the implementation was not completed during the previous trip. This section gives you a chance to describe any extenuating circumstances that may have arisen.

4.0 Site Assessment: Complete this section only if your chapter is carrying out assessment activities that are related to the project that is the subject of this report. If you plan to assess for a new or different project under this program during this trip, you would also need to submit a 521-Pre-Assessment Report for that work. In this case, reference should be made to the 521-Pre Assessment Report in this section. The Part I of the 525B and 521 reports should be similar. Note that each new project needs to be approved by an EWB-USA Project Engineer. If this is a new project that has not previously been approved, your chapter will need to submit a 501B – New Project Within Existing Program Application.

5.0 Professional Mentor Assessment: This section must be filled out by the REIC and is required for review. You should discuss the requirement in this section with your REIC ahead of time to accommodate their schedule in anticipating the submittal deadline. If the REIC is not traveling, it is expected that the traveling Professional Mentor also fill out this section. Any other Professional Mentors who have contributed to this phase of the project are also encouraged to include their assessment here.

5.1 Professional Mentor Name and Role: Type the name of the Professional Mentor who is writing this assessment and specify if they are the REIC and/or traveling Professional Mentor.

5.2 Professional Mentor Assessment: The Professional Mentor should write a short assessment of how the current report came together, and where the project is currently at. The mentor should include project and program overview

information here from a broad, high level perspective. This assessment can include lessons learned, successes, and steps forward for the chapter and the project. The assessment should also explain why you feel the chapter is fully prepared for the trip, or what additional preparations must be made before travelling.

- 5.3 Professional Mentor Affirmation: The Professional Mentor should write one sentence here acknowledging their involvement in the design development phase and their acceptance of responsibility for the course that the project is taking.