

Instructions for INFFER's electronic Project Assessment Form (INFFER step 3)

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INFFER's electronic Project Assessment Form (PAF) is a web-based tool that collects and processes all the information needed to evaluate an individual project. The address for the site is www.inffer.nrms.net.au. Before you try to use the web site, please read the sections below on "Browser tips before you get started" and "Using the site".

The PAF is step 3 of a comprehensive process, extending from initial identification of natural assets for potential investment, through to monitoring and evaluation of funded projects (Table 1). It is designed to provide a detailed feasibility assessment of the assets identified as good prospects for investment in steps 1 and 2 of INFFER.

Table 1. Steps in the INFFER process

	Description of Step	Relevant Document
1.	Develop a list of significant natural assets in the relevant region(s)	"Significant Asset Identification Guide"
2.	Apply an initial filter to the asset list, using a simplified set of criteria	"Filtering Significant Assets Prior to Detailed Assessment"
3.	Define projects and conduct detailed assessments of them	"Project Assessment Form", and "Project Assessment Form Instruction Manual" (this document)
4.	Select priority projects	"Selection of Priority Projects"
5.	Develop investment plans or funding proposals	"Development of investment plans or funding proposals"
6.	Implement funded projects	"Implementation of funded projects"
7.	Monitor, evaluate and adaptively manage projects	"Monitoring, Evaluation and Adaptive Management following INFFER Assessment"

INFFER provides guidance about steps 1 to 4 and 7, and the output of INFFER provides information needed for steps 5 and 6. There are separate documents available on the INFFER web site (www.inffer.org) about each of these steps.

The INFFER Project Assessment Form (PAF) (Step 3) serves three purposes:

- (a) It supports the development of a project to protect or enhance a natural asset. If the form is followed closely, the project will be internally consistent, meaning that the works specified will be consistent with the project goal, the project interventions will prompt

sufficient adoption of the works, and the costs will accurately reflect the project interventions. Internal consistency is crucial so that the project can be accurately and fairly assessed. If the form is used to assess an existing project, then it provides a test of whether that project is internally consistent and, if not, it highlights where the areas of inconsistency are.

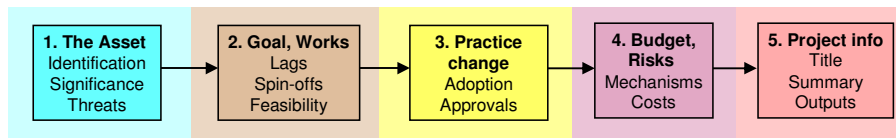
- (b) It collects and processes the information needed to use the Public: Private Benefits Framework to identify appropriate policy mechanisms for the project.
- (c) It collects comprehensive information in a form that allows the project to be assessed. The assessment asks how substantial the benefits of the project are relative to the costs. Benefits may be tangible (e.g. financial benefits) or intangible (e.g. some environmental benefits) or both.

The thinking behind this step

The Project Assessment Form is designed to be as simple as we can make it, while being sufficiently comprehensive to provide an adequate assessment of the alternative projects. The response to each question is simple – often just a score from a five-level scale.

The information is collected in a logical order. The answers to later questions often depend on the answers to questions earlier in the form, as shown in Figures 1 and 2.

Figure 1. Simple flow diagram of the INFFER Project Assessment Form.



The information collected in the form is integrated in a very precise way to evaluate the value for money from each project. The questions are designed in a particular way to feed into the calculation of a Benefit: Cost Index, and that index is designed to be highly consistent with the logic and rigour of a Benefit: Cost Ratio calculated in a Benefit: Cost Analysis. The main difference between INFFER and a Benefit: Cost Analysis is that we do not usually attempt to quantify benefits in dollar terms (although if asset value was estimated in dollar terms, then the INFFER Benefit: Cost Index would be exactly equivalent to a Benefit: Cost Ratio).

Who is the audience for the form?

We see four audiences for the Project Assessment Form.

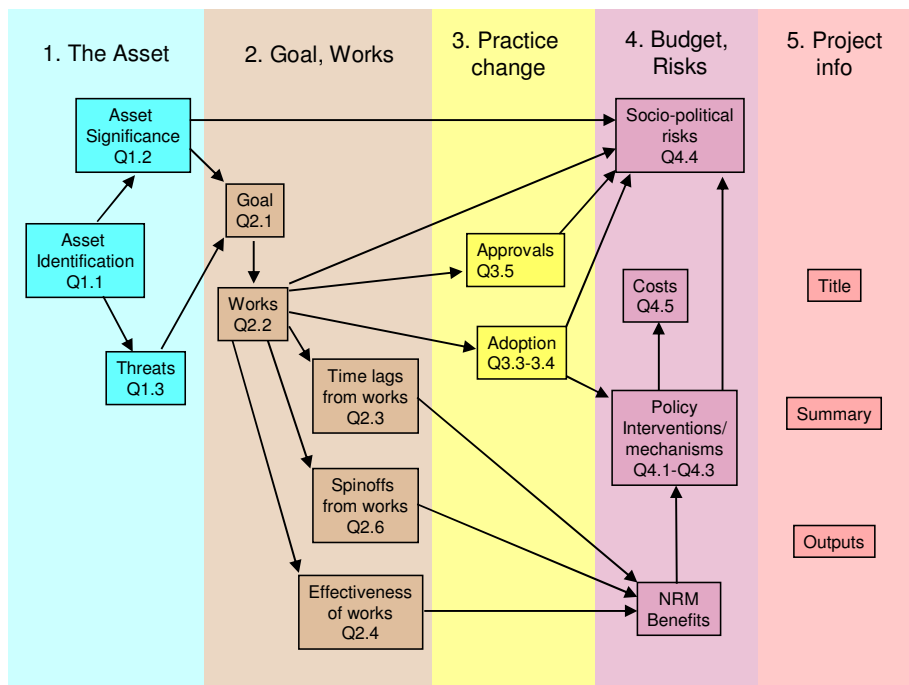
- (a) The people completing the form. In its role as a project development tool, it provides feedback to these people about the internal consistency of the project they have defined, and about the relative value for money of that project.

(b) Strategic decision makers within the organisation. They may find the Project Assessment Report (automatically generated after completing the form) to be sufficient for decision making purposes, but they may also wish to examine the complete form for more details about a specific project.

(c) External funding agencies. Most funders will only examine information provided on their own funding proposal template. Proponents using INFFER would transfer information from the PAF into that template. Some funders may wish to access the complete PAF to check detailed information about a proposed project. The full PAF might also help funders to redesign their own proposal template to include all relevant information.

(d) Reviewers. Audiences (b) or (c) may require proposals to be reviewed by experts in relevant areas. Access to PAFs would assist these reviewers, especially where relevant information is not provided in the standard proposal template for a funder.

Figure 2. Detailed flow diagram of the INFFER Project Assessment Form*.



*Figure 2 includes all the main elements of the assessment but omits some minor elements.

Browser tips before you get started

The PAF web site has been tested successfully on each of the four main web browsers: Internet Explorer, Firefox, Chrome and Safari. The first three work fine. Safari works fully on a Mac, but we found a few problems using Safari in Windows so we don't recommend it. If using Internet Explorer, we recommend that you use version 7 or later.

For the instructions below, you may need to know which browser you are using. If you are unsure, here's how to tell. Internet Explorer says "Windows Internet Explorer" in the top line of the screen or the window once it has started up. To see which version you are using, select Help > About Internet Explorer from the menu. Firefox say "Mozilla Firefox" in the top line. Safari is the default browser on Macs, but there is also a version available for Windows. The Windows version says "Apple - Start" in the top line. Chrome (by Google) is not very prominently labelled when it starts up – just a small "Google" next to the top right buttons. To be sure it is actually Chrome, click on the spanner near the top right corner, and there should be an option saying "About Google Chrome".

There are two issues that may arise the first time you use the PAF on a particular browser.

(a) Pop-up blockers

You probably have pop-up blocking switched on by default. To use the PAF web site, you must have pop-up blocking switched off, at least for this site. If you are clicking on the Edit button on the PAF List page (see below) but no PAF is appearing, the problem is probably pop-up blocking. You need to let your browser know not to block pop-ups for this site. The process for doing that is different for each browser.

Internet Explorer: Click the Tools menu item, point to Pop-up Blocker, and then click Pop-up Blocker Settings. In the "Address of website to allow" box, type the address (or URL) of the website you want to see pop-ups from (*.nrms.net.au), and then click Add.

Firefox: When blocking a pop-up, Firefox displays an information bar saying "Firefox prevented this site from opening a pop-up window", with an Options button to the right of that. Click on the Options button and select "Allow pop-ups for this site". You can also allow pop-ups by selecting Tools > Options > Content from the main menu.

Safari: Choose Action menu > Block Pop-Up Windows to turn off the checkmark or tick appears next to that menu item. (The Action menu is near the upper-right corner of the Safari window, and looks like a gear.)

Chrome: When Chrome blocks pop-ups for you, a small blue and white icon with a red "X" on it appears in the far right side of the address bar. If you click on this icon, you can see a list of the pop-ups blocked for that page. You can click on the items in this list to view them, and you can also select the box to "Always allow pop-ups" from the site you're on (refresh for this change to take effect). To manage the sites on this pop-up "whitelist," or to disable the pop-up blocker entirely, go to Tools > Options > Under the Hood > Content settings > Pop-ups.

(b) Correct installation of a pdf reader

If you use Internet Explorer, you don't have to worry about this.

Section 6 of the PAF provides a summary Project Assessment Report. In browsers other than Internet Explorer, this consists of a pdf file that displays within the web page. To view

this, you must have a pdf reader (such as Acrobat Reader) or browser pdf add-on installed. Acrobat Reader is free from the www.adobe.com web site.

If you click on the tab for Section 6, two things could go wrong if you don't have a pdf reader installed correctly: (a) The Project Assessment Report might not display at all; (b) The pdf reader software might run and display the report separately from the PAF web site. While this latter situation is not a disaster, it is not ideal. The system works better if the report displays within the browser.

If you don't have a pdf reader or browser add-on installed, install one.

If you do have a pdf reader installed but you get problem (b), on a Windows computer try uninstalling it, downloading the latest version and reinstalling it. You need to have the browser you are going to use installed before you install the pdf reader.

To uninstall it, run Control Panel (hopefully you can see it in the Start Menu). In Windows Vista, double click on "Programs and Features", while in Windows XP the option is called "Add or Remove Programs". Then go to www.adobe.com, download the latest version and follow instructions to install it.

If the problem persists, use Google to search for advice, by searching for: opening pdf files in (your browser).

If you use Firefox, this is the page to read:

<http://support.mozilla.com/en-US/kb/opening+PDF+files+within+Firefox>

This is particularly recommended if you use Firefox in a Mac but also helpful in Windows. It displays different information depending on whether you open it in a Mac or in Windows.

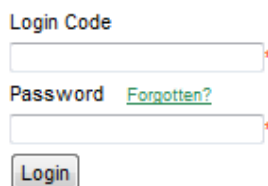
Using the site

Logging in

When you enter the site, you first have to log in. Enter your Login Code and Password in the appropriate boxes, and click on the Login button.

If you don't have a Login Code but would like to explore the site, use the Login Code **Guest** and the Password **Guest**. (These are case-sensitive.) You will be able to view (but not edit) some example Project Assessment Forms, and you will be able to create a new PAF that you can edit.

If you require a proper Login Code and Password for serious use of the system, contact Geoff.Park@nccma.vic.gov.au/0418 138 632 or Jennifer.Alexander@dpi.vic.gov.au/03 5430 4345.



Login Code

Password [Forgotten?](#)

Login

Once you are logged in, click on the green "INFFER" button at left of screen.



Then click on “PAF List” to edit a PAF or create a new one, or if you are a new user, click on “Instructions” for information on how to use the system. (The same information is provided below.)



On the PAF List page

If there are already any existing PAFs available, they are displayed under this heading:

PAF ID	Asset	Project Title	People Responsible	Date Created	Created By	Date Updated	Updated By	PAF Permissions	Comment Permissions	Checked Out By	Checked Out On
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To create a new PAF, click .

To edit an existing PAF, click on that PAF in the table and then click . If you click on this button but no PAF appears, first make sure that you clicked on the relevant PAF in the table before clicking on Edit. If you did that properly and still no PAF appears, you probably need to switch off pop-up blocking for this site. Refer to the earlier section on pop-up blockers (page 4).





If the second button says View rather than Edit, it means either (a) that someone has already checked out the PAF for editing – you will be able to view the PAF but not to edit it until they finish editing it, or (b) that you don't have permission to edit it.

To delete an existing PAF, click on that PAF in the table and then click . If the button is greyed out, it means you don't have permission to delete this PAF.

Once you are editing a PAF

To enter a response to many questions, you need to click on the button to the left of the response box. If there is no button (questions 1(a) and 2.3(a)) just click inside the response box to enter your response. If there are no Edit buttons for any question, it means that the PAF has been checked out by somebody else, and you are able to view but not edit until they finish editing it.

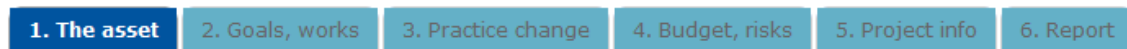
For each question there are four small buttons to provide guidance and help:

-  *Details*. This provides additional explanation of the question. If you are new to INFFER, you should check these details for every question before finalising your responses.
-  *Example answer*. One or more example answers to the question.
-  *Relevance*. Why this information is needed and where it gets used within the INFFER system.
-  *FAQs*. Frequently Asked Questions that are relevant to this PAF question.

If a button is greyed out, it means that there is no information of this type available for this question.

Each main question heading has a **Comments** button. The intended use for this is to allow reviewers to provide feedback to the PAF user about their response to the question, and for the PAF user to record a response to the feedback. For example the PAF user might record that they have made changes in response to the feedback, or else provide reasons why they have chosen not to make changes. If the text on the button is red, **Comments**, it means that there is at least one comment stored for this question.

There are six sections to the PAF. Different sections are accessed by clicking on the tabs at the top of the screen. The highlighted tab indicates which section is currently displayed.

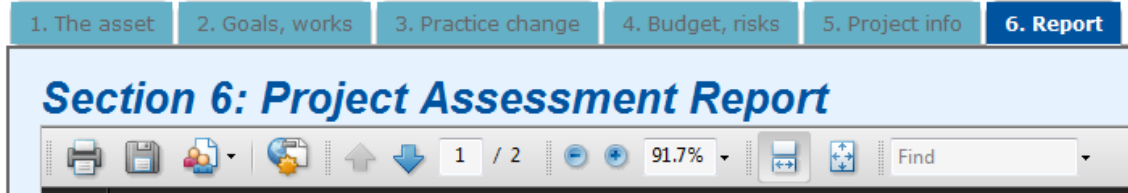


The sequence of sections and questions has been very carefully chosen, and it is recommended that you work through the questions in order. However, you are able to jump to any section and work on any question if you need to.

As you enter or edit each question, it is automatically saved in the PAF database. There is no “Save” button, because it is saved continuously.


At the end of the fifth section, there is an option to print all of the input data that has been entered. If you have a pdf printer driver installed, you can save the data to a pdf file. A free pdf printer driver is available at www.pdf995.com.

The sixth section of the PAF is the Project Assessment Report section. The report is generated automatically, providing a summary of key information about the project, and presenting the Benefit: Cost Index for the project. This report can be viewed on the screen, printed or saved as a pdf file.



To print the file, click on the printer icon (the left most icon in the toolbar above). To save it as a pdf file, click on the disk icon (second from the left).

Note that the toolbar will be different depending on which pdf reader you have installed (and on a Mac you may not see any toolbar – you can print and save using the browser menu). The picture above shows the toolbar for Acrobat Reader 9.

When you finish with the PAF and wish to exit, click on the  button at the top-right of the screen.