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ENERGY POLICY PROGRAM CAPACITY BUILDING STRATEGY

APRIL 2014

This publication was produced for review by the United States Agency for International Development. It was prepared by Advanced Engineering Associates International, Inc.

ENERGY POLICY PROGRAM CAPACITY BUILDING STRATEGY

Submission Date: April 16, 2014

Contract Number: AID-EPP-I-00-03-00004

Order Number: AID-391-TO-12-00002

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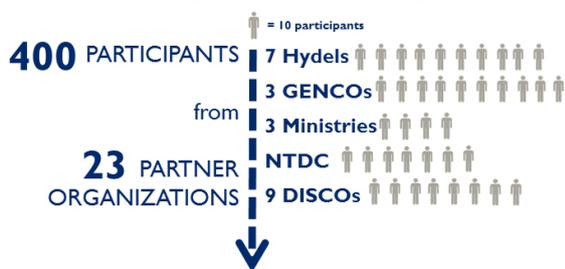
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EXECUTIVE SUMMARY

The EPP is a multiyear USAID funded initiative to increase power generation, decrease losses and increase cost recovery in Pakistan’s power sector by working with selected energy infrastructure and facilitating GOP reform efforts with technical assistance and new technology. The EPP focuses on the following four components:

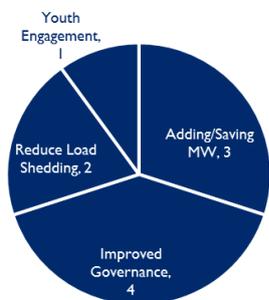
- **Component I**- Monitoring & Support of Project Implementation of G2G projects
- **Component II** – Advice and Support of Energy Sector Policy Reform
- **Component III** – New Projects, Planning and Development Due Diligence
- **Component IV** – Transmission and Natural Gas Sector Support

From March 2012 – December 2013, the Energy Policy Program (EEP) trained approximately 105 participants in a mix on in-country and third country training activities to increase sustainable energy supplied to the economy. EPP reduced transmission bottlenecks and introduced best practices to GENCOs through technical training of staff along with policy development and installations and



rehabilitations of equipment. Additionally, EPP successfully held a country-wide internship program to increase young graduates’ technical capabilities and experiences with Government of Pakistan (GOP) implementing partners.

Building capacity in 5 priority objective areas and will result in:



- 20 Best practice driven systems implemented
- 10 Installations and O&M improvements
- 9 Transmission bottlenecks resolve
- 6 Key policies and regulations in development stages
- 5 Government/Citizen Public Forum

Moving forward, the EPP developed a cross-cutting activities team to oversee all capacity building programs, gender integration, and monitoring and evaluation requirements to insure compliant training delivery and strategic development of planned and on-going capacity building activities. The Cross-Cutting Team will work with EPP project managers to strengthen the technical skills of relevant GOP implementing partner staff and stakeholders through technical workshops, on-the-job training activities, in-country training series, and exchange visits to promote international best practice standards and sustainability. As a result of training programs, the EPP will increase

develop sustainable best practice methodologies across select power sector entities (PSE) to increase the efficiency and amount of energy delivery to the consumers. The EPP will streamline a capacity building approach and participant training programs to guarantee contract compliance and impact of future programs. These processes are outlined in the **Training Management Plan** and are accompanied by the strategy annexes with templates and procedures for in-country, third country, and U.S. based training.

To develop the best practices across all PSEs, the EPP’s capacity building strategy will focus on developing ministry and private sector decision-makers, technical crews, systems operators, and engineers responsible for managing and operating energy institutions. All approved and potential programs are outlined in the **FY2014 Capacity Building Activities & Strategy** narrative section.

FY2014 – FY2015 PARTICIPANT TRAINING PLAN TABLE

Development Objective: I. Increased Sustainable Energy Supplied to the Economy

Total Allocated Budget: TBD

PROGRAMS CURRENTLY UNDERWAY - PRIORITY A

No.	Suggested Training Program Title	Key Learning-Training Objectives for Program	Location of Training event	Suggested Training Providers	No. of Part	Participant Characteristics	Duration (weeks or months)	Start Date	End Date	Est. Budget
1	WAPDA Operations & Maintenance Thermal Training	The O&M training activity will create sustainable O&M practices. The EPP will instruct participants on how to perform an in-depth analysis of current practices and methodologies and train the personnel on best practices to operate, maintain, and manage the power plant assets as per PPAs.	Islamabad, Pakistan	Dinsons	60	GENCO personnel at thermal plants with technical abilities to operate and manage thermal power plants	2 weeks each (3 planned series of 20 persons each)	Mar-14	Jun-14	\$ 260,000
2	Live Line Training Assessment	To refine the current NTDC Tarbela Training Center methods for 132 kV training. The updated materials will be used to complete the Live Line series for the remaining four DISCOs.	NTDC Training Center	NTDC	N/A	N/A	4 weeks	Apr-14	Jun-14	\$ 44,000
3	NTDC Senior Staff Exchange Visits	The objective of the exchanges would be to share best practices in grid, market, and commercial operations, as well as utility commercial processes, thereby improving capacities in Pakistan's power sector while establishing professional relationships for NTDC to draw upon after the conclusion of the program.	U.S. Based Locations TBD	USEA	27	NTDC Senior and mid-level managers and engineers	2 weeks for each of three training groups	Jul-14	Oct-14	\$ 304,165

No.	Suggested Training Program Title	Key Learning-Training Objectives for Program	Location of Training event	Suggested Training Providers	No. of Part	Participant Characteristics	Duration (weeks or months)	Start Date	End Date	Est. Budget
4	LNG Business and Operations Intensive Seminar Program	To support the development of the LNG industry, the EPP will send key decision makers to receive formal training in LNG markets and design.	N/A	N/A	8	Nominees from SSGC, PQA, ISGS, and MPNR	2 weeks	Aug-14	Sep-14	\$ 68,000
5	NTDC Training Program	The training program will complement the installations, equipment, and hardware developments for the NTDC design center as well as other small training programs for sustainability	Lahore, Pakistan	TBD	50	NTDC staff in design department and select groups	5 months	Jul-14	Dec-14	\$ 250,000
6	GENCO and NTDC Board of Director Exchange Visits	Given the G2G funding and installations at NTDC, EPP wants to support and Board of Directors comparative retreat to push policy objectives and business plans	Third Country	TBD	40	Board of Director members of GENCOs and NTDC	2 weeks per session (4 total)	Aug-14	Mar-15	\$ 500,000
7	WAPDA Operations & Maintenance Hydel Training	The O&M training activity will create sustainable O&M practices. The EPP will instruct participants on how to perform an in-depth analysis of current practices and methodologies and train the personnel on best practices to operate, maintain, and manage the power plant assets as per PPAs.	Islamabad, Pakistan	TBD	60	GENCO personnel at hydro plants with technical abilities to operate and manage hydro power plants	2 weeks each (3 planned series of 20 persons each)	Apr-14	Jun-14	\$ 136,000
8	LNG Tug Boat Operators Training	Provide trainer to come to Karachi and teach regarding fire safety, tug boat operations, and best practices in maintenance and navigation.	Karachi, Pakistan	TBD	16	Current tug boat operators in Port Qasim Authority (PQA)	3 weeks	Sep-14	Oct-14	\$ 267,000
9	LNG Stakeholder Forum	To have stakeholder organizations attend technical workshops over multiple day conference. This will assist in the facilitation process among the many stakeholders and generate the sense of community in the LNG sector new to Pakistan	Islamabad	QED, other LNG Expertise Firm for facilitation	20 to 30	Senior and Mid-Level Managers responsible for LNG at PSO, SSGC, ENGRO, PQA, ISGS, MPNR, OGRA, and MOPS.	1 week			\$ 65,000
									TOTAL	\$ 1,894,165

PLANNED PROGRAMS - PRIORITY A

No.	Suggested Training Program Title	Key Learning-Training Objectives for Program	Location of Training event	Suggested Training Providers	No. of Part	Participant Characteristics	Duration (weeks or months)	Requisition Date	End Date	Est. Budget
1	Dissemination of EPP Activity Workshops	EPP will host energy stakeholders for a seminar series focused on power sector topics to engage GOP officials with private investors and stakeholders. Topics will include the policy priority area topics.	Nationwide	EPP	200	Private and Public sector participants	TBD	Aug-14	May-15	\$ 60,000
2	Live Line Maintenance Training Refresher Course & Train-the-Trainer	To develop sustainable live line methodology and in-house training opportunities, the EPP will identify select linemen to lead DISCO education. Additionally, the EPP will provide a refresher course for those who previously trained the live line training course once the hot tools arrive in Pakistan.	NTDC Tarbela Training Center and on-site for each DISCO	NTDC Tarbela Training Center	37	Previously trained linemen from 8 DISCOs	3 weeks for each training	May-14	Oct-14	\$ 77,700
3	Shale Gas Stakeholder Forum	To have stakeholder organizations attend technical workshops over multiple day conference. Given the development of the shale gas exploration and production in Pakistan, the forum will engage all relevant stakeholders with technical experts and present the proposed policy framework for shale gas.	Islamabad	TBD	25	Senior and Mid-Level Managers responsible for shale gas and exploration and production.	1 week	Jun-14	Sep-14	\$ 65,000
No.	Suggested	Key Learning-Training Objectives	Location of	Suggested	No.	Participant	Duration	Requisition	End	Est. Budget

	Training Program Title	for Program	Training event	Training Providers	of Part	Characteristics	(weeks or months)	Date	Date	
4	NTDC Tarbela Training Center Rehabilitation	The only live line training center in Pakistan requires a modern rehabilitation to support continuing education in Pakistan. In addition to physical rehabilitation, a 3rd party review of current programs will make recommendations and implementation strategy for best practices.	NTDC Tarbela Training Center	TBD	TBD	NTDC Tarbela Training Center Staff	3 months	Jun-14	Dec-14	\$ 211,900
5	GENCO I Operations & Maintenance Custom Audit Training	To expand on the teachings of the best practices in thermal O&M training, an expert will review a sample unit from the GENCO and design a custom training in best practices. This will increase efficiency and compliment the GENCO business plan and sustainability for the G2G support.	GENCO I on-site	TBD	20 to 30	Technical staff, recipients of O&M training FY2014 Qtr. 2 and 3, etc.	1 week for audit	Jun-14	Jan-15	\$ 50,000
6	GENCO II Operations & Maintenance Custom Audit Training	To expand on the teachings of the best practices in thermal O&M training, an expert will review a sample unit from the GENCO and design a custom training in best practices. This will increase efficiency and compliment the GENCO business plan and sustainability for the G2G support.	GENCO II on-site	TBD	20 to 30	Technical staff, recipients of O&M training FY2014 Qtr. 2 and 3, etc.	1 week for audit	Jun-14	Jan-15	\$ 50,000
No.	Suggested Training	Key Learning-Training Objectives for Program	Location of Training event	Suggested Training	No. of	Participant Characteristics	Duration (weeks or	Requisition Date	End Date	Est. Budget

	Program Title			Providers	Part		months)			
7	GENCO III Operations & Maintenance Custom Audit Training	To expand on the teachings of the best practices in thermal O&M training, an expert will review a sample unit from the GENCO and design a custom training in best practices. This will increase efficiency and compliment the GENCO business plan and sustainability for the G2G support.	GENCO III on-site	TBD	20 to 30	Technical staff, recipients of O&M training FY2014 Qtr. 2 and 3, etc.	1 week for audit	Jun-14	Jan-15	\$ 50,000
8	Mangla Operations & Maintenance Custom Audit Training	To expand on the teachings of the best practices in hydel O&M training, an expert will review the plant's operations and design a custom training in best practices. This will increase efficiency and compliment the EPP improvements made with G2G funding and promote sustainable best practices	Mangla Dam	TBD	20 to 30	Technical staff, recipients of O&M training FY2014 Qtr. 2 and 3, etc.	1 week for audit	Jul-14	Feb-15	\$ 50,000
9	Tarbela Operations & Maintenance Custom Audit Training	To expand on the teachings of the best practices in hydel O&M training, an expert will review the plant's operations and design a custom training in best practices. This will increase efficiency and compliment the EPP improvements made with G2G funding and promote sustainable best practices	Tarbela	TBD	20 to 30	Technical staff, recipients of O&M training FY2014 Qtr. 2 and 3, etc.	1 week for audit	Jul-14	Feb-15	\$ 50,000
No.	Suggested Training Program Title	Key Learning-Training Objectives for Program	Location of Training event	Suggested Training Providers	No. of Part	Participant Characteristics	Duration (weeks or months)	Requisition Date	End Date	Est. Budget

10	Gomal Zam Operations & Maintenance Custom Audit Training	To expand on the teachings of the best practices in hydel O&M training, an expert will review the plant's operations and design a custom training in best practices. This will increase efficiency and compliment the EPP improvements made with G2G funding and promote sustainable best practices	Gomal Zam	TBD	20 to 30	Technical staff, recipients of O&M training FY2014 Qtr. 2 and 3, etc.	1 week for audit	Jul-14	Feb-15	\$ 50,000
11	Satpara Operations & Maintenance Custom Audit Training	To expand on the teachings of the best practices in hydel O&M training, an expert will review the plant's operations and design a custom training in best practices. This will increase efficiency and compliment the EPP improvements made with G2G funding and promote sustainable best practices	Satpara	TBD	20 to 30	Technical staff, recipients of O&M training FY2014 Qtr. 2 and 3, etc.	1 week for audit	Jul-14	Feb-15	\$ 50,000
12	NEPRA Generation and Transmission Benchmarking Workshop	To support the GENCO tariff changes, the EPP will provide a generation and transmission benchmarking workshop for NEPRA staff with coordination of PDP.	Islamabad	TBD	20	NEPRA decision makers, press, and ministry staff	1 week	Aug-14	Oct-14	\$ 20,000
TOTAL										\$ 784,600

PLANNED PROGRAMS – PRIORITY B

No.	Suggested Training Program Title	Key Learning-Training Objectives for Program	Location of Training event	Suggested Training Providers	No. of Part	Participant Characteristics	Duration (weeks or months)	Requisition Date	End Date	Est. Budget
1	Southern Regional Training Center Development	Currently, the NTDC Tarbela Training Center is the only transmission and dispatch oriented training center in Pakistan and is located outside of Islamabad. To support the southern DISCOs, the EPP will assess the location, curriculum, staff, and procurement for a southern facility for NTDC	TBD	TBD	TBD	TBD	4 months	Jan-15	Jul-15	\$ 100,000
2	Women in Energy Internship Program	Using similar methods from the first EPP Energy Sector Internship Program, this second phase will focus on placing women in the stakeholder organizations with an emphasis on equal opportunity hiring and security.	Nationwide	TBD	40	Female, young graduates, pass technical test, have relevant technical degrees fitting the profile	6 months	Aug-14	Jan-15	\$ 115,400
									TOTAL	\$ 215,400

CAPACITY BUILDING ACTIVITIES & STRATEGY

PROGRAMATIC ACTIVITIES & STRATEGY

All upcoming and past capacity building programs will be aligned with this capacity building strategy to insure compliance of all activities in terms of process, reporting as well as alignment with USAID and EPP contract objectives. EPP is undertaking programmatic improvements to have all capacity building activities go through the Capacity Building Team's management procedures in order to support component activities more efficiently and within compliance. The following program activities and strategies will take place to insure compliance and USAID process under ADS 252, 253, and 206 as well as TraiNet reporting. The procedures are outlined in the following section "Training Management Plan."

CAPACITY BUILDING AND GENDER EQUITABILITY NEEDS ASSESSMENTS

The EPP will carry out GOP partner capacity building and gender needs assessments through site visits and interviews of appropriate GOP partner staff and stakeholders. The needs assessments will identify capacity building and gender equality gaps and develop recommendations for future training opportunities for GOP partners. The identified gap will differentiate between the following:

- **Current situation:** Review of current state of skills, knowledge, and abilities of the current and/or future employees of each partner organization. This analysis also should examine the organizational goals, climate, and internal and external constraints.
- **Desired or necessary situation:** Recommended necessary job tasks/standards, as well as the skills, knowledge, and abilities needed to accomplish these successfully. It is important that critical tasks necessary are identified, and not just observe current practices.

By defining a capacity building gap, the EPP will identify opportunities for staff training in long-term and short-term programs as well as opportunities for women and youth to engage in the energy sector. For gender equality, the EPP will deliver a baseline gender assessment of the GOP partner organizations to be considered for project design considerations. The baseline gender assessment will identify challenges of equality in employment in the energy sector, education opportunities to enter the energy sector, and analysis of existing policies. These needs assessments will develop the capacity building and gender strategies for the EPP to be included in future program activities.

EVALUATIONS OF PAST AND ON-GOING ACTIVITIES

The EPP will review past programs under the four component model for capacity building to determine if additional support is required, the training's effectiveness in reaching EPP goals, and the sustainability and reliability of the training program. Programs to be reviewed include:

- **Live Line Maintenance Training:** The EPP will undertake an assessment of the technical and programmatic output of the LLM training to determine improvements required for the remaining 5 training courses scheduled.
- **Power SIM:** The EPP will follow up with the four MWP section officers to determine if the Power SIM program has been implemented and what improvements the training can make before training CPPA. The follow up evaluation has already occurred and EPP will re-train nominated participants and develop an implementation strategy for long-term Power SIM use at the MWP.
- **Energy Sector Internship Program Sustainability Strategy:** Given the success of the internship program, the EPP will develop a sustainability strategy to review successes, challenges, and

impacts of the program. The strategy will outline development recommendations for future energy sector support with youth and gender equitable engagement.

- **Operations and Maintenance Training:** The EPP will conduct on-spot training evaluation at the end of each training course to obtain participants responses on how training went, newly-learned skills, participant's plans on the implementation of the learned skills and suggestions to improve future training courses. EPP will also conduct follow-up interviews following the completion of each operations and maintenance training. The evaluation will help EPP determine the effectiveness of the training courses and seek information on how the newly-learned skills are being implemented by the participants.

CAPACITY BUILDING REPORTING

The EPP will report on capacity building as a cross-cutting activity for all weekly, monthly, quarterly, and annual programmatic reports as well as a separate capacity building annual report to be submitted as supplement to the EPP annual report. EPP will continue to work with the USAID Capacity Building program advisors and USAID Training for Pakistan to determine best practices and approaches to strategic capacity building specific to the energy sector while supporting on-going activities.

The Capacity Building Advisor will maintain a capacity building database of all activities which occurred and were planned along with associated budgets, logistics, and impacts on EPP objectives.

CAPACITY BUILDING ACTIVITIES

GENERATION SUPPORT

Operations & Maintenance

In March 2014, the EPP kicked-off the first of three Thermal Operations and Maintenance (O&M) trainings focused on increasing best practices for GENCO I, II, III staff. In FY2014, the EPP will complete the GENCO and Hydel O&M trainings dedicated to increasing efficiency and management of hydro and thermal power plants. The training module focuses on best practices of supervision, repair and maintenance, international standards for testing, and technical solutions to increase efficiency.

The trainings consist of three programs for hydro and three for thermal with 20 participants in each session. Each training session is of two week intensive with trainers in Islamabad. EPP will reach out to the most qualified and appropriate participants for each of the hydro and thermal power plants and create a sustainable, impact driven program to increase efficiency. The EPP will develop a post-training evaluation and contact method to maintain ties with those participants.

On-Site Audit & Training

In addition to the classroom training hosted in Islamabad, the EPP plans to create an on-site O&M course that will focus on the unique challenges and solutions of each plant. A trainer will audit a particular area and/or unit and deliver a large training course on short, medium, and long term solutions to improve efficiency.

GENCO Board of Directors Exchange

The GENCO board of directors exchange visit will allow the current members to review third country thermal generation plants, boards, and supporting power sector entities. Through the exchange, the board will review best practices, efficient policies and management structures, as well as new technology.

LIVE LINE MAINTENANCE

Continued Training

In order to increase reliability, the EPP will continue to sponsor the live line maintenance (LLM) training series for DISCO crews throughout the country. The live line training on 132 kV and 66 kV transmission lines will be done at the National Transmission and Despatch Company (NTDC) training center for the four remaining DISCO crews. The training will be a 14 week program consisting of:

- 4 weeks of In-Class Training focused on Health and Safety standards when working on energized transmission lines
- 10 weeks of extensive in-the-field training, including supervision and on-the-job practice with hot-stick and bare hand maintenance techniques
- Post-training evaluation
- Train-the-Trainer element provides one member of each of the trained crews with additional instruction to have a sustainable training force for each of the DISCO crews

The LLM training program will create consistent, best practices nationwide and will create a more reliable network and have power available during preventive/corrective maintenance, increase revenues, and develop the capacity and sustainability of the current crews.

NTDC Training Center LLM Assessment

The EPP will conduct an assessment of the previous trainings before starting the second phase of trainings with the remaining 4 DISCOs. The assessment will outline improvements, USAID procedure compliance, as well as refresher course recommendation. The assessment will increase the training capacity of the staff at the NTDC training center, the only center of its kind in Pakistan. To further support the revised curriculum and materials of the NTDC training center's LLM program, the EPP will rehabilitate the training facilities to increase participation and the learning experience.

Refresher Course

To date, PESCO, HESCO, GEPCO, and FESCO have been trained with IESCO, LESCO, SEPCO, MEPCO, and QESCO remaining. The EPP will provide a refresher course to those participants that completed the program before January 2014. Due to procurement delays, the participants trained before January 2014 did not receive the hot tools each DISCO requires to perform LLM. The refresher course will be provided by the NTDC Training Center after curriculum is approved by the LLM assessment.

POLICY REFORM ACTIVITIES

Power System Integrated Model

The Power System Integrated Model (PowerSIM) that EPP has developed will enable senior energy sector stakeholders to make better policy decisions. Training for staff from the Ministry of Water and Power (MWP) has already commenced, and future training for all relevant GOP stakeholders is underway. PowerSIM allows stakeholders to forecast the financial impact of improved performance to an existing system, the impacts of new power infrastructure, and shifts in policy.

NEPRA Benchmarking Training

The EPP will design and host a generation and transmission benchmarking seminar intended for current NEPRA staff and stakeholders. The seminar will provide an important forum for stakeholders to engage and understand the benchmarking measures to be established.

NTDC CAPACITY BUILDING

Senior Management

EPP will host conduct three executive exchanges for NTDC to the U.S. to share best practices in grid and market operations, as well as utility commercial processes, thereby improving capacities in

Pakistan's power sector while establishing professional relationships for NTDC to draw upon after the conclusion of the program. The EPP will conduct three executive exchanges with nine NTDC officials on each exchange. The EPP will prepare three comprehensive agendas focused on the following:

- **Grid Operations** – best practices in transmission maintenance, operations and planning, including the integration and dispatch of renewable energy into the grid
- **Market Operations** – observe a market manager and control area operator, with focus on integrating renewable energy into the grid
- **Commercial Operations**– best practices in business process improvement, financial management and managing utility expenditures

The exchange locations are still to be determined; however EPP anticipates the exchanges taking place with the federal energy regulatory commission, independent systems operators, and policy making bodies. EPP anticipates this activity to start by the 3rd quarter of FY2014 and complete by the 4th quarter.

NTDC Board of Directors Exchange

The NTDC board of directors exchange visit will allow the current members to review third country transmission systems and management structures. Through the exchange, the board will review best practices, efficient policies and management structures, as well as new technology.

Rehabilitation of NTDC Design Center

To increase design center revenue and prepare for anticipated increases in design center workload, the EPP will rehabilitate the design center through purchases of hardware, software, and training. Through intensive software training programs and policy reforms, the NTDC Design Center will be transformed into a modern transmission design facility capable of handling the increased work load anticipated for future transmission design plans.

SHALE GAS TECHNOLOGY EXCHANGE

In order to develop Pakistan's nascent shale gas industry, EPP will support MPNR staff by facilitating a one week exchange to the Houston, Texas. There, MPNR staff will be introduced to new technology and procedures related to core sampling. The exchange will focus on building capacity to analyze and map wells to identify prime areas for further exploration of shale gas in Pakistan.

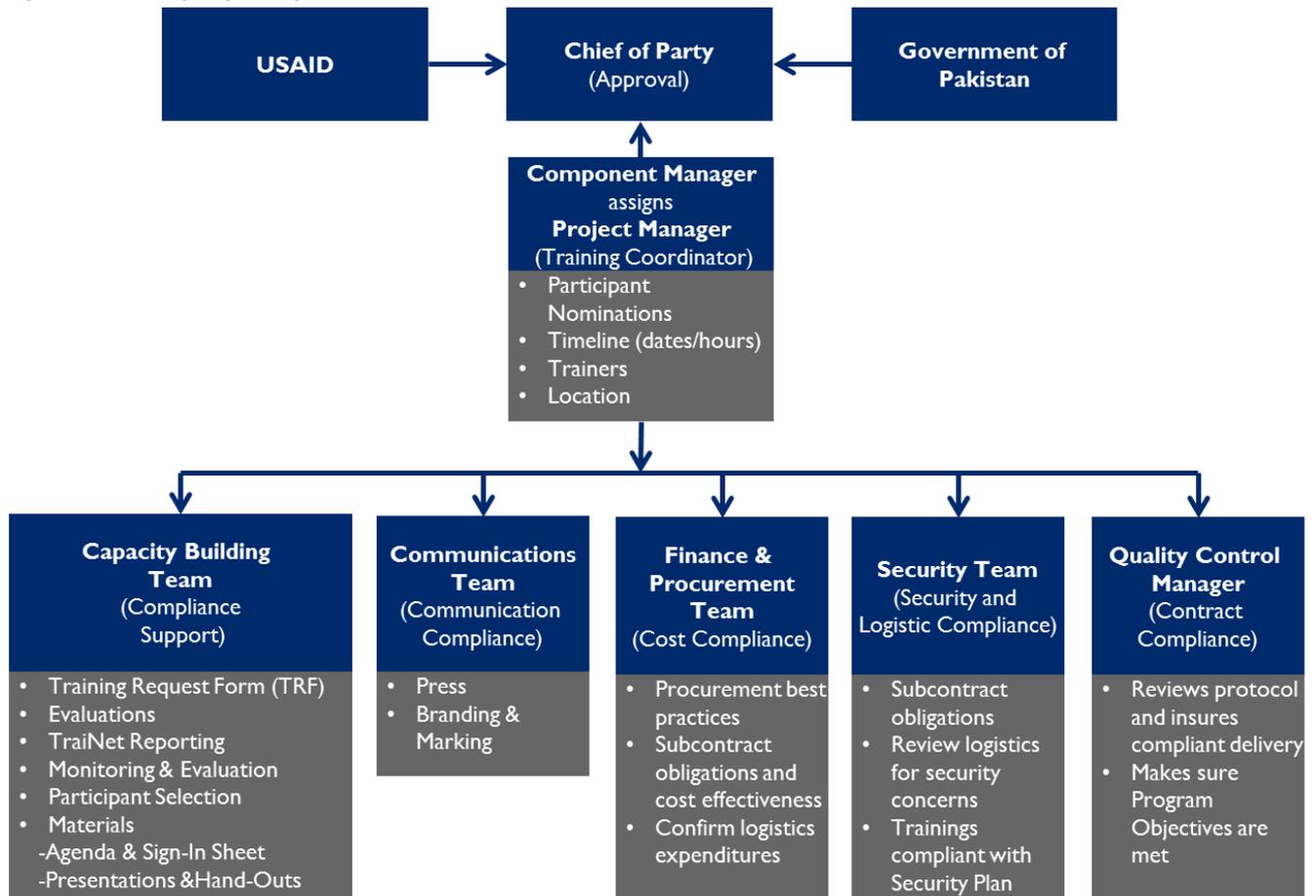
LNG SUPPORT

In 2012, EPP commenced support of the "Fast Track" Liquefied Natural Gas (LNG) Import Program. The program aims to build Pakistan's first LNG terminal through a Public-Private Partnership. The terminal will be capable of processing 400 million cubic feet per day (MMCFD) of LNG, and will lead to an increase in gas availability and improved energy security for Pakistan. EPP's efforts will strengthen the capacity of the Port Qasim Authority (PQA) and the Ministry of Petroleum and Natural Resources (MPNR) by deploying technology and best practices-driven training in commercial pricing of LNG, and terminal and port operations.

TRAINING MANAGEMENT PLAN

A participant training activity, whether it is in-country, third country, or U.S. based, will require a team including a Project Manager (Training Coordinator), Component Director, Quality Control Manager, Capacity Building Advisor, Communications Team, Procurement and Security Team. With ultimate approval of all capacity building activities concurred by USAID through the Chief of Party. The personnel and procedures for completing a training activity are detailed in the figure below:

Figure 1: Training Reporting Procedure and Personnel



The following list describes the specific responsibilities, timelines, and deliverables of each personnel position associated with a participant training activity under the EPP:

- Chief of Party:** The Chief of Party will act as the programmatic approver of any training under EPP. The Chief of Party will determine if training should be delivered after receiving approval from USAID and the relevant GOP entity. The Chief of Party will determine who the Project Manager is and the scope of the training activity as it aligns with the contract priorities.
- Project Manager:** The Project Manager will be the individual tasked with delivering a participant training activity from beginning to end with support of the EPP managers, advisors, and teams. This person acts as the training coordinator who develops the concept for the training, discovers the appropriate trainers and participants, and works with the stakeholder agency to conceive of the best venues and dates for the training activity. Four weeks prior to the scheduled training opportunity, the Project Manager will complete the *Training Request Form* (See Annex I) with the capacity building team. After Chief of Party approval, the Project Manager will work with the remaining advisors and teams to guarantee compliance for communications,

capacity building, finance, and security. The Project Manager will also complete the final training report with the assistance of the capacity building team.

- **Capacity Building Team:** The Capacity Building Team consists of the Advisor, Coordinator, and Assistant. The Capacity Building Advisor will manage the participant training activity team regarding required reporting, logistics compliance, and monitoring and evaluation. After the Chief of Party approved questionnaire has been sent to the Capacity Building Advisor, the Project Manager and Capacity Building Team will meet to further detail logistics of the training and set up a comprehensive schedule. This includes participant selection, the general criteria is available under **Annex V: Participant Selection Criteria**. Additionally, the Capacity Building Advisor will work with the communications team and Project Manager to complete the following branded documents two weeks prior to the training (see **Annex II: Training Required Documentation Templates**):
 - Sing-In Sheet (1 for each day of training, signed each day)
 - Participant Evaluation (1 for each present participant)
 - Communications Team approved Materials (i.e. signs, hand-outs, Power Point Presentations, other training materials)
 - Final Agenda

In the event of the training being U.S. based, the Capacity Building Team will begin the timeline and documentation process outlined in **Annex III: Training Activity Timelines** and **Annex VI: Exchange Visitor J-1 Visa Packet**. The Capacity Building Team will work with the Project Manager to determine the training activity timeline (based on **Annex III: Training Activity Timelines**) for scheduling of purchases and logistics. In the event the Capacity Building Advisor is not present during the training activity, it will be the Project Manager's responsibility to collect the sign-in sheets, presentations, and participant evaluations and return them to the Capacity Building Team within 10 days of the completion of the training. Within 30 days of the training activity, the Capacity Building Advisor will report the activity to the TraiNet system for USAID reporting. The TraiNet reporting will include the activity objective, number of persons trained by gender, and cost information. Currently, the EPP has the Capacity Building Advisor and Coordinator as the designated R1s for the PKXAEI and Coordinator as the designated R2.

Within 6 months, the Capacity Building Team will reach out the participants trained for a 6-Month Follow-Up Evaluation. All records managed by the Capacity Building Advisor will be kept in hard and soft copy and capacity building figures will be reported in the monthly, quarterly, and annual reports. Additionally, the Capacity Building team will notify the PakInfo team of update training figures in unison with the TraiNet reporting.

- **Communications Team:** The Communications Team will be responsible for compliant branding and marking of all training related materials and coordinating with the Capacity Building Advisor to generate press before and/or after the training activity. The Communications Team will review the following materials at least two weeks prior to the training for compliance:
 - Signs, pop-up Banners, Table Runners, Podium Signs
 - Presentations, PowerPoint Presentations, Hand-Out Materials
 - Agendas, sign-in sheets for each day of training, participant evaluations, etc.

Before and/or after the training activity, the Communications Team will work to deliver newspaper/blog segments, EPP Facebook page updates, website updates (if necessary), advertisements (if necessary), Success Stories, photos, and/or video of the training to send to USAID within 30 days of the training completion.

- **Finance & Procurement Team:** The Finance and Procurement Team is responsible for monitoring the costs of the training activity and working with the Quality Control Manager to make sure costs of the training are compliant and reported within 10 days of the completion of the training to the Capacity Building Team. The Project Manager and Component Director must have all trainer subcontracts (if the trainer will not be an EPP staff member) approved by USAID

and Chief of Party before the training design process. The Procurement team will make sure that all venues, subcontractors, and/or purchase orders are completed in a compliant manner. When reporting for final costs, the Finance and Procurement Team will report costs according to the template outlines in **Annex IV: Training Cost Information** for TraiNet compliance.

- **Security Team:** The Security Team is responsible for reviewing the final *Training Request Form* for security concerns and confirming logistics are compliant with the EPP Security Plan. The Security Team will be consulted for all trainings, including in-country, to make sure the participants, staff, and subcontracted staff will be able to safely train. The *Participant Training Activity Design Questionnaire* will detail the number of participants, participant origin and organization, location of the training, outside trainers/staff required, IT risks, transportation needs, and subcontractor involvement. The Capacity Building Advisor will review the Training Request Form with the Security Director and the Security Director will ultimately determine if the location, dates/times, and transportation arrangements are approved for security clearance. The Security Director reserves the right to cancel or reschedule trainings due to security threats at any point in the planning process. In the event a subcontracted training team provides their own security, their subcontract will be reviewed by the Security Director to confirm compliance and approve necessary measures/input.
- **Quality Control Manager:** The Quality Control Manager will oversee the entire participant training process to make sure that the overall EPP objectives are met and that the training is delivered effectively and within cost constraints. The Quality Control Manager will coordinate mostly with the Capacity Building Advisor and the Finance and Procurement Team and provide input on the Training Request Form.

ANNEX I: TRAINING REQUEST FORM

TRAINING REQUEST:			
ASSISTANCE OBJECTIVE:			
INTERMEDIATE RESULT:			
TRAINING DATES:	START		END

OVERVIEW AND BACKGROUND

This request is for the Energy Policy Program (EPP) to procure services, make all logistical arrangements and cover instructional, trainee, and travel costs for XX participants who will take part <Name of Program> training in <Location, Country> from <Start and End date>.

- Describe the current situation (In no more than 3 paragraphs)
- What gaps in knowledge, skills, practices, awareness and/or attitudes is this training meant to address?
- Provide background on USAID mission goals and ongoing or planned activities that the training will support
- Reference to any performance assessments or any baseline surveys conducted earlier.

OBJECTIVES

- Explain the main objectives of the training intervention. What specifically will participants be able to do, or do better, after the initial training?
- How does the specific training intervention address the Development Objective Goal?

TRAINING COMPONENTS

Describe the different types of activities of the intended training intervention, such as specific meetings, visits, observations, sessions, simulators, class room, on-the-job, etc.

INTENDED RESULTS

- What are the anticipated measureable results of this training? Within several months of training, what signs or indicators can be sought to show that training had its intended impact?
- How will the trainees apply the new KSA?

PARTICIPANT DETAILS

Selection Criteria

Explain the specific selection criteria and process of selecting participants that will be used. (See attached Participant Eligibility and Selection sample)

Desired Participant Profile

Please explain the background/profile of the selected candidates.

Recommended Participants

Names, titles/positions, organizations, place, city, province, No Objection Certificate requirement (if required)

Gender Breakdown

Males:

Females:

Contract requires 50/50 male-female participation or 30/70 accompanied by an attached justification memorandum

PARTICIPANTS WITH DISABILITIES

Are there any participants with disabilities taking part in the training program? If yes, specify any special equipment/aid requirement for the participant/s during travel and/or training:

LANGUAGE/INTERPRETATION

Language of instruction

Is interpretation required for this event of any participant?

MANAGEMENT

Type of Training	Short Term, Long Term, off-the-shelf, workshop, etc. (select one)
Training Venue	U.S. Training, 3 rd Country, In-Country (select one)
Training Provider	If known, training provider, suggested training provider, providers to receive RFPs (short list) (select one) Background supporting information for known or suggested providers (sole source)
Duration of Training (including travel days)	
Program Dates	Start and End dates (if known)

LOGISTICS

Explain how logistics will be handled for this training.

ACTION PLANNING

Action planning is a required element of this training that represents the synthesis of information, knowledge and skills acquired during training. The action plan shows steps participants intend to take in order to use what they have learned and discussed during training and address performance gaps. Action planning will begin with participants and their organizations as soon as selection is complete. The participants should be frequently reminded during training to consider new ideas and discussions in the context of their action plan(s). At the end of the program, there should be a facilitated action planning session and participants should prepare a written action plan (or strong draft) intended for implementation in Pakistan.

POST-TRAINING ACTIVITIES

- Debriefing on return
- Monitoring and evaluation of all participants and continued interaction with their organizations
- Post-training meetings/progress tracking of participants
- Alumni network
- Communications success stories

FUNDING AND COST ESTIMATES

Every effort will be made to obtain a reasonable cost for training interventions, as per the USAID regulations, while achieving the objectives of the intervention.

TYPE	AMOUNT	DESCRIPTION
ESTIMATED COST PER TRAINEE		\$
Instructional Cost		
Trainee Cost		
Travel Cost		
Cost Share		
Program Cost		

Administrative Cost		
Total Cost		

FUNDING SOURCE

Mention which USAID Direct Office if funding the activity

ATTACHMENTS

1. Trainer/Consultant Resumes (If Applicable)
2. Sole source justification memo (If Applicable)
3. Training Outline (For off the shelf courses) (If Applicable)
4. Gender Justification Memo (If Applicable)

Submitted for USAID Approval on: XX

ANNEX II: TRAINING REQUIRED DOCUMENTATION TEMPLATES

Sign-In Sheet (1 for each day of training, signed each day)

Participant Evaluation (1 for each present participant)

Final Agenda



USAID
FROM THE AMERICAN PEOPLE

ATTENDANCE SIGNING SHEET

TITLE OF THE TRAINING

DATE

				Pre-Lunch			Post-Lunch		
S.N o	Name	Title	Organization	Time in	Time out	Initials	Time In	Time Out	Initials
1									
2									
3									
4									
5									
6									
7									
8									



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XXX Name of Training
Participant Training Program

Training dates: **XXXXXXXX**

Post-Training Evaluation

Name of Participant: _____

Evaluation Feedback

Please tick in appropriate box: *5 outstanding, 4 very good, 3 satisfactory, 2 needs improvement, 1 did not meet expectations*

I. Program Rating	1	2	3	4	5
Relevance to your organization's work area	<input type="checkbox"/>				
Relevance to your work within the organization	<input type="checkbox"/>				
Structure of the program	<input type="checkbox"/>				
Topics covered in the program	<input type="checkbox"/>				
Quality of class room interactions	<input type="checkbox"/>				
Quality of training and reading materials	<input type="checkbox"/>				
Appropriateness of reading materials	<input type="checkbox"/>				
Quality of Speakers/Trainers	<input type="checkbox"/>				
II. Program Content and Trainers	1	2	3	4	5
Training Content & Relevance	<input type="checkbox"/>				
Trainer/Speaker Effectiveness	<input type="checkbox"/>				

Please share any other observations or comments regarding the trainer/training program/logistics:

Program Impact

Before you received this training, how would you describe your knowledge of INSERT THEMES HERE?

What specific skills did you gain as a result of this training?

In the future, how will you apply what you have learned? Please detail how you will leverage and deploy any knowledge you have gained.

How will your organization benefit from the NAME OF TRAINING PROGRAM training in both the short-term and long-term?

What was missing in the NAME OF TRAINING PROGRAM Training?

Do you have any suggestions for how we could improve future NAME OF TRAINING PROGRAM trainings?

The Energy Policy Program (EPP) is dedicated to improving and building capacity in public-sector entities by introducing best practice-driven systems. Answering these questions will help EPP improve the implementation of future trainings. Thank you for your support.



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<LOGO OF PARTNER>

ENERGY POLICY PROGRAM

AGENDA NAME OF ACTIVITY

Date(s): XX

Venue: XX

Time: XX

Time	Topic	Speaker
BREAK		
Time	Topic	Speaker

ANNEX III: TRAINING ACTIVITY TIMELINES

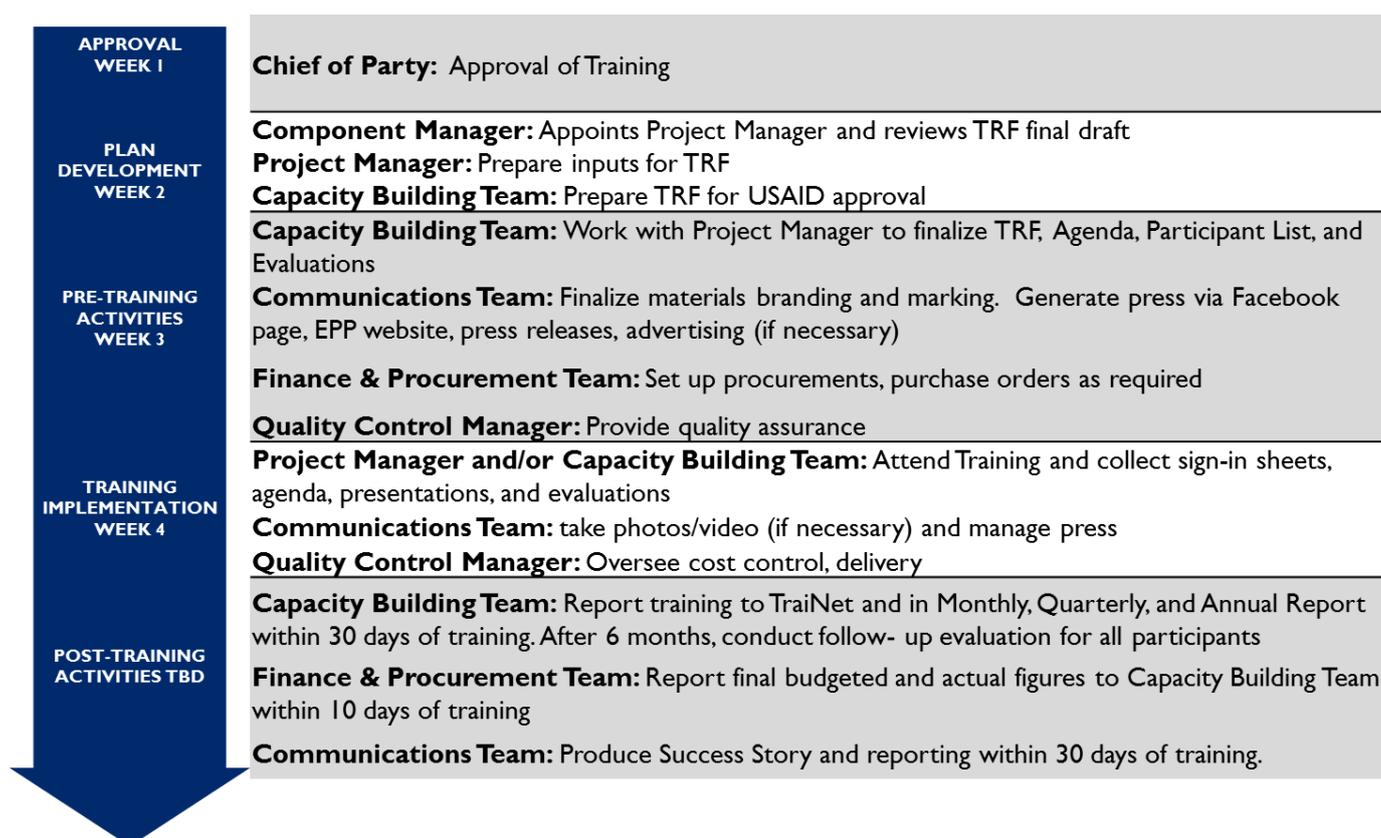
Depending on the type of the training activity and location, the timeline for completion of the training process will vary.

IN-COUNTRY TRAINING

In-Country training activities include all trainings taking place in Pakistan with USAID funding through the EPP contract. In-Country trainings require approximately 4 weeks from concept to execution for a workshop, seminar, or on-the-job training activity. For a larger training activity such as a conference or multi-week training program, the timeline should be expanded to allow for competition for venue options, service options, and/or transportation and lodging expenses.

All EPP training activities taking place in Pakistan are subject to the **ADS 253.4 In-Country Training Requirement** rules and regulations. Please see Figure 2 for a procedure flow for in-country training.

Figure 2: In-Country and Third Country Training Procedure.



THIRD COUNTRY TRAINING

Similar to the In-Country training activities, the third country training activities will fall under the same timeline as in-country activities depending on location to account for visa issues. All third country training activities are subject to the regulations under the ADS 253.3.5. EPP anticipates minimal third country training opportunities; however, in May 2013, a conference tour for four participants took place in Johannesburg, South Africa to improve operations and maintenance skills

for WAPDA staff. Moving forward, the EPP does not foresee third country training activities for the FY2014 and will focus on U.S. based training for out-of-country activities. Please see Figure 2 for a procedure flow of third country training.

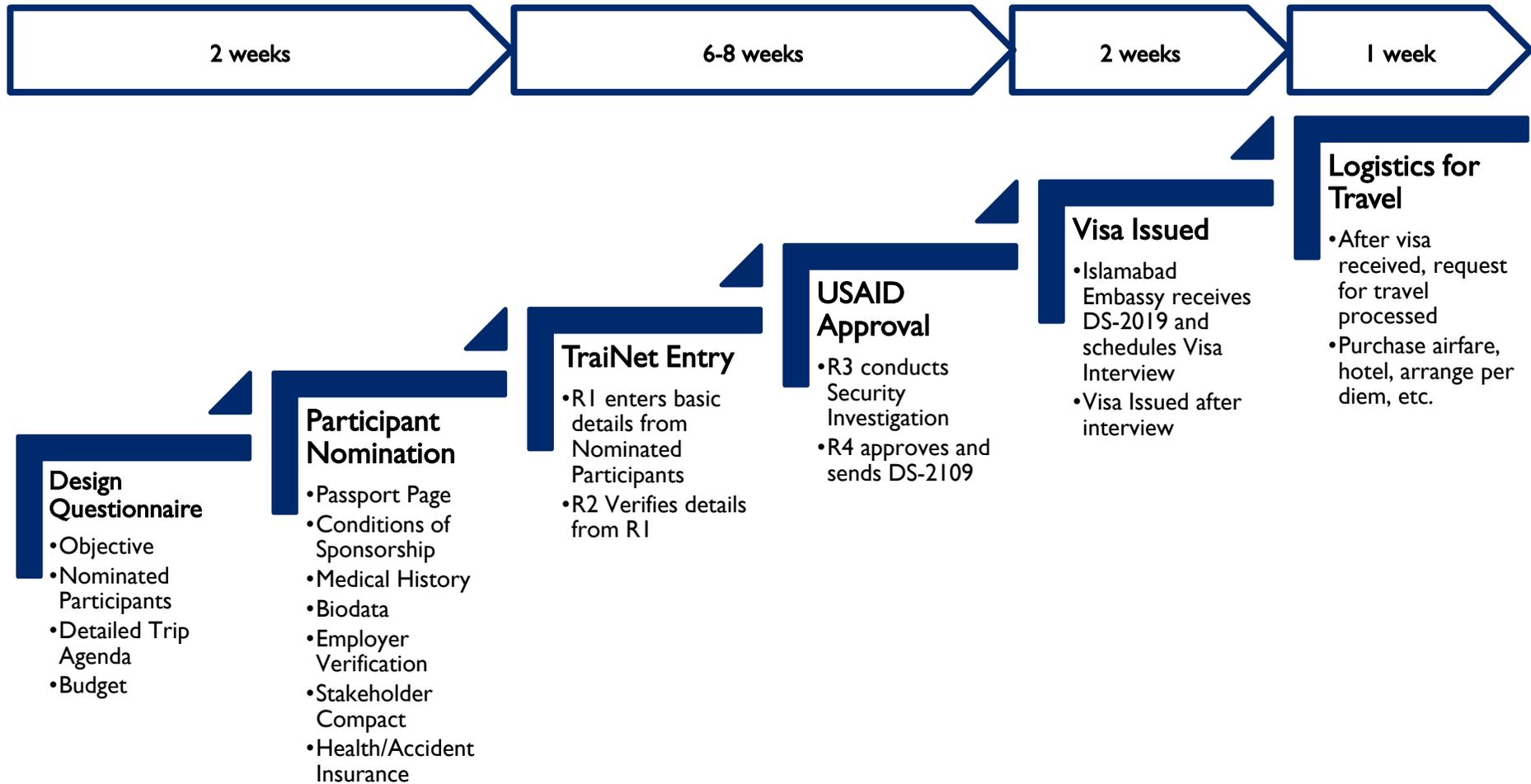
U.S. BASED TRAINING

When developing a U.S. Based training program, EPP must follow the rules and regulations set forth by the **ADS 252 Visa Compliance for Exchange Visitors** and **ADS 253 Participant Training for Capacity Development** (most updated version available on Trainet site). **Annex VI: Exchange Visitor J-I Visa Packet** includes rules, regulations, and documentation required for U.S. Based travel under the EPP program.

Both the project manager and Component Director will contact the Capacity Building Advisor for a brief on compliance related materials, timeline, logistics, and approvals. For any U.S. based training receiving funding from EPP, the participants must travel on a J-I visa to the United States. If the nominated participants have a B-I or tourist visa to the U.S. already, they must go through the J-I visa process as their travel is sponsored by USAID and can only travel on a non-J-I if they meet specific criteria to be exempt from the requirement by the Mission Director.

While the J-I visa process is timely (6-8 weeks for processing) the set up for a study tour can often take longer with the preparation of documentation before visa processing, arrangements for logistics for the U.S. training, and post-training paperwork. The following graphic details the timeline for J-I Visa application process through EPP.

Figure 3: J-1 Visa Processing Timeline



ANNEX IV: TRAINING COST INFORMATION

Per the information required by TraiNet, each training activity under EPP will be reported by the following cost elements:

Table I: TraiNet Cost Reporting

ELEMENT	DESCRIPTION
Instruction Expenses	Instruction expenses include those costs directly incurred to convey knowledge or impart training, such as: <ul style="list-style-type: none"> • Books, equipment, supplies, course handouts; • Seminar/Conference/Workshop registration fees or venue costs; • Published academic tuition and fees
Budgeted Amount (in USD):	
Actual Amount (in USD):	
Participant Expenses	Participant expenses include those costs directly incurred to meet the personal needs and Program requirements of the individual Participant, such as: <ul style="list-style-type: none"> • Per diem, medical examinations, visa fees; • Health and accident insurance premium; • Federal, state and local income taxes.
Budgeted Amount (in USD):	
Actual Amount (in USD):	
Travel Expenses	Travel expenses include those costs directly incurred transporting the Participant from the home country to the training country and back, as well as costs related to travel within the training country.
Budgeted Amount (in USD):	
Actual Amount (in USD):	

ANNEX V: PARTICIPANT SELECTION CRITERIA

Full Name	
Title/Designation	
Organization/Office or Unit	
Citizenship(s)	
Email	
Highest Level of Formal Education Achieved and Name of Institution	

Custom Criteria:

How many years have you worked with your current organization?	
Are you scheduled to leave your current organization within the next 3 years?	
Are you willing to take a medical physical and submit results to USAID contractor to determine eligibility?	
Are you willing to take an English proficiency exam and submit results to USAID contractor to determine eligibility?	
Do you possess prerequisite academic or other skills/experience that will enable you to successfully complete the training?	
How will your organization benefit from sending you to represent them on the training activity?	

ANNEX VI: EXCHANGE VISITOR J-I VISA PACKET

J-I VISA CHECKLIST

USAID REQUIRED DOCUMENTATION

- Participant/Exchange Visitor Biographical data Form
- Conditions of Sponsorship for U.S.-Based Activities Form
- Medical Examination and Certification Form
- Narcotics Offenses and Drug Trafficking
- No Objection Certificate

CHECKLIST OF DOCUMENTATION

- Participant/Exchange Visitor Biographical Data Form – AID FORM I 380-I
- Copy of Passport face page
 - More than 6 months left before expiration
- Conditions of Sponsorship for U.S.-Based Activities Form – AID FORM I 381-6
- Health and Accident Insurance Enrollment Questionnaire
- Medical Examination and Certification Form- AID FORM I 382-I
 - Doctor's signature and credentials from Approved Medical Facilities
- Stakeholder Compact
- Narcotics Offenses and Drug Trafficking
- No Objection Certificate

United States Agency for International Development – Pakistan Mission
American Embassy
RAMNA 5, Diplomatic Enclave
Islamabad, Pakistan