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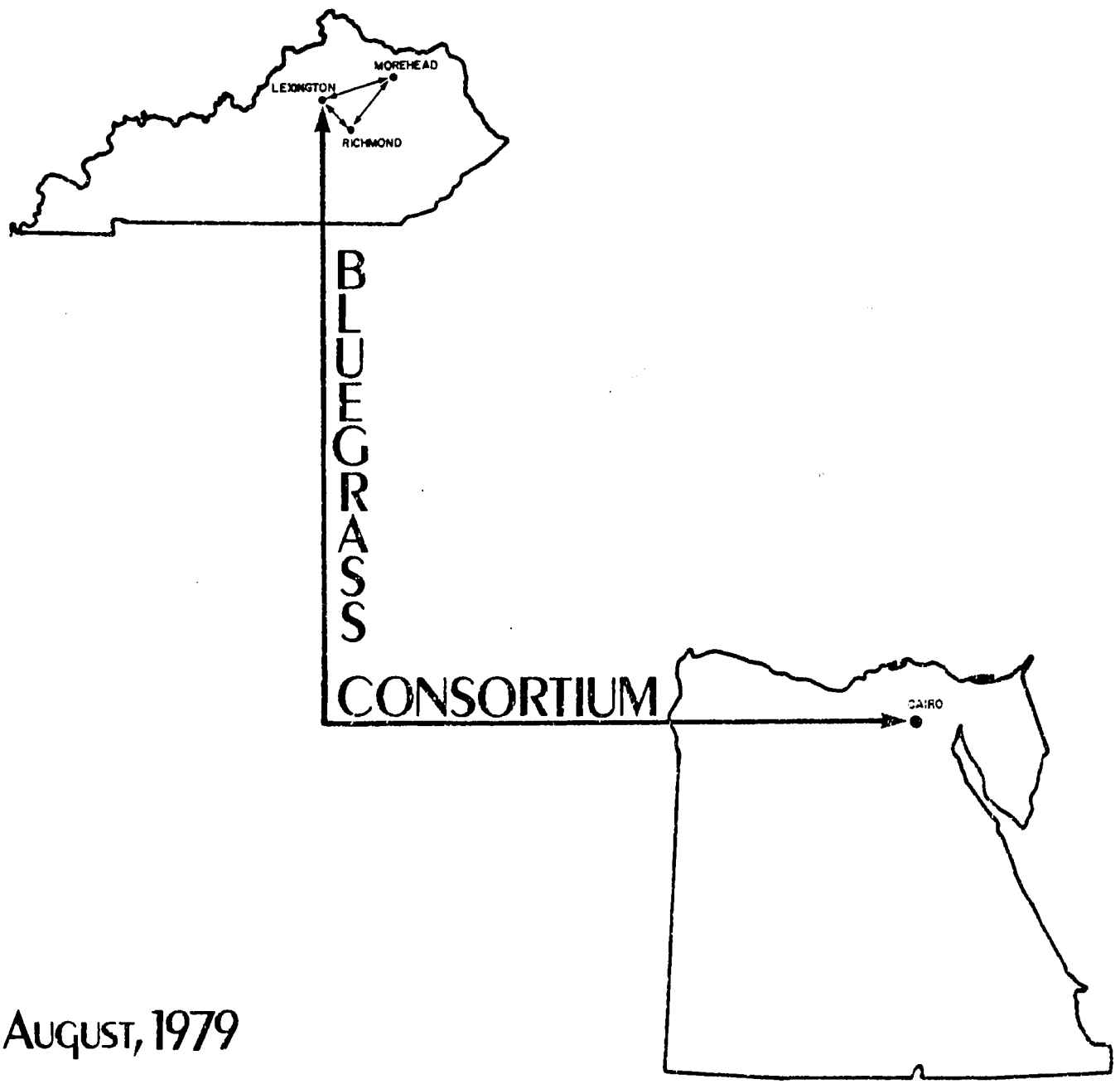
ORDEV

LOCAL DEVELOPMENT FUND TRAINING PROGRAM



AUGUST, 1979

EG-AAA-JYL

Preface

The Bluegrass Consortium was formed in January, 1979, to design a training program for employees of the Organization for Reconstruction and Development of Egyptian Villages, (ORDEV) an agency of the Arab Republic of Egypt. The Consortium consists of Eastern Kentucky University, Morehead State University, and the Bluegrass Area Development District, the lead agency. Each member is qualified through both staff and experience, to provide the academic and field training for employees of ORDEV who will be involved in the training, implementation and operation of the Local Development Fund as outlined by the USAID project paper, "Development Decentralization I" (See Report Three, Section III).

In February, 1979 a contract between the Bluegrass Area Development District and the Cairo Mission of the U.S. Agency for International Development was signed. This contract provided for the design and development of the Consortium training program for ORDEV employees in four "job goal" categories: Loan Officer, Industrial Development Officer, Financial and Accounting Officer, and Local Government/Citizen Participation Officer.

After presentation of the draft training program to officials of USAID and ORDEV in Cairo during the early part of August, 1979, the basic job goal approach was changed from that originally provided in the "Development Decentralization I" project paper. The training program was subsequently changed to eliminate and replace the four specialist job goals with a generalist job goal category (General Development Officer). This position will embrace the principles involved in the original specialist training but will necessarily provide a less "in-depth" exposure to trainee/participants in the program.

The ORDEV Local Development Fund Training Program consists of four separate reports:

1. Academic Training - Eastern Kentucky University
2. Academic Training - Morehead State University
3. Field Training - Bluegrass Area Development District
4. Consortium Management - Bluegrass Area Development District

The dual program training approach to be employed by the Consortium is one which will provide an academic base for the General Development Officer supplemented by an intensive field training program that will expose the trainee/participants to the implementation of their acquired academic skills. With the "dual program" approach, the Consortium will provide the necessary training within the seven month time frame allotted by USAID for this training. The dual program approach to the training provides:

1. college level academic instruction needed to form the educational background necessary to function in the job goal; and

2. actual case study experience needed to understand the human, technical and organizational aspects of community and economic development programs.

The four reports describe the approach and methodology that comprise the ORDEV Local Development Fund Training Program; they are, therefore, interdependent. The reports provide a five year program designed to meet certain training needs of ORDEV in the implementation of the Local Development Fund. After completion of the program, the participants will have developed the educational and experiential framework to both train other employees at the ORDEV Academy in Cairo and function in the job goal classification for which they were trained.

This report is a product of the staff and faculty of the Bluegrass Consortium members. Recognition is given to the principle writers of the reports:

Report One	J. Allen Singleton, Ph.D. Eastern Kentucky University
Report Two	Joe B. Copeland, Ph.D. Morehead State University
Reports Three and Four	Neil Hansen Bluegrass Area Development District

Special recognition is given to Darrell R. Gilliam, Bluegrass Area Development District, without whom the coordination of the component parts of the reports would not exist.

Bluegrass Consortium
Lexington, Kentucky
September 21, 1979

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Bluegrass Consortium
Report One
ORDEV Training Program
Academic Training
Eastern Kentucky University
May, 1979

The following is a statement which describes Eastern Kentucky University's perception of its role in the Bluegrass Consortium.

Eastern has been specifically involved in the training of persons for service in the public sector since 1970.

We have prepared for presentation to the trainees six separate training packages, one for each of the following areas:

1 aa. Training Needs, Facilities Assessment, Curricula and Evaluation (60)
2 bb. Project Identification and Analysis (60)
3 ff. Information Flow and Data Management (40)
4 gg. Local Participation (40)
5 hh. Evaluation and Research (40)
6 ii. Appropriate Production and Marketing Systems/Skills (40)

The estimated amount of class contact hours based on semester equivalents is indicated in parenthesis.

Each of these units is viewed as a free-standing training package. The basic format of each unit would be designed in a flexible workshop arrangement. The EKU faculty/staff are of the opinion that a non-traditional approach to the providing of this training effort would offer the most viable means of meeting the potential diversity among the practitioners who would be receiving this training.

Successful implementation of a training program of this nature is dependent on a variety of elements. Among the obvious needs are:

1. A core of top quality faculty personnel accustomed to interacting with in-career practitioners.
2. Adequate physical facilities for the conducting of training sessions.
3. Accessible modern service facilities, (for example, computer facilities; audio-visual equipment including video tape facilities, library resources and other support facilities).
4. An adequate administrative structure to insure the implementation and completion of a complex non-traditional training package.

Eastern Kentucky University is adequately prepared in each of these areas. In addition to traditional academic programs such as the Masters of Public Administration and the Masters of Business Administration, we are experienced in the training of in-career practitioners. We have an excellent educational plant. We participate in the Kentucky Educational Computer Network which gives us access to an IBM 370/169 and an upgraded PDP 11/70 system. In addition, we have a number of mini/micro computers at various locations on campus and participate in the OCLC data retrival system. The University has been a leader in the video-production area within Kentucky and has outstanding audio/visual resources. The administrative structure for this program would be designed to maximize the coordination and execution of the program both internally and in conjunction with the other consortium members. Specifically the program would be organized with two key EKU personnel.

First there would be an ACADEMIC DIRECTOR who would act as the chief administrative control agent for the program. The AD would also act as liaison person with the BGADD staff person and other non-EKU persons involved in the on-going project. He will also be interacting with prospective faculty and specialists in each of training areas to provide the maximum effective package possible to meet the needs of the trainees. This person would be Dr. J. Allen Singleton, Professor and Chairperson of the Political Science Department (which houses the Masters of Public Administration Program). He is also the director of the Institute of Government, the technical services component of the Political Science Department. He has served as project director for projects funded by federal, state, local and private agencies. He will spend one-eighth of his time in activities related to the program. In addition to the activities defined above he will be involved in curriculum development activities.

The second person would be a SPECIAL PROGRAMS COORDINATOR. This person would be responsible for such matters as facilities coordination and providing the accessibility of needed instructional equipment. Since the format for EKU's involvement in this program utilizes the workshop/special events format, it is essential to have a person from the continuing education unit of the University to work with the Academic Director and instructional staff in providing the necessary space and equipment for the smooth operation of the program. The Special Programs unit of the University also houses the International Student Advisor office and is involved with the University's on-going English as a Second Language program. (See Appendix A). This second person, who will be devoting one-fourth time to the project, will also be directing and co-ordinating the work activities of a clerk/typist who will be assigned responsibilities with the project. Duties of this person involve the preparation and reproduction of course materials and processing the necessary correspondence and record keeping associated with the project. In addition to these personnel, a single, qualified specially designated instructor will maintain each of the six courses at delivery level so that new curriculum developments, feedback from students, requests from representatives of the lead agency or ORDEV can be effectively integrated into the on-going course offerings. Other annual maintenance costs are detailed in the proposed maintenance budget.

Description of Courses

aa. Training Needs, Facilities Assessment, Curricula and Evaluation
bb. Project Identification and Analysis
ff. Information Flow and Data Management
gg. Local Participation
hh. Evaluation and Research
ii. Appropriate Production and Marketing Systems/Skills

Training Needs, Facilities Assessment, Methods, Curricula, and Evaluation

Course Coordinator: Academic Director

1. CURRICULUM CONTENT AND COURSE RELEVANCY

This course is designed as an intensive introduction to techniques of planning and implementation of training packages through emphasis will be on delivery of training in field conditions and the coordination of these activities.

The courses consist of 60 contact hours allocated among 6 specific areas of training. The major emphasis is upon training methods, facilities appraisal and coordination. It is EKU's perception that this course will be particularly subject to constant refinement in terms of input and feedback from other actors in the consortium, participants, and the contracting agency.

Although a variety of course related materials is available and will be used, most course materials must be specifically structured in anticipation of the specific persons who will be enrolled in this course. The Academic Director will be responsible for the coordination for this course.

COURSE TIMING

The course required 60 contact hours over a three-month period.

CURRICULUM CONTENT AND COURSE RELEVANCY

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
I	1. Overview of the Training Function a. Theories of Management Training b. Identify Training Costs c. Developing Training Records and Information Systems	4	
II	1. Assessing Training Needs a. Identification of Programmatic Goals b. Identification of Trainee Goals c. Bridging Expectations and Resources	6	
III	1. Training Methods & Techniques a. Classroom Instruction and Materials b. Field Training c. Programmed Instruction d. Gaming and Simulations e. Audio/Visual Materials f. Selection of Training Materials g. Innovative Approaches to Training	24	
IV	1. Training Facilities Appraisal and Coordination a. Physical/Environmental Aspects of the Learning Process b. Equipment	12	

CURRICULUM CONTENT AND COURSE RELEVANCY

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
V.	1. Training Evaluation a. Non Quantative b. Quantative	8	
VI	1. Performance Appraisal a. Management by Objectives b. Cost Effectiveness c. Non-Traditional Approaches D. The Training Function as Policy Implementation	6	

PROJECT IDENTIFICATION AND ANALYSIS

Course Coordinator: Dr. Gerald Martin

1. CURRICULUM CONTENT AND COURSE RELEVANCY

The purpose of this course is to provide the knowledge, skills, and techniques needed to identify, design, analyze, implement, and monitor projects. Project identification and analysis permits a highly efficient utilization of resources in a cost-effective developmental program.

The course is organized around three general themes: (1) Project Identification Design; (2) Project Implementation and Management; and (3) Project Analysis.

In Project Identification and Design, topics covered include the generation and screening of project ideas, market analysis, technical analysis, financial analysis, resource analysis, social profitability analysis, systems analysis, project funding and pay-back, risk considerations, and the long-term financial stability of the project. Case studies will be used for learning integration and application.

Project Implementation and Management deals with the problems of program start-up, developing the management team, project management, project controls, MBO, PERT, CPM, PPBS, land use problems, and special problems in agribusiness.

Training in Project Analysis is designed to provide the basic economic, statistical, and analytical skills necessary to measure cost-effectiveness and cost/benefit analysis. Participants will gain experience in the application of these theoretical concepts to "real world" situations. Each participant will present a case problem or a sample proposal, including a plan of action consistent with the cost/benefit analysis approach.

Finally, all these skills will be integrated into a single practical application of cost-benefit, feasibility analysis to a new venture to be developed by the participants.

COURSE TIMING

The course requires 60 contact hours over a three-month period.

RELATIONSHIP OF COURSE TO JOBS OF PARTICIPANTS The course content will be of particular value in assisting the generalist working with other local development actors. For example, skills will include:

1. Preparation of data and information needed for loan applications.
2. Design and analysis of projects.
3. How to present advice and assistance on implementing projects.
4. Monitoring progress of construction and operational phases of programs.
5. Business management practice.
6. Establishing short and long-term data systems.
7. Evaluation methodology and application.

8. Project management and monitoring systems.
9. Identification of profitable projects.
10. Application of analytical and management tools, such PERT, critical path networking, cost-benefit analysis, present value and discounted cash flow.
11. General management skills.

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
I	1. Generating and Screening Venture Ideas a. Product or Service Selection b. Identifying a Need c. Preliminary Screening d. Pre-Feasibility Study	1	Martin
II	1. Environmental Scanning a. Economic Analysis b. Marketing Analysis 2. Forecasting 3. Resource Analysis 4. Determination of Comparative Advantages	4	Thakur
III	1. Determination of Project Scope and Objectives a. Scio-Economic Purposes b. Overall Long-Range Objectives c. Short-Range Goals d. General Policies	4	King
IV	1. Project Analysis 2. Financial Analysis 3. (Hypothetical) Core Study	10	Ahmed Martin
V	1. Implementing and Monitoring the Project 2. Special Problems in Land Use 3. Special Problems in Agribusiness	10	Wagner Bodley Ahmed
VI	1. The Fundamental Economic Concepts for Cost-Benefit Analysis	4	Alford Lin
VII	1. Techniques Used in Moving Toward Cost Effectiveness in Resource Allocation	3	Griffin

PROJECT IDENTIFICATION AND ANALYSIS

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
V	1. Implementing and Monitoring the Project 2. Special Problems in Land Use 3. Special Problems in Agribusiness	10	Wagner Bodley Ahmed
VI	1. The Fundamental Economic Concepts for Cost-Benefit Analysis	4	Alford Lin
VII	1. Techniques Used in Moving Toward Cost Effectiveness in Resource Allocation	3	Griffin
VIII	1. Basic Statistical Concepts Needed to Conduct Cost-Benefit Analysis a. Basic Sampling Theory b. Frequently Used Sampling Techniques c. Developing A Questionnaire d. Interview Techniques e. Tabular and Grapic Analysis f. Understanding the Measures of Central Tendency g. Measures of Dispersion h. Discussion of Basic Probability Distributions i. Estimating Population Parameters and Developing the Probability Statement j. Basic Principles of Hypothesis Testing	4	Nickles

PROJECT IDENTIFICATION AND ANALYSIS

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
IX	1. Cost-Benefit Analysis In Action a. Role of the Public Sector in the Economy b. Estimating Demands and Evaluating Benefits c. Production and Costs in the Public Sector d. Prices, Charges and Subsidies in the Public Sector e. Discounting Benefits and Costs for Public Projects f. Multiple Objectives and Group Decisions in the Public Sector g. Cases Dealing with Cost-Benefit Analysis h. Participant Presentation of Cases Dealing with Cost-Benefit Analysis	8	Alford Lin
X	1. Origination of a New Venture a. Screening Products b. Conduct Prefeasibility Study c. Form Study Team d. Plan Format Study e. Conduct Market Analysis f. Conduct Technical Analysis g. Conduct Financial Analysis h. Conduct Social Profitability Analysis i. Conduct Cost Benefit Analysis 2. Prepare Investment Funding Proposal	12	Martin

3. READINGS

1. Brigham, Weston, Essentials of Managerial Finance, Dryden Press, 1979.
2. Clayton & Spivey, The Time Value of Money, W.B. Sanders Co., 1978.
3. Clifton & Fyffe, Project Feasibility Analysis.
4. Dasso, Ring & McFall, Fundamentals of Real Estate, Prentise-Hall, 1977.
5. Gass, Saul, Linear Programming, Fourth Edition.
6. Gettel, Ronald E., Real Estate Guideline and Rules of Thumb, McGraw-Hill, 1976.
7. Graaskamp, James A., A Guide to Feasibility Analysis, Society of Real Estate Appraisers, Chicago, 1970.
8. Hayes, William, Statistics for the Social Science, Holt Renholt & Winston.
9. Murdick & Ross, Information Systems for Modern Management.
10. Nigerian Capital Market, (Boston: Inter Collegiate Case Clearing House, 1978).
11. Notebook of U.N. Documents prepared by Class Leader.
12. Olson, Kent W. & Sharp, Ansel M., Public Finance, West Publishing, 1978.
13. Orokin Enterprises, Inc. (Boston: Inter Collegiate Case Clearing House, 1978).
14. Osteryonny, Jerome S., Financial Management, Self Correcting Problems, Grid, Inc., 1976.
15. Patters, Thomas H., OD: Emerging Dimension & Concepts, (A collection of papers) "OD, MBO & the reward system." pp. 9-28.
16. Ricks, International Dimensions of Corporate Finance.
17. Ronstadt, The Art of Case Analysis.
18. Steiner, George A., Top Management Planning, MacMillian Co., 1969.

4. BIOGRAPHICAL DETAILS OF INSTRUCTORS

Dr. Gerald Martin will be the coordinator for the course on Project Identification and Analysis. He received his B.S. degree from Clemson University and his M.B.A. and D.B.A. degrees from Arizona State University with fields of study in finance, statistics, and management. He has 12 years work experience, has been teaching for 9 years, and maintains an active consulting service for businesses and law firms. Dr. Martin has numerous publications, is an active participant in several professional organizations, and is coordinator of the Finance program at Eastern Kentucky University.

Dr. Mesbah U. Ahmed received his Masters and Ph.D. in Industrial Engineering, with specialization in operations research, applied statistics and agricultural economics from Texas Tech University. He is an active member in various interdisciplinary professional associations, and has presented and published numerous research papers.

Professor James Alford received a B.S. in Commerce and an M.B.A. from the University of Kentucky. He has 14 years teaching experience, the last ten at Eastern Kentucky University, was Director of ACcounts for the Kentucky Department of Finance for three years and Supervisor of Accounts for the Kentucky Department of Revenue for five years. His area of teaching specialty is in public finance.

Professor Donald E. Bodley is Chairholder for Real Estate Studies and Professor of Real Estate. He has had 17 years of teaching experience in colleges and universities. He is widely known throughout the nation as an authority in the development, promotion, management and marketing of multi-family housing units. Professor Bodley has spent 12 years in the business world both as Vice President for Marketing of Multicon, a multi-family housing developer, and as President of Bodley Associates, a real estate development consulting firm. He has published widely in professional and trade journals in the real estate field.

Dr. Barry Griffin's previous work experience includes 8 years of management consulting, most of which concerns health-related projects. He has the position of Director of Statistical Analysis at Minnesota Systems Research, an organization with broad-based experience in the development and application of planning, management, and evaluation methods for human service delivery systems. Before joining the faculty at Eastern Kentucky University, Dr. Griffin directed a project which assessed the impact of Minnesota's medical assistance reimbursement methodology on nursing homes' average income. His current interests include project evaluation methodologies and the detection of erroneously reported statistics.

Dr. M. Stan King received his Bachelor of Business Administration and Master of Science degrees in Business and Economics from Texas A&I University. His Doctor of Business Administration degree is from Mississippi State University with concentrations in Management, Marketing, Economics, and Quantitative Analysis. In addition to fourteen years teaching experience and twenty different course preparations, Dr. King has eight years industrial experience in field marketing and personnel administration. He has planned, coordinated or served as a program leader in more than one hundred seminars and conferences and currently is the Director of the Management Development and Studies Institute at Eastern Kentucky University.

Dr. Engming Lin received his Ph.D., 1971, Texas Tech University; Major areas of study: Quantitative Analysis, Production & Operations Management; eight years of teaching experience in Statistics, Production Management, and Quantitative Analysis; Business experience include Statistical Quality Control and Experiental Design; four years of business consulting mostly with small businesses.

Dr. Lonnie J. Nickles received his BA degree in Economics at the University of Arkansas, his MA and Ph.D. degrees in Economics from the University of Missouri, Columbia. Dr. Nickles has served on the faculty of Management Science at the University of South Carolina, Dean of the College of Business at Houston Baptist University, and Professor of Business Administration at Eastern Kentucky University. He has published in several academic journals in the fields of economics, information systems, and management science. He has served as consultant to Virginia State College, several businesses, and The Governors Council of Traffic Safety - State of Texas. He has worked under federal, state, and local grants and is currently serving as coordinator of the Electronic Data Processing program at Eastern Kentucky University.

Dr. Manab Thakur has extensive research experience in various parts of the world including Europe, Middle East and the Far East. His research interests include Comparative Management, Organization Development, Equal Opportunity, Managerial Compensation, and other areas of management. He has to his credit ten publications and has led executive seminars and training programs in different parts of the world.

Dr. Thakur's current research projects are in Comparative Management, Managerial Compensation and Organization Development. His Ph.D. thesis deals with Comparative Management and the application of the concept of Organization Development in different areas of personnel, training, and management.

Dr. Kenneth Wagner has completed academic preparation in the areas of science, business and post-secondary education. His industrial background includes employment in marketing and marketing support organizations as well as production technology and project planning. His experience includes industrial positions in such industries as computer manufacturers, the automobile industry, and industrial production shops.

INFORMATION FLOW AND DATA MANAGEMENT

Course Coordinator: Dr. J. Allen Singleton

1. CURRICULUM CONTENT AND COURSE RELEVANCY

The development of effective information flow from fluid data bases is a constant in most public systems regardless of the hardware available to accomplish the task. This unit is designed to pose basic information theory and communication theory in a public service matrix, from the practitioner's, the policy makers and program recipient perspectives. Trainees will be involved in lectures and exercises designed to describe elements or provide exposure to a variety of topics.

COURSE TIMING

The course requires 40 contact hours over a three-month period.

RELATIONSHIP OF COURSE TO JOBS OF PARTICIPANTS

The course will provide experience in structuring and managing records for retrieval analysis reporting of base line data. Emphasis will be on methods of streamlining data sources, deciding what bits of data are essential and how to develop informational networks which can assess and communicate pertinent bits of information. This course is particularly applicable to general managers. Course assignments and illustration would be emphasized which relate to the specific activities of the agency in coordinating, supervising and maintaining agency functions.

INFORMATION FLOW AND DATA ANALYSIS

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
I	1. Communication Theory 1. Interpersonal Communications 2. System Theory Concepts	4	
II	1. Information Theory 1. Types of Information Systems 2. Determination of System Requirements	3	
III	1. Information Content 1. Records Management (4) a. design b. validity c. replicability d. organization e. integrity 2. Data Elements and Building A Data Base (3) a. identification of data items b. codes and code structures c. accessibility of stored data d. reorganizing existing data	7	

INFORMATION FLOW AND DATA ANALYSIS

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
IV	1. Reliability and Availability of Data 1. Types of Data Manipulation 2. Distribution and Tabulations 3. Summariziing Distributions 4. Elementary Probability Theory 5. Relationship Between Variables 6. Use of Samples	6	
V	1. Alternative Data Sources 1. Controlled Data 2. Data from Inferential Sources 3. Unobtrusive Measures	5	
VI	Communications Nets	3	
VII	1. Management Information Systems 1. Financial System 2. Operation System 3. Facilities System 4. Personnel System 5. Administrative System	3	

INFORMATION FLOW AND DATA ANALYSIS

Course Outline

WEEK	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTIONS	...
VIII	PERT-CPM as Applied to Information Flow	3		
IX	Q-Sort Theory in Information Flow	2		
X	1. Organizing Information for Presentation 1. Graphics 2. Charts 3. Models 4. Simulations 5. Multi-media Presentations	4		

3. READINGS

1. Byrd, J., Operations Research for Public Administrators, Lexington Book
2. SRA, Systems Analysis, Science Research Associates
3. Martin, Principles of Data-Base Management, Prentic-Hall
4. Barnlund, Interpersonal Communications, Houghton Mifflin 2nd ed.
5. Berleson & Steiner, Human Behavior
6. Webb et al, Unobtrusive Measures, Rand McNally
7. Vetter, Language Behavior and Communication, Peacock

It should be noted that much of the available material related to the course is from a variety of periodicals.

COURSE DIRECTOR

J. Allen Singleton will be the person responsible for coordinating this unit. This responsibility will be in addition to that of Academic Director. One of Dr. Singleton's areas of concentration is in data management and analysis. In addition to teaching courses at the graduate and undergraduate level in the subject matter area, he has participated in a number of NSF Institutes and NSF/AAAS short courses related to information flow, building data bases and research methods. He has also served as a consultant to private and public agencies at the local and state level relevant to this subject matter area.

CITIZEN PARTICIPATION

Course Coordinator: Dr. Janet Patton

1. CURRICULUM CONTENT AND COURSE RELEVANCY

Local participation is an essential part of planning and implementing effective development programs. The goal is to create a climate where elected and administrative officials and citizens can participate in designing programs to shape future development. Community involvement can enhance the development process by facilitating the two-way flow of information, helping to define goals and objectives, testing alternatives, and fostering public understanding and acceptance of governmental programs and policies. Success of development programs may depend on the ability of decision makers to gather the relevant information about public attitudes necessary to the adoption of plans programs and policies that are politically feasible, economically desirable and socially acceptable.

Knowledge of a number of subjects is helpful in preparing for local participation programs including:

- analysis of local political, social and citizen participation conditions.
- participation theory and strategies.
- capacity building and maintenance.
- goal formulation.
- impact assessment and needs assessment.
- information collection and analysis.
- communication processes.
- overcoming impediments to implementation of development objectives.
- resource identification and mobilization.
- integration of services and policies.
- intergovernmental coordination and cooperation.
- organizational development.
- institutional and personal linkages.
- team cooperation and coordination.
- preparation and implementation of plans which utilize the results of local government participation.

The course content will be designed to provide the conceptual framework and the technical and practical skills needed to design and implement participatory program.

COURSE TIMING

The course requires 40 contact hours over a three-month period.

RELATIONSHIP OF COURSE TO JOBS OF PARTICIPANTS

Local citizens participation is of significant concern. The course will include material specifically related to working with village councils and administrative staff, local data collection and analysis, and developing and implementing participatory action plans which overcome the problems and enhances the factors conducive to local development.

COURSE FORMAT

- lecture and discussion.
- simulation by class of the full range of participatory methods and techniques.
- individual and class projects to develop planning and implementation skills including defining of a problem+choosing+justifying techniques to deal with the problem.
- preparation for, attendance at and critical analysis of existing participatory programs in Kentucky.

CITIZEN PARTICIPATION

Course Outline

WEEK	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
I	1. Relationship of Participation to Community Development a. Philosophical and Theoretical considerations-end, means or both b. Capacity Building and Organizational Development c. The Relationship of Community Involvement to goal formulation, planning, and decision-making processes d. Identification of Variables Affecting the integration of participation and development administration	6	
II	1. The Egyptian Setting - Characteristics of a Rural Society and Culture That Effect Participation a. Identification and overcoming of obstacles and impediments to participation and community development b. Identification and strengthening of factors which are condusive to participation and community development	4	
III	1. Comparative Insights a. Examples and experiences of other countries such as the Panchayati Raj system in India	2	

CITIZEN PARTICIPATION

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
IV	1. Creating The Basis For Participation a. Analysis of local political, social and citizen participation conditions b. Overcoming obstacles to participation c. Leadership Identification and enhancement d. Constituency Building e. Motivation of groups and individuals f. Strengthening factors supportive of participation and development	4	
V	1. The Process of Participation A. Local Participation Strategies 1. participatory strategies and assessment of opportunities and potential liabilities 2. timing considerations for involving communities, leaders, interest groups and individuals 3. collection, analysis and utilization of public input 4. identification of the public concerned with or affected by the policies to be formulated	3	
	B. Group Dynamics, Human Relations and Communication 1. understanding how people behave in groups and how this behavior affects the communication process in meetings, hearings, workshops, interviews, etc.	3	

CITIZEN PARTICIPATION

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
V	1. The Process of Participation (Continued) B. 2. understanding the basic principles of human relations and situations which enchance or break down communications.		
	C. Involvement Techniques and Methods 1. assessment and evaluation of different techniques and methods including consultation, conferences, public meetings, hearings, advisory committees, commissions, and task forces, workshops, nominal group techniques, charette, delphi techniques, surveys, interviews, media usage, audio-visual aids and other involvement methods.	6	
	D. Facilitating Large and Small Group Meetings and workshops. 1. skills of leading or moderating meetings, hearings and workshops.	2	
	E. Conflict Resolution and Mitigation 1. understanding the nature and causes of conflict 2. recognizing potential conflict 3. skills and steps required to mediate or mitigate conflict. 4. factors that enhance consensus and compromise	2	

CITIZEN PARTICIPATION

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
V.	F. Resource Identification and Mobilization 1. identification of community, agency and individual resources available for development 2. estimation of costs and staff requirement of various involvement techniques	2	
	G. Intergovernmental Coordination 1. processes that facilitate or impede intergration of services 2. significance of institutional and personal linkages	2	
VI	1. Utilization and Evaluation of Participation A. development of criteria for evaluation of the effectiveness of participatory strategies B. creating an awareness of the tangible results of participation C. preparation and implementation of plans which utilize the results of local participation	4	

3. READINGS

1. Mayfield, J.B., Local Institutions and Egyptian Rural Development, research monograph, Cornell University Center for International Studies.
2. Esman, Milton J. "Deve-opment Administration and Constituency Organization" Public Administration Review, March/April 1978.
3. Broehl, Wayne G., Jr., The Village Entrepreneur, Harvard University Press, Cambridge, Mass. 1978.
4. Eldersveld, Jagannadham, Barnabas, The Citizen and Administrator in A Developing Democracy, Scott Foreman and Co., 1968.
5. Krebetz and Goodman, "Participation For What or For Whom" Journal of Comparative Administration, November 1973.
6. Cogan and Associates, Techniques of Public Involvement, Council of State Planning Agencies, Washington, D.C., 1977.
7. Additional material, illustrations and handouts prepared by Instructor.

4. Additional Bibliographical Material

Arnstein, Sherry R. "A Ladder of Citizen Participation" Journal of the American Institute of Planners Vol. 35 #4, July, 1969, pp. 216-224.

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Burke, Edmund, "Citizen Participation Strategies," Journal of the American Institute of Planners Vol 34, September, 1968, pp. 287-294.

Cogan & Associates, Techniques of Public Involvement, Council of State Planning Agencies, Washington, D.C., 1977.

Cunningham, James V., "Citizen Participation in Public Affairs" Public Administration Review Vol. 32, October, 1972, pp. 589-602.

Management Information Service Public Involvement in Local Government in the 1970's, International City Management Association Vol. 6 #1, Washington, D.C., 1974.

Montgomery, John, "The Populist Front in Rural Development" Public Administration Review, January/February 1979.

Montgomery & Esman, "Popular Participation in Development Administration" Journal of Comparative Administration, November 1971.

Mugulof, M. "Citizen Participation: The Local Perspective," the Urban Institute, Washington, D.C., 1970.

Rosenbaum, Nelson M., Citizen Involvement in Land Use Governance: Issues and Methods, Urban Land Institute, Washington, D.C., 1976.

Uphoff & Esman, Local Organization for Rural Development: Analysis of Asian Experience, Ithaca, N.Y., Cornell University Center for International Studies, 1974.

U.S. Department of Transportation, Federal Highway Administration, Effective Citizen Participation in Transportation Planning Vo. 1 Community Involvement Processes and Vol. 2 A Catalogue of Techniques, U.S. Government Printing Office.

Van Meter, Elena C., "Citizen Participation in the Policy Management Process" Public Administration Review Vol. 35, Special Issue December, 1975, pp. 804-812.

COURSE COORDINATOR

Dr. Janet W. Patton will assume primary responsibility for the local participation phase of the program. Dr. Patton has extensive teaching and research experience in local government, intergovernmental relations, and planning and citizen participation. Dr. Patton has an M.A. in Asian Studies including research study of India's Panchayati Raj program. Her Ph.D. dissertation analyzed the implementation of the Appalachian Regional Development Act of 1965 in West Virginia with emphasis on the creation of the local development districts.

In addition to her professional experience, Dr. Patton has served on numerous citizen and community advisory committees including the Governor Nisqually River Task Force, the Governor's Welfare Reform Task Force, the U.S. Army Corps of Engineers Urban Study Advisory Committee, the Georgetown Transportation Advisory Committee and the Tourism, Historical Reservation and Recreation Advisory Committee and the Steering Committee of the Areawide Action Plan of the Bluegrass Area Development District.

Most recently Dr. Patton has been field director for a joint - Eastern Kentucky University-Bluegrass Area Development District public education and community involvement program on public transportation alternatives for central Kentucky. A team of practitioners and consultants will be recruited to assist in teaching class sessions and advising student projects.

EVALUATION AND RESEARCH: INTRODUCTION

Course Coordinator: Dr. Mesbah U. Ahmed

1. CURRICULUM CONTENT AND COURSE RELEVANCY

Evaluation research is a process of applying systematic procedures to accumulate reliable and valid evidence on the manner and extent to which a specific project accomplishes its goals. At both the national and community levels, the application of social sciences and relevant interdisciplinary methodologies involved in evaluation research assists to identify the ideology, acceptability, cost effectiveness, feasibility and socioeconomic values of various programs. With the great necessity for more effective projects to meet the social needs confronting a nation or community, evaluation research is increasingly important as a source of knowledge and direction towards effective policy formulation. In addition to skilled evaluators, there is also a need for greater understanding of evaluation purpose and procedures by practitioners, administrators and community leaders, who are expected to cooperate with evaluation efforts and to put to use the findings that emerge from evaluation study. The course has been designed for the participant to achieve both functions: (1) for those who design and execute an evaluation research program; as well as (2) for those who are involved in policy making, administration, and the conduct of evaluated program.

The primary objective of the course is to provide the participants with the relevant knowledge and scientific skills needed to design and execute evaluation research programs under the constraints of an interactive socio-political environment. Various major topics to be covered in the course are: evaluation designs and methodologies; data source and data gathering techniques; validity and reliability of evaluation methodologies; special social and economic considerations, problems and pitfalls in execution; and communication and implementation of findings in evaluation research.

COURSE TIMING

The course requires 40 contact hours over a three-month period.

RELATIONSHIP OF COURSE TO JOBS OF PARTICIPANTS: This course is designed to provide an introduction to the elements of evaluation procedure which would be used by an evaluator in assessing the activities of persons performing a variety of job activities. Some examples of these relationships are:

1. Collection and compilation of data
2. Establishment of short and long-term data and information systems.
3. Evaluation methodology and application
4. Survey, design and install local government financial and accounting systems.
5. Analysis of local government financing mechanisms and their adequacy
6. Analysis of participation in programs.

INSTRUCTORS

Dr. Mesbah U. Ahmed will be coordinating this course. The instructors involved in teaching this course are: Dr. Barry Griffin, Dr. Stan King, Dr. Lonnie Nickles, Dr. Marab Thakur, Dr. Richard Ford, Dr. Donald Shadcan, Dr. Charles Barrett, Dr. James Karns, and Dr. Mesbah Ahmed. (Their bio-data are included in Appendix)

EVALUATION AND RESEARCH: INTRODUCTION

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
I	1. Introduction to Basic Concepts of Evaluation Research Purpose of Evaluation, Planning an Evaluation Study, Evaluability Assessment, Evaluation Research in the Political Context	3	
II	1. Basic Statistical Concepts a. Kinds of measurements: Nominal Scale, Ordinal Scale, Equal Interval Scale, Ratio Scale, Overt & Covert Design b. Tabular Analysis c. Graphic Analysis d. Measures of Central Tendency and Dispersion e. Construction and Interpretation of Index Numbers	5	
III	1. Evaluation Design and Methodologies a. Selection of Measures for Evaluating Program b. Quasi-Experimental Design c. Relative Cohort Designs as an On-Going Research d. Measurement of Outcome e. Measurement of Process f. Relationship of Process and Output to Outcome and Benefit g. Collection of Data	11	

EVALUATION AND RESEARCH: INTRODUCTION

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
IV	1. Data Analytic Methods a. Statistical Inference and Analysis of Relationship, Validity, Reliability and Special Problems of Measurement in Evaluation Research	6	
V	1. Problems and Pitfalls in Evaluation Research Study, Implementation of Evaluative Findings, Relationship with Program Personnel, The Social Context of the Program. Evaluation and Management. Organization of Evaluation Function. Evaluation and Society.		
VI	1. Economic Analysis - Cost/Benefit Analysis a. Role of Public Sector in Economy b. Estimating Demands and Evaluating Benefits c. Production and Cost in Public Sector d. Prices, charges and Subsidies in the Public Sector e. Discounting Benefit and Costs f. Cases dealing with Cost/Benefit Analysis	6	
VII	1. Special Social and Economic Considerations (Case Studies)	4	

3. READINGS

1. American Institute for Research: Evaluative Research Strategies and Methods, American Institute of Research, 1970.
2. Bernstein, Ilene N. (Editor): Validity Issues in Evaluation Research, Sage Publication, 1976.
3. Brown, R.D., Braskamp, L.A. and D. Newman; "Evaluators Creditability as a Function of Report Style: Do Jargon and Data Make a Difference, Evaluation Quarterly, Vol. 2, No. 1, Feb. '78, pp. 315-30.
4. Boruch, R.F., McSweeny, A.J. and Soderstorm, E.J.; "Randomized Field Experiment for Program Planning, Development and Evaluation: An Illustrative Bibliography," Evaluation Quarterly, Vol. 2, No. 4, Nov. 78, pp. 655-695.
5. Cangelosi, Taylor and Rice; Basic Statistics: A Real World Approach, 2nd Ed., West Publishing Co., 1979.
6. Caro Francis; Readings in Evaluation Research; Russell Sage Foundation, N.Y., 1977.
7. Cochran, Nancy, "Grandma Moses and the Corruption of Data," Evaluation Quarterly, Vol. 2, No. 2, May '78, pp. 363-74.
8. Cook, Thomas (Editor): Evaluation Studies Review Annual, Vol. 3, Sage Publication, 1978.
9. Franklin, J.L. and J.H. Thrasher: An Introduction to Program Evaluation, John Wiley & Sons, 1976.
10. Glass, G.U. (Editor): Evaluation Studies: Review Annual, Vol. 1, Sage Publication, 1976.
11. Henry, W. & W.W. Haynes, "Managerial Economics: Analysis and Cases," 4th Ed., Business Publication, 1978.
12. Guttentag, Marcia (Editor): Evaluation Studies: Review Annual, Vol 2, Sage Publication, 1977.
13. Maas, A. "Benefit-Cost Analysis: Its Relevance for Public Decision Making. Quarterly Journal of Economics, 1966.
14. Moursand, J.P.; Evaluation: An Introduction to Research Design, Brooks/Cole Publishing Co., 1973.
15. Palvka, L. & E. Steg; "Program Evaluation and Policy Development: Bridging the Gap," Evaluation Quarterly, Vol. 2, No. 4, Nov. '78, pp. 696-707.
16. Rossi, Peter H., and S.R. Wright; "Evaluation Research: An Assessment of Theory, Practice and Politics," Evaluation Quarterly, Vol. 2, No. 1, Feb. 1977, pp. 5-52.
17. Rutman, L. (Editor): Evaluation Research Methods: A Basic Guide, Sage Foundation, 1977.

18. Struening, E.L., and M. Guttentag; Handbook of Evaluation Research, Vol. 1 and Vol. 2, Sage Publication, 1975.

19. Suchman, E.A.; Evaluative Research, New York, Russel Sage Foundation, 1967.

20. Weiss, C.H.; Evaluation Research, Englewood Cliffs, NJ: Prentice Hall, 1972.

4. BIOGRAPHICAL DETAILS OF INSTRUCTORS

Dr. Charles F. Barrett, Associate Professor in Economics received his Ph.D. from the State University of New York at Buffalo, N.Y. in 1969. His professional background includes over 15 years of college teaching, business consulting, and research and publications. His special areas include statistics and mathematical economics, managerial and consumer economics, and resource allocations. Additionally Dr. Barrett headed a research effort sponsored by U.S. Department of Defense to investigate the cost effectiveness of learning theory used in the aerospace program. This project culminated in a report published by the Defense Documentation Center in Washington, D.C.

Dr. Richard K. Ford, Assistant Professor of Economics, received his Ph.D. from the University of Arkansas at Fayetteville, Arkansas in 1979. His dissertation consisted of an economic analysis of urban water demand elasticities within the water shed regions of Arkansas. He has taught at the University level for four years while pursuing research interests. His special areas of concentration include computer assisted statistical analysis, emperical micro-economics, developmental economics and mathematical economics.

Dr. Barry Griffin's previous work experience includes 8 years of management consulting, most of which concerns health-related projects. He held the position of Director of Statistical Analysis at Minnesota Systems Research, an organization with broad-based experience in the development and application of planning, management, and evaluation methods for human service delivery systems. Before joining the faculty at Eastern Kentucky University, Dr. Griffin directed a project which assessed the impact of Minnesota's medical assistance reimbursement methodology on nursing homes' average income. His current interests include project evaluation methodologies and the detection of erroneously reported statistics.

Dr. M. Stan King received his Bachelor of Business Administration and Master of Science degrees in Business and Economics from Texas A&I University. His Doctor of Business Administration degree is from Mississippi State University with concentrations in Management, Marketing, Economics, and Quantitative Analysis. In addition to fourteen years teaching experience and twenty different course preparations, Dr. King has eight years industrial experience in the field of marketing and personnel administration. He has planned, coordinated or served as a program leader in more than one hundred seminars and conferences and currently is the Director of the Management Development and Studies Institute at Eastern Kentucky University.

Dr. Donald Shadoan holds a Ph.D. degree from the University of Kentucky. His major areas of study were economic theory, research methods and statistics agricultural economics and production economics. He has been on the faculty at Eastern Kentucky University since September of 1962 and has served as Chairman of the Department of Economics since 1966. Dr. Shadoan has done consulting work for governmental agencies, business firms and legal firms. He is a member of the Southern Economics Association, Economic Education Association, and the Kentucky Economic Association.

Dr. Lonnie J. Nickles received his BA degree in Economics at the University of Arkansas, his MA and Ph.D. degrees in Economics from the University of Missouri, Columbia. Dr. Nickles has served on the faculty of Management Science at the University, and Professor of Business Administration at Eastern Kentucky University. He has published in several academic journals in the fields of economics, information systems, and management science. He has served as consultant to Virginia State College, several businesses, and The Governors Council of Traffic Safety-State of Texas. He has worked under federal, state, and local grants and is currently serving as coordinator of the electronic data processing program at Eastern Kentucky University.

Dr. James Karns teaches in economics and statistics. He holds a Ph.D. in economics from the University of Oklahoma and has taught at the United States Air Force Academy and The George Washington University, in addition to Eastern Kentucky University. His research has been in quantification of economic phenomena.

Dr. Mesbah U. Ahmed will be coordinating the evaluation and research phase of the program. Dr. Ahmed received his Masters and Ph.D. in Industrial Engineering, with specialization in operations research, applied statistics and agricultural economics from Texas Tech University. He is an active member of various interdisciplinary professional associations, and has presented and published numerous research papers.

Dr. Manab Thakur will assume primary responsibility for coordinating (and participating) the program on Appropriate Production and Marketing Systems/Skills. Dr. Thakur has extensive research experience in various parts of the world including Europe, Middle East and the Far East. His research interests include Comparative Management, Organization Development, Equal Opportunity, Managerial Compensation, and other areas of Management. He has to his credit ten publications and has led executive seminars and training programs in different parts of the world.

Dr. Thakur's current research projects are in Comparative Management, Managerial Compensation and Organization Development. His Ph.D. thesis deals with Comparative Management and the application of the concept of Organization Development in different areas of personnel, training, and management.

PRODUCTION AND MARKETING SYSTEMS/SKILLS

Course Coordinator: Dr. Manab Thakur

1. CURRICULUM CONTENT & COURSE RELEVANCY

In almost all areas of production, the potential entreprenuer has the choice of either accepting "cottage industry" technology and the accompanying set of village-based skills or highly capital intensive industrial technologies. In the former case, the current market conditions no longer favor such technology. In the latter case, the amount of capital required and the limited managerial skills available tend to prohibit such private investments.

In order to bring substantial changes in the situation, the establishment, in conjunction with one's agencies, should appreciate the appropriate production and marketing systems/skills. This knowledge would equip the personnel concerned to make effective decisions regarding production and marketing. It is suggested that a program of this kind should include:

- Economic concepts fundatmental to Decision-making in Production & Marketing
- Basic concept of Production
- Design of Productive Systems
- Production Planning & Control
- Productivity Management
- Production & Other functional areas
- Consumer Behavior
- Marketing Systems & Research
- Pricing
- Promotion
- Industrial & International Marketing
- Distribution

The objective of this part of the program is to assist the participants not only to acquire knowledge in production and marketing but also to identify and solve the nature of problems faced by using the modern techniques backed up by a pool of experts in the profession.

RELATIONSHIP OF COURSE TO JOBS OF PARTICIPANTS: This course is particularly relevant to the goals of the Agency.

PRODUCTION AND MARKETING SYSTEMS/SKILLS

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
I	1. Economic Concepts Which are Fundamental to Decision-Making in Production and Marketing	3	Dr. Ahmed
II	1. Design of Productive Systems	4	Dr. Lin
III	1. Production Planning and Control	4	Dr. Ahmed
IV	1. Marketing Systems and Environments	3	Dr. Sherwood
V.	1. Marketing Research	3	Dr. Wagner
VI	1. Market Definition	2	Dr. Sherwood
VII	1. Product Planning and Development	2	Dr. Sherwood

PRODUCTION AND MARKETING SYSTEMS/SKILLS

Course Outline

MODULE	SUBJECT MATTER	CONTACT HOURS	SAMPLE OF INSTRUCTORS
VIII	1. Productivity Management	4	Dr. Thakur
IX	1. Pricing Objectives and Price Determination	3	Mr. Hungerland
X	1. Promotion	2	Mr. Hungerland
XI	1. International Marketing	4	Dr. Sherwood
XII	1. Industrial Marketing 2. Distribution	2 6	Dr. Sherwood Dr. Sherwood

3. READINGS

1. Production/Operations Management. Moore & Hendrick. Richard Irwin, 197

2. Foundations of Marketing. Boone & Kurtz. Dryden Press, 1977.

The above texts will be supplemented by further reading materials, special assignments and case examples.

4. BIOGRAPHICAL DETAILS OF INSTRUCTORS

Dr. Mesbah U. Ahmed will be coordinating the evaluation and research phase of the program. His teaching and research experience includes optimization, statistical analysis, information systems, environmental pollution control, agricultural economics and evaluation of public policies in irrigation and waste-water treatment projects. In addition to his teaching and research activities, Dr. Ahmed has served as the planning officer in the Planning and Research Division of the Bangladesh Industrial Development Corporation, and as a systems analyst for the Air Pollution Control Programs for Lubbock County, Texas. His current research activities are in energy modeling and coal economics. In his dissertation a systems simulation model was developed and applied in evaluating the costs effectiveness of alternative sewage treatment and effluent irrigation projects.

Dr. Ahmed received his Masters and Ph.D. in Industrial Engineering, with specialization in operations research, applied statistics and agricultural economics from Texas Tech University. He is an active member in various interdisciplinary professional associations, and has presented and published numerous research papers.

Mr. Robert L. Hungarland has been teaching at Eastern Kentucky University since 1964. He has 25 years business experience with the Western Union Telegraph Company. His educational background is Oklahoma City University, Southern Methodist University, Dallas and Arizona State University.

Dr. Engming Lin received his Ph.D. in 1971 from Texas Tech University; major areas of study: Quantitative Analysis, Production & Operations Management; eight years of teaching experiences in Statistics, Production Management, and Quantitative Analysis; business experience includes Statistical Quality Control and Experiental Design; four years of business consulting mostly with small businesses.

Dr. Charles Sherwood received his B.A. degree in Economics at Denison University, M.B.A. from the University of Michigan, and Ph.D. in Marketing and Transportation from the University of Arkansas. Dr. Sherwood has 11 years of teaching experience at 3 universities and has also worked for General Motors and Research Associates of Little Rock, Arkansas. He has published many academic journal articles in the field of transportation and distribution and is currently the coordinator of the distribution program at E.K.U.

Dr. Manab Thakur will assume primary responsibility for coordinating (and participating) the program on Appropriate Production and Marketing Systems/Skills. Dr. Thakur has extensive research experience in various parts of the world including Europe, Middle East and the Far East. His research interests include Comparative Management, Organization Development, Equal Opportunity, Managerial Compensation, and other areas of management. He has to his credit ten publications and has led executive seminars and training programs in different parts of the world.

Dr. Thakur's current research projects are in Comparative Management, Managerial Compensation and Organization Development. His Ph.D. thesis deals with Comparative Management and the application of the concept of Organization Development in different areas of personnel, training, and management.

Dr. Kenneth Wagner has completed academic preparation in the areas of science, business and post-secondary education. His industrial background includes employment in marketing and marketing support organizations as well as production technology and project planning. His experience includes industrial positions in such industries as computer manufacturers, the automobile industry, and industrial production shops.

APPENDIX A

Description of Special Projects Coordinator

EASTERN KENTUCKY UNIVERSITY

Richmond, Kentucky 40475

DIVISION OF CONTINUING EDUCATION
INTERNATIONAL EDUCATION
Director
Foreign Student Advisor

THE OFFICE OF THE DIRECTOR OF INTERNATIONAL EDUCATION AND FOREIGN STUDENT ADVISOR

Eastern Kentucky University has a foreign student population of approximately one hundred and fifty. These students come from about 40 different countries, but the largest single block comes from the Middle East.

The Office of Foreign Student Advisor assumes responsibility for the advisement of foreign students as to class schedules, the assignment of special classes to those students having difficulty with English and assistance in dealing with social or other adjustment problems. This office also assists the student in meeting Immigration and Naturalization Services requirements and in filling out the appropriate forms and documents.

The International Education function of the Office exists primarily to facilitate contact between foreign and domestic students and to disseminate information of interest to both. The Office and the Committee for International Education facilitates exchange between those faculty members who have special language skills or who have taught or traveled abroad.

Every effort is made to integrate the international students into the life of the University in general and to avoid the problems of isolation which often occur upon initial entry into a foreign country.

DUTIES of SPECIAL PROGRAMS COORDINATOR

1. Get beginning students familiar with campus and town.
2. Continue to assist students with solutions to problem areas, both academic and personal.
3. Continue to work with students at their request, on such matters as note-taking and other techniques that will contribute to course success in general.
4. See that students are informed about the various extra-curricula activities open to students and encourage them to participate in cultural and social opportunities.
5. Make sure students know how to get needed medical and dental care, etc.

APPENDIX B

BUDGET

Bluegrass Consortium

Eastern Kentucky University

Academic Training

I.	Fixed Maintenance Cost	
	Salaries	$11,631
	Benefits	1,861
	Travel	280
	Supplies	2,550
	Indirect Cost	1,307
	Maintenance Cost Total	$17,628
II.	Program Operating Cost	
	Salaries	32,203
	Benefits	5,253
	Travel	677
	Supplies	926
	Indirect Cost	2,966
	Operating Cost Total	42,025
	Total Annual Training Cost (Maintenance + Operating)	$59,653

NOTE: Years Two through Five are subject to an annual percentage cost increase of 7%.

~~PN-AAJ-381~~
~~XD-AAJ-380-A~~

BLUEGRASS CONSORTIUM
REPORT TWO
ORDEV TRAINING PROGRAM
ACADEMIC TRAINING
MOREHEAD STATE UNIVERSITY

SEPTEMBER, 1979

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APPENDIX I, CURRICULUM FOLIOS

APPENDIX II, FACULTY CREDENTIALS

APPENDIX III, FACULTY EVALUATION

INTRODUCTION

This proposal entails a plan for training employees of and other officials related to the Organization for the Reconstruction and Development of Egyptian Villages. It is felt that upon completion of the proposed three months training program at Morehead State University, three months training program at Eastern Kentucky University, and a one month period of on-the-job training at the Bluegrass Area Development District, the trainee should be able to return to the Arab Republic of Egypt and serve in one of the following ways:

1. trainer in the ORDEV Academy
2. technical advisor in the field
3. administrator of the Local Development Fund
4. small business advisor and resource person

The entire training program will be oriented toward the decentralization of Egyptian development and the creation of the entrepreneural skills necessary to achieve this goal.

The curriculum, detailed later in the report, was developed under the assumption that most, if not all, of the trainees will be receiving their first training in the United States at Morehead State University. Based on the experience gained from teaching the current ORDEV trainees, it is felt that all the training courses should be special courses. This allows the training to be targeted toward ORDEV needs, and it facilitates adjustment to a different culture by the trainees.

By agreement with the Bluegrass ADD, the budget for the plan is based on two groups of trainees per year, ten students to a group.

CURRICULUM OVERVIEW

The proposed curriculum focuses on applied business skills, and the program has been designed on the premise that the trainee would receive his first training by the Bluegrass Consortium at Morehead State University. The purpose of this curriculum is to provide a foundation on which Eastern Kentucky University can build in order to provide somewhat more specialized training. With this training provided, by the two Universities provided, the Bluegrass ADD then should be able to provide meaningful on-the-job training placements.

The group of trainees on the campus during the Spring of 1979 completed five training courses in three months. Evaluation of trainee progress indicates that the number of courses should not be changed.

Each course is specially designed and taught for this program. Forty hours of instruction will be provided in each course and four units of continuing education credit for each course will be given.

Instructors will be drawn from the faculty of the School of Business and Economics, and credentials of those individuals tentatively selected to teach in the program appear in Appendix II. Possibly, the five instructors utilized in the Spring 1979 program would be utilized though not exclusively.

The goals for the basic business skills curriculum are as follows:

1. To give the trainee an appreciation of how a decentralized economic system works including the role of the entrepreneur in such a system.
2. To demonstrate the viable role of the small business enterprise in a developing economy.
3. To lend an understanding of the role of government in the economic development process.
4. To provide the trainee with basic business skills in accounting, finance marketing, management, and small business organization and management.

If these targets are met, it is felt that the ORDEV staff and others receiving the training should be able to train others in the skills learned, apply these skills on the job, and serve as technical assistance resource persons.

In order to meet these training needs, the following courses are proposed:

ACCT TC-01	Financial and Managerial Accounting Principles
ECON TC-01	Seminar in Economic Development
FIN TC-01	Basic Business Finance
MNGT TC-01	Seminar in Enterprise Development
MKT TC-01	Basic Marketing and Management

Appendix I contains course outlines for each of the five courses.

It is felt that to the extent allowed, ACCT TC-01 and ECON TC-01 should be the first or among the first courses in which the trainees will enroll. The concepts basic to the courses form a foundation for many of the other courses. Contrariwise, MNGT TC-01 will serve as a capstone course and will be taught last or among the last group of courses taught when possible. This course serves to pull together the concepts taught in the other courses.

It is felt that basic business skills are a vital component of any training which has as its goal the promulgation of entrepreneural abilities. The skills gained are of a general nature, but they are a vitally necessary component of those skills needed by loan officers, industrial development officers, financial and accounting officers, and citizen participating officers. Those involved in the process of economic development should be able to evaluate business plans; to advise village councils on the operation of on-going projects; to identify, help design, and monitor projects; to understand budgetary obstacles of development; and to be able to elicit the support of various groups.

To the extent possible, the five courses will be oriented toward the problems which exist in rural areas and in agriculture. The intent is to lend insight into the current obstacles to development as well as providing a base for future development activities.

The skills taught in this area parallel those skills required as prerequisites for many Master of Business Administration programs, Morehead State University included, and they are similar to some of the core requirements for a Bachelor of Business Administration degree.

Flexibility is built into the proposed programs. Courses may be omitted if the need arises; content, as shown in the course outlines in Appendix I may be changed as necessary; and, other courses may be added if the need arises. In fact, it would be relatively easy to expand the curriculum to provide programs for more specialized training in the areas of information flow and data management, production, and marketing skills. Should the need arise, some courses could be merged, with fewer topics being covered, and new courses could be inserted.

Present plans would provide for the five courses to be taught in approximately three months. However, scheduling can be modified to meet existing conditions.

PROJECT STAFFING

Plans for staffing are necessarily tentative due to the mobility of people in the academic world. Therefore, the persons identified presently for the project staff could change by the time the project is implemented. However, should changes occur, every effort will be made to make replacements with personnel of equal or better qualifications.

The personnel tentatively identified include Dr. Joe Copeland as project coordinator. Dr. Copeland coordinated the Spring 1979 program in which seven ORDEV employees were trained. Support personnel have not been identified, but the personnel who are to teach are identified as follows:

Course	Instructor
ACCT TC-01	Mr. John Osborne
ECON TC-01	Dr. Joe Copeland
FIN TC-01	Dr. William Whitaker
MNGT TC-01	Dr. Bernard Davis
MKT TC-01	Dr. William Pierce

The credentials for these faculty members are contained in Appendix II. It should be pointed out that Dr. Copeland, Dr. Davis, Mr. Osborne, Dr. Pierce and Dr. Whitaker taught in the Spring 1979 ORDEV training program on the Morehead State University campus.

It also should be noted that Dr. Whitaker, who is Dean of the School of Business and Economics, has been heavily involved in the program from the standpoint of teaching and program design and operation.

TRAINEE EVALUATION

Basically trainees will be evaluated in each class based on their classroom performance. Classroom performance, in this case, will be judged on participation in classroom discussions and on problem assignments which will be given.

It should be noted that MNGT TC-01 is a capstone course for all three areas of training. Cases used in this class will be tailored toward the area of training that each group of trainees is to receive. Therefore, the level of performance in this class will be directly related to trainee performance in other classes.

At the end of three months training period, the trainees and the training staff will meet in a seminar the purpose of which will be to determine the areas of training which need strengthening. At this time, efforts will be made to determine the overall performance of the trainee and value of the training given.

In addition to trainee evaluation, it is anticipated that the trainees will evaluate their instructors. The instrument to be used will be the same as the one regular Morehead State University students use to evaluate the faculty. This instrument is being utilized in the current training program for ORDEV employees. A copy of the instrument is attached as Appendix III.

ACCOMMODATIONS

It is anticipated that the trainees will be housed on the Morehead State University campus. This housing would consist of married student apartments or, in some cases, dormitory space. All the housing units are a short distance from grocery stores, school cafeterias, and private restaurants.

The trainees will have full use of most of the University facilities including the library, infirmary, and athletic facilities.

Classes would be held in regular classroom buildings or in a special training facility for this program. If a special facility is used, the primary and perhaps only use of the facility would be for this program.

The Morehead State University campus is located near downtown Morehead, so the trainees will be located only a short distance from an area which can serve their commercial needs.

CULTURAL ADJUSTMENT

In order to help the student adjust to a new cultural environment, numerous activities will be provided.

The trainees will be encouraged to join the Cosmopolitan Club, a student organization whose purpose is to provide a cultural interchange between the students of many countries. Efforts will be made to find host families for the trainees, and this should assist the necessary cultural transition.

Trainees will have the opportunity to attend dinners, dances, and athletic events according to their interests.

Telephones will be available in the rooms for those who desire them. Public phones are close-at-hand in the housing units. Initially, the trainee will be given instruction and assistance in calling Egypt if the trainee desires.

It is felt that some of the field trips provided as a part of the academic training will help the student better understand the American society in which he will be living. Included in these tours will be visits to the University farm, factories, hatcheries, and other businesses.

When possible, the class schedules will be arranged so that the last class each day will terminate by 2:00 P.M., so the trainee may take his meals on a schedule similar to the one that he follows when he is home. Further efforts will be made to schedule as few classes as possible on Fridays so that interference with the religious practices of the Moslem trainees will be minimized.

The program coordinator and others on the training staff will be in daily contact with the trainees and will make every effort to assist them in making cultural adjustments.

Tape recorders will be provided primarily for academic training support, but these cassette units also aid in the cultural adjustment process. The current group of trainees have used the recorders to record lectures, and this speeds the improvement of their English language capabilities. They also have used the recorders to send "oral letters" back to Egypt, to play tapes of Egyptian music that they brought from Egypt, and to record various types of American music.

BUDGET

The budget for this plan is based on several assumptions. First, it is assumed that trainee travel costs, books, and living expenses will be paid directly to the trainee by AID since this is the case with the current group of trainees at Morehead State University. Therefore, these expenses are not shown in the budget which follows. It should be noted that the present living expense allowance appears to be quite ample for the trainee while he is in Morehead; this is due in part to the provision of married student apartments for which the rent is less than $100 per month.

The second assumption involves fixed administrative costs. Experience with the present group of trainees has shown that a great deal of time must be spent in making arrangements for housing, recreation, medical services, ordinary purchases during the first few weeks, field trips and related travel, and other details to directly provide service to the trainees. Added to these necessities are the duties of program coordination with the Bluegrass ADD, contact with AID on numerous program and contract details, class scheduling, and overall program coordination and evaluation. In order to provide optimal training, the aforementioned details must be handled in an expeditious manner. Therefore, a regular faculty member will be released from some of his normal classroom duties to perform some of these duties and to supervise a graduate assistant and a secretary who can perform some of these duties. The proposed coordinator is Dr. Joe Copeland who is coordinating the present program. These costs are escapable if it would be known some months in advance that no training would be provided during a given time period; otherwise, these costs would be incurred so that the training would be available if trainees are sent. Administrative travel expenses are included in order to pay the costs of trips needed for program coordination, such as trips to Lexington and Richmond, Kentucky.

For calculation of the variable costs, or costs that occur only if training is provided, the assumption is made that two groups of ten trainees would receive training each year and that the two groups would not be at Morehead State University at the same time.

If two groups are at Morehead State University at the same time or if the group size should exceed 20 trainees, then the costs would vary from those shown in the budget.

Indirect costs are calculated on the basis of eight percent of the group totals, and it is assumed that this rate will remain constant over the five year planning period.

The budget for years two through five are calculated by multiplying the previous year's budget by 1.1, which assumes an increase in costs of 10 percent per year. This 10 percent increase is made to cover inflation as well as such items as normal pay increases for the personnel involved. Therefore, individual lines on

the budget for year one may be adjusted upward by 10 percent a year compounded if individual lines are needed for subsequent years. The budget for year one is based on costs which are anticipated for the next year at Morehead State University. Should the program begin at a later date, then costs may be higher.

The travel expense listed is primarily to provide travel to Lexington due to the role that the Bluegrass ADD is to play in the training. In similar vein, long-distance phone calls to Lexington and to Washington occasionally would be necessary.

The cassettes and tapes have proven to be an effective means to enhance instruction and the social adjustment with the current group of trainees, and these items should be provided for each member of subsequent groups. Hand-held calculators will be required for many of the training classes, and it will be necessary to provide instructors with calculators like those the trainees will have.

Due to the many uncertainties and assumptions, it is assumed that a contract for training would be negotiated thereby making the costs shown in the following budget tentative.

Bluegrass Consortium

Morehead State University

Academic Training

I.	Fixed Maintenance Cost	
	Salaries	$12,290
	Benefits	2,581
	Travel	186
	Supplies	92
	Indirect Cost	1,212
	Maintenance Cost Total	$16,361
II.	Program Operating Cost	
	Salaries	$21,000
	Benefits	4,410
	Travel	600
	Supplies	1,750
	Indirect Cost	2,221
	Operating Cost Total	29,981
	Total Annual Training Cost (Maintenance + Operating)	$46,342

NOTE: Years Two through Five are subject to an annual percentage cost increase of 10%.

APPENDIX I

CURRICULUM FOLIOS

MOREHEAD STATE UNIVERSITY

CURRICULUM FOLIO

COURSE:

ACCT TC-01, Financial and Managerial Accounting Principles

COURSE DESCRIPTION:

Fundamentals of financial and managerial accounting with special emphasis on the accounting tools needed for the success of an enterprise and for project monitoring.

COURSE CONTENT:

Accounting cycle, balance sheet, income statement, statement of changes in financial position, accounting records, financial statement analysis, and understanding of financial statements.

Basics of managerial and cost accounting systems, full costing, differential costs, alternative cost analysis, budgeting, capital budgeting, and variance analysis.

COURSE REQUIREMENTS:

Classroom Instruction

Required--three hours of classroom lecture per week.

Reading of text, attendance at lectures, discussion of procedures and accounting examples. Completion of outside problem assignments, and progress quizzes.

TERMINAL PERFORMANCE:

Understanding of the essentials of accounting and procedures.
Familiarization with accounting terminology.
Financial statement construction and analysis.
Cost accounting concepts and systems.
Use of managerial accounting information for decisions.
Essentials of cost planning and control.

MOREHEAD STATE UNIVERSITY

CURRICULUM FOLIO

COURSE:

ECON TC-01, Seminar in Economic Development

COURSE DESCRIPTION:

An overview of the operation of a profit motivated economy and the economic role of government, fundamentals of economic development and growth, and the role of government in the processes.

COURSE CONTENT:

1. Overview of a market economy and the role of profits
2. Diminishing returns and economies of scale
3. Fundamental economic development
4. Sector and industry linkages
5. Project evaluation including benefit/cost analysis
6. Role of government in the development process
7. Basics of economic planning

COURSE REQUIREMENTS:

Classroom Instruction

Required--three hours of classroom lecture per week.

TERMINAL PERFORMANCE:

To be familiar with the above activities.

MOREHEAD STATE UNIVERSITY

CURRICULUM FOLIO

COURSE:

FIN TC-01, Basic Finance

COURSE DESCRIPTION:

Financial management, management of cash, receivables, inventories, plant assets, short-term debt, long-term debt, intermediate-term debt, and owner's equity.

COURSE CONTENT:

1. Role of financial management
2. Financial analysis (liquidity ratios, debt ratios, profitability ratios, and coverage ratios)
3. Funds statements
4. Financial forecasting and cash budgeting
5. Working capital management
6. Cash and marketable securities
7. Accounts receivable
8. Inventory management and control
9. Short and intermediate term financing
10. Capital budgeting
11. Valuation process
12. Required returns on capital investments
13. Capital structure and divided policy
14. Money and capital markets
15. Long-term financing (stocks, bonds, and warrants)
16. Mergers and acquisitions

COURSE REQUIREMENTS:

Classroom Instruction

Required--three hours of classroom lecture per week.

Instruction is based upon a basic business finance text and supplementary materials. A selected number of homework problems will be assigned for most topics covered.

MOREHEAD STATE UNIVERSITY

CURRICULUM FOLIO

COURSE:

MNGT TC-01, Seminar in Enterprise Development

COURSE DESCRIPTION:

A capstone course which draws together the various tools for analyzing small business problems.

COURSE CONTENT:

Topics include forms of business organization and common pitfalls.

1. Cooperatives as a business form.
2. The new venture idea.
3. Analyzing the new venture's feasibility.
4. Developing the business plan.
5. Putting the venture together.
6. The first year of the venture.

Cases, field trips, and outside consultants also will be utilized.

COURSE REQUIREMENTS:

Classroom Instruction

Required--three hours of classroom lecture per week.

Written analysis and oral presentation of the cases by the participants will be expected. There will be limited consultation available from outside sources such as the University of Kentucky Agriculture Extension Service. Field trips to small business ventures will be conducted.

TERMINAL PERFORMANCE:

Ability to analyze realistic case problems.

MOREHEAD STATE UNIVERSITY

CURRICULUM FOLIO

COURSE:

MKT TC-01, Basic Marketing and Management

COURSE DESCRIPTION:

Analysis of markets, market price, cooperative societies, distribution organizations, organized exchange, the management process, and the principles of management as applied to operations of business in the areas of organizations, personnel, production and research.

COURSE CONTENT:

1. Evolution of management theory
2. Principles of organization
3. Motivation and leadership
4. Planning and control
5. The marketing system and its environment
6. Markets: Consumer, reseller, producer, and government
7. Market research
8. Marketing agricultural products
9. Marketing industrial products
10. Marketing cooperatives
11. Distribution
12. Price decision

COURSE REQUIREMENTS:

Classroom Instruction

Required--three hours of classroom lecture per week.

TERMINAL PERFORMANCE:

Students who complete this course will be expected to:

1. Understand factors which influence managers.
2. Relate the functions of management to actual business situations.
3. Develop marking plans for the various forms of business enterprise.
4. Conduct marketing research.
4. Appreciate the importance of marketing in the cussess of a business.

APPENDIX II

FACULTY CREDENTIALS

[The credentials of the Morehead State University and Eastern Kentucky University faculty are lengthy, and have been prepared under separate cover. Copies of both have been formally filed with the USAID Cairo Mission and with the Egyptian ORDEV Offices. Additional copies of the Faculty vitae are available upon request.]

APPENDIX III

FACULTY EVALUATION

MOREHEAD STATE UNIVERSITY

DIRECTIONS FOR STUDENT ASSESSMENT OF FACULTY

Listed below are several qualities which describe aspects of instructor behavior. Rate your instructor on each of these items by drawing a circle around the number that best indicates your instructor's comparison with other instructors you have had. Make every effort to evaluate each item on its own merit. If an item does not apply, please do not mark a response for it. Please mark your responses on the Data Processing Form with a No. 2 pencil. The instructor will give you a four digit number to identify the course. You will pencil in these four numbers in a specified place.

THE INSTRUCTOR	RATING				
	High		Average		Low
1. Provides an outline for the course.	5	4	3	2	1
2. Promptly returns tests or written assignments.	5	4	3	2	1
3. Provides a fair and equitable evaluation system.	5	4	3	2	1
4. Encourages questions from the students.	5	4	3	2	1
5. Uses supplemental material when appropriate.	5	4	3	2	1
6. Provides time for out-of-class conferences.	5	4	3	2	1
7. Gives clear and understandable explanations.	5	4	3	2	1
8. Gives concrete or specific examples where necessary.	5	4	3	2	1
9. Meets the class regularly.	5	4	3	2	1
10. States areas for improvement of student performance.	5	4	3	2	1

DO YOU BELIEVE THAT:					
	Frequently		Infrequently		Never
11. The instructor speaks clearly?	5	4	3	2	1
12. The instructor covers a reasonable amount of material at each session?	5	4	3	2	1
13. The instructor challenges the students to do their best work?	5	4	3	2	1
14. The instructor is interested in the students?	5	4	3	2	1
15. The instructor is pleasant?	5	4	3	2	1
16. The instructor seems to enjoy what he is doing?	5	4	3	2	1
17. The instructor encourages the students to think, as well as to remember?	5	4	3	2	1
18. The instructor is poised and self-confident?	5	4	3	2	1
19. The instructor is receptive to differing opinions or points of view?	5	4	3	2	1
	High		Average		Low
20. Your general rating of the instructor's teaching effectiveness.	5	4	3	2	1

~~PD-AAJ-382~~
~~XD-AAJ-380-B~~

BLUEGRASS CONSORTIUM
REPORT THREE
ORDEV Field Training
Bluegrass Area Development District

August, 1979

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document was financed
with funds received in
a grant from the U.S.
Agency for International
Development, Cairo Mission

Introduction

Report Three, ORDEV Field Training, is the third of four Bluegrass Consortium reports. This report outlines the Bluegrass Area Development District's (BGADD) role in the ORDEV Training Program.

In addition to the design of the field training component of the training program, Report Three describes the BGADD organization and its interaction with local, State, Federal, and private agencies involved in the economic/community development process. Sections describing the BGADD staff and its involvement with other agencies of government are also included in this report.

Report Three

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Section 1

Organization Structure

The Bluegrass Area Development District (BGADD) is one of fifteen area-wide planning jurisdictions in the Commonwealth of Kentucky (Figure 1). The area development districts (ADDs) were created by executive order of the governor and subsequent enabling legislation enacted by the 1972 Kentucky General Assembly to provide planning services and technical assistance to local units of government.

The Bluegrass ADD receives funding from per-capita contributions by local governments and from various state and federal agencies involved in the planning and development process including:

U.S. Department of Housing and Urban Development- provides comprehensive planning grants, community development grants, and housing assistance programs.

U.S. Department of Commerce, Economic Development Administration - provides planning and program grants for economic development activities which address the job creation, unemployment, and under-employment problems of the district.

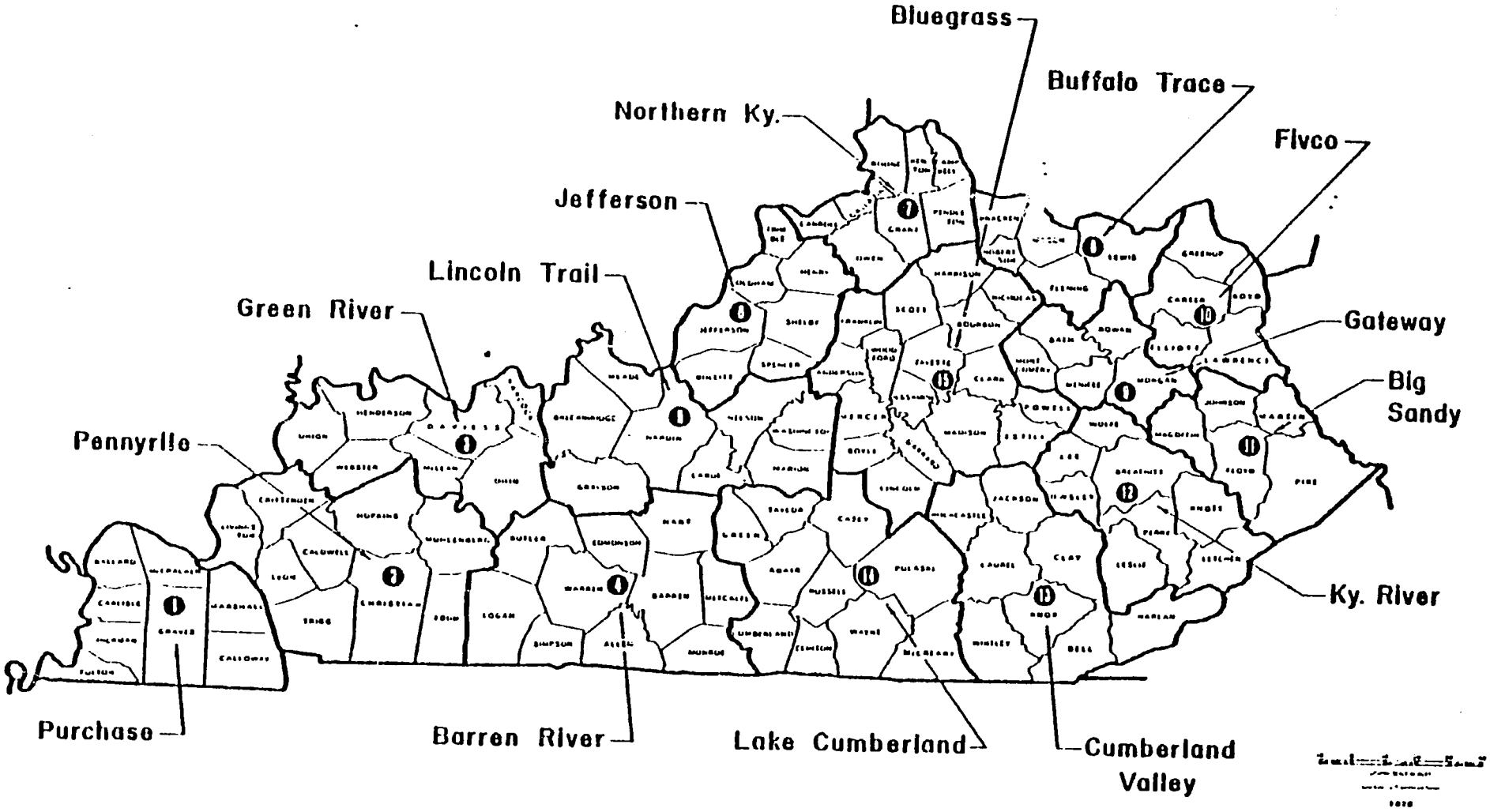
Appalachian Regional Commission - provides grants for assistance to six BGADD counties in the areas of community and economic development planning and programming.

U.S. Department of Labor - provides grants to be used in public sector job creation in selected ADD counties.

Kentucky Department for Local Government - provides administration of the Joint Funding Administration, a consolidation of both Federal and State grant-in-aid programs (See Section II, Operational Overview).

This list is not intended to provide an inclusive list of funding sources; other agencies and their relationship to the Bluegrass ADD's organization and operations will be mentioned in subsequent sections of this report.

OFFICIAL BOUNDARIES OF THE KENTUCKY AREA DEVELOPMENT DISTRICTS



KPDO

Figure 1

The area development districts are public corporate entities governed by a board of directors consisting of both elected officials and non-elected citizen members. The Bluegrass ADD organization structure is established by state law and the District's operating by-laws (See Appendix A).

Board of Directors

The governing and policy-making body of the Bluegrass Area Development District is the Board of Directors. The Board of Directors is composed of 71 individuals from throughout the District. As specified by State regulations, a majority of Directors (at least 36) must be local elected officials. Each of the District's seventeen counties is represented on the Board. (Figure 2)

The Board of Directors has four officers: The Chairman, Vice Chairman, Secretary, and Treasurer. The election of these officers to one-year terms is held at the Directors' Annual Meeting. Officers are limited to serving two consecutive terms.

The Board of Directors conducts quarterly business meetings and is responsible for:

1. Determining the overall strategies, policies, and programs of the District;

2. Conducting the affairs of the District in an orderly manner;

3. Coordinating the work of the District Advisory Committees; and,

4. Representing the District in dealing with State and Federal agencies.

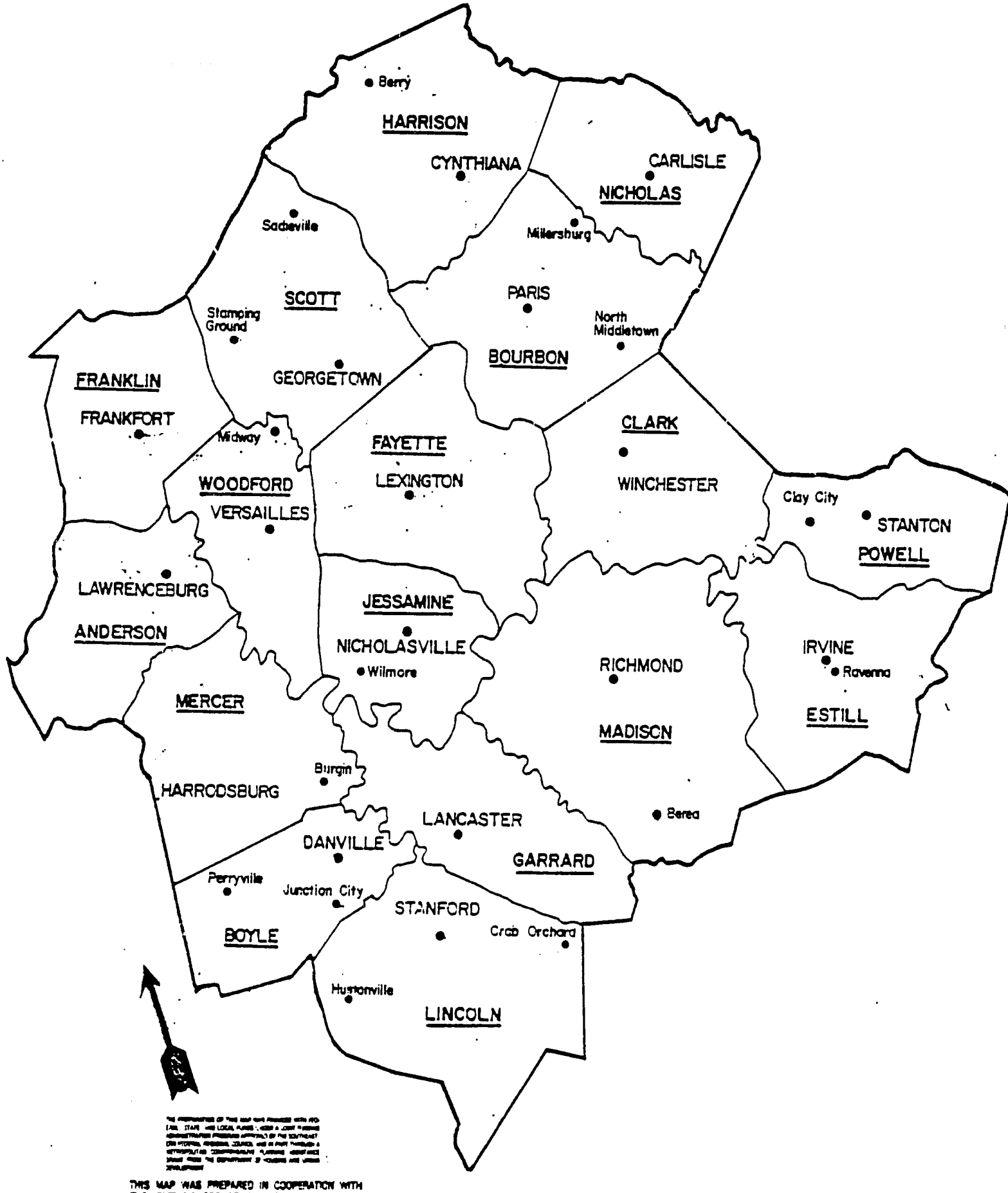
Executive Board

To assist the Board of Directors, a 17-member Executive Board, chosen from the Board Membership, is elected to conduct the management of the District's activities and oversee the normal and recurring business of the ADD.

Each of the district's seventeen counties is represented on the Executive Board, which is composed of nine elected officials and eight citizens members. The Executive Board is chosen from among the full Board of Directors each year at the Annual Meeting. The four officers of the Board also serve one-year terms as officers of the Executive Board.

BLUEGRASS AREA DEVELOPMENT DISTRICT

Figure 2



THIS MAP WAS PREPARED IN COOPERATION WITH THE KENTUCKY DEPARTMENT OF TRANSPORTATION.

SCALE 1" 9 MILES

The Executive Board meets monthly to address business which cannot be postponed until a quarterly Board Meeting. As an arm of the Board of Directors, it has the same responsibilities and is authorized by the By-laws to exercise all powers of the full Board when the latter is not meeting.

Advisory Committees

The Board of Directors is served by seven Advisory Committees. They are:

1. Development
2. Criminal Justice and Public Safety
3. Health
4. Human Resources
5. Natural Resources & Environmental Protection
6. Tourism, Historic Preservation, and Recreation
7. Transportation

Each of these Committees is chaired by a member of the Board of Directors and is composed of other Board members and interested citizens from throughout the District. The basic responsibilities of each Advisory Committee are:

1. To identify problems, needs, and opportunities within the District in a given functional area;
2. To suggest to the Board policy guidelines which should be followed to meet these problems, needs, and opportunities;
3. To assist the Board in formulating District development strategies and specific plans;
4. To assist the Board in determining the priorities with which the District must deal; and,
5. To advise the Board on A-95 review of projects to be undertaken within the District and to formulate new projects. (The A-95 review, a coordination process required by the Federal government, is designed to avoid duplication in the awarding of grants and to avoid conflict with existing plans or programs which are underway.)

District Staff

The Staff of the Bluegrass Area Development District is a team of professionals assembled to provide a broad range of supportive services to the Board of Directors and the local communities throughout the District (Figure 3). Staff implements policies and programs established by the Board to achieve District-wide goals and objectives. In addition to providing direct services, the District Staff aids local units of government by planning for the continued orderly growth of the Region.

The Board, as a partnership of local governments, has received certain Federal/State planning and program designations. It is the responsibility of the Staff to collect and analyze technical information to maintain these designations and insure their continuing benefit to the local communities. This information and assistance is also provided to the Advisory Committees to aid them in their respective duties (Figure 4). The planning and program designations include:

1. Regional Clearinghouse for the A-95 review of applications for Federal grants in both the metropolitan and non-metropolitan areas of the District.

2. Appalachian Regional Commission Local Development District designation which qualifies the District for economic development grants not normally available in non-designated areas.

3. U.S. Department of Housing and Urban Development certification as an Areawide Planning Organization which qualifies the District as a recipient of planning and technical assistance grants.

4. U.S. Department of Commerce, Economic Development Administration designation as an Economic Development District designation which qualifies the District to receive economic development grants and loans not normally available in non-designated areas.

Each of the 48 member governments within the seventeen county area development district is eligible to receive a wide range of program development and technical assistance from staff specialists. Included in the many staff disciplines are:

1. Management Specialists who assist local units of government in budget preparation, administration procedure in the areas of purchasing and personnel management, and development of tourism and recreation programs and assist in

BLUEGRASS AREA DEVELOPMENT DISTRICT
ORGANIZATIONAL CHART

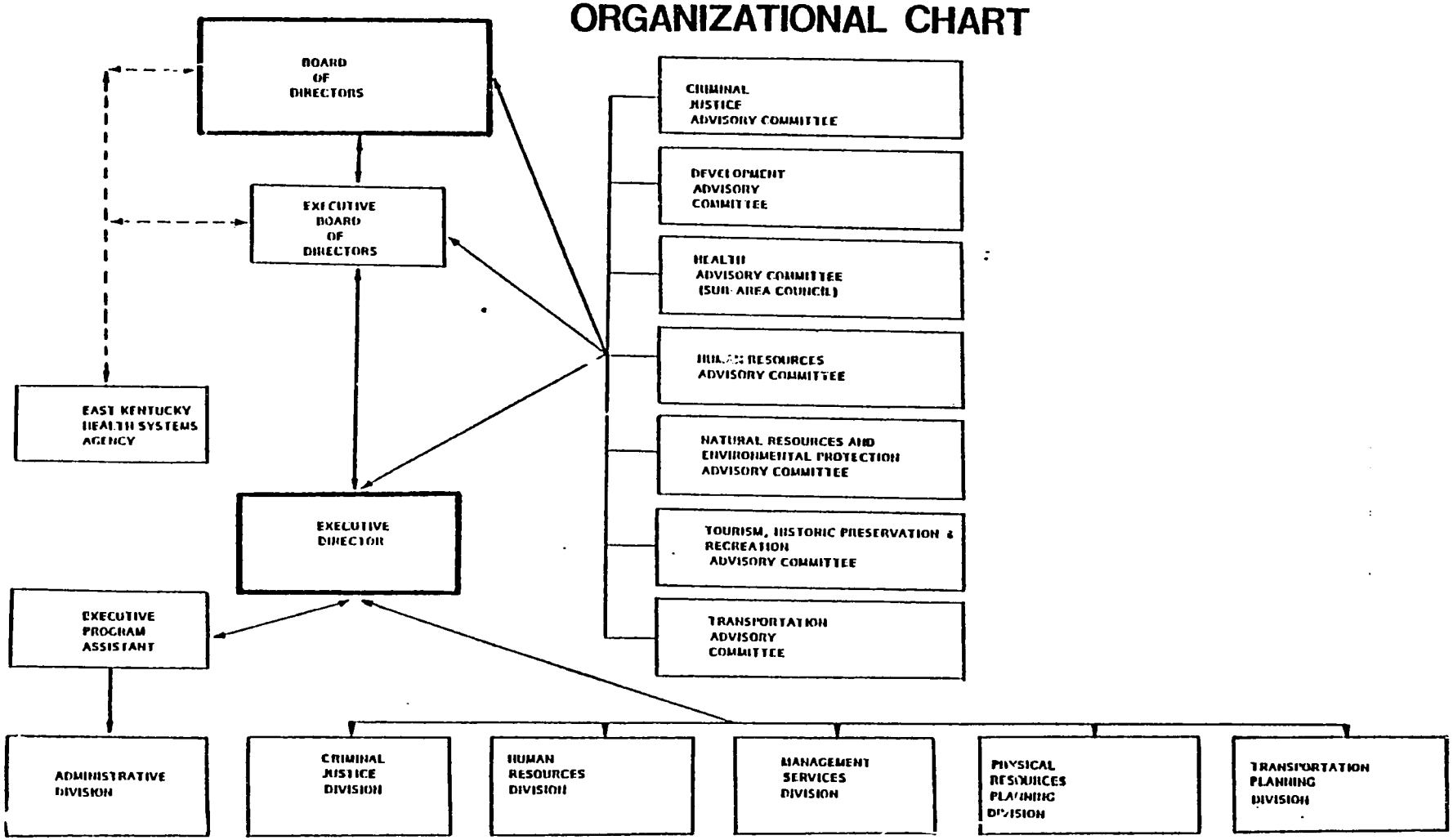


Figure 3

the preparation of grant applications.

2. A staff Civil Engineer advises local units of government in water and sewer programming and grant applications. Water and sewer treatment plant construction and expansion programs in several communities have been awarded grant funds as a result of staff efforts in this area of programs.

3. An Enterprise Development Specialist assists localities in securing grant funds for the planning and development of industrial parks. Staff also provides assistance to both public agencies and private businesses in activities which include plant expansion, market feasibility studies, industrial site selection, and the availability of business loans. Staff has been instrumental in the creation of four local industrial authorities which are in varying stages of planning and developing industrial parks with ADD staff assistance.

4. Urban planners assist local governments in the development of comprehensive plans which include plan elements on land-use, capital facilities, transportation system needs, and housing needs. Staff is presently involved in comprehensive planning for two ADD communities in addition to management assistance to three local community development agencies. Staff has successfully assisted three district communities in obtaining over one million dollars in community development grant funds from the Federal government.

BLUEGRASS AREA DEVELOPMENT DISTRICT FLOW CHART

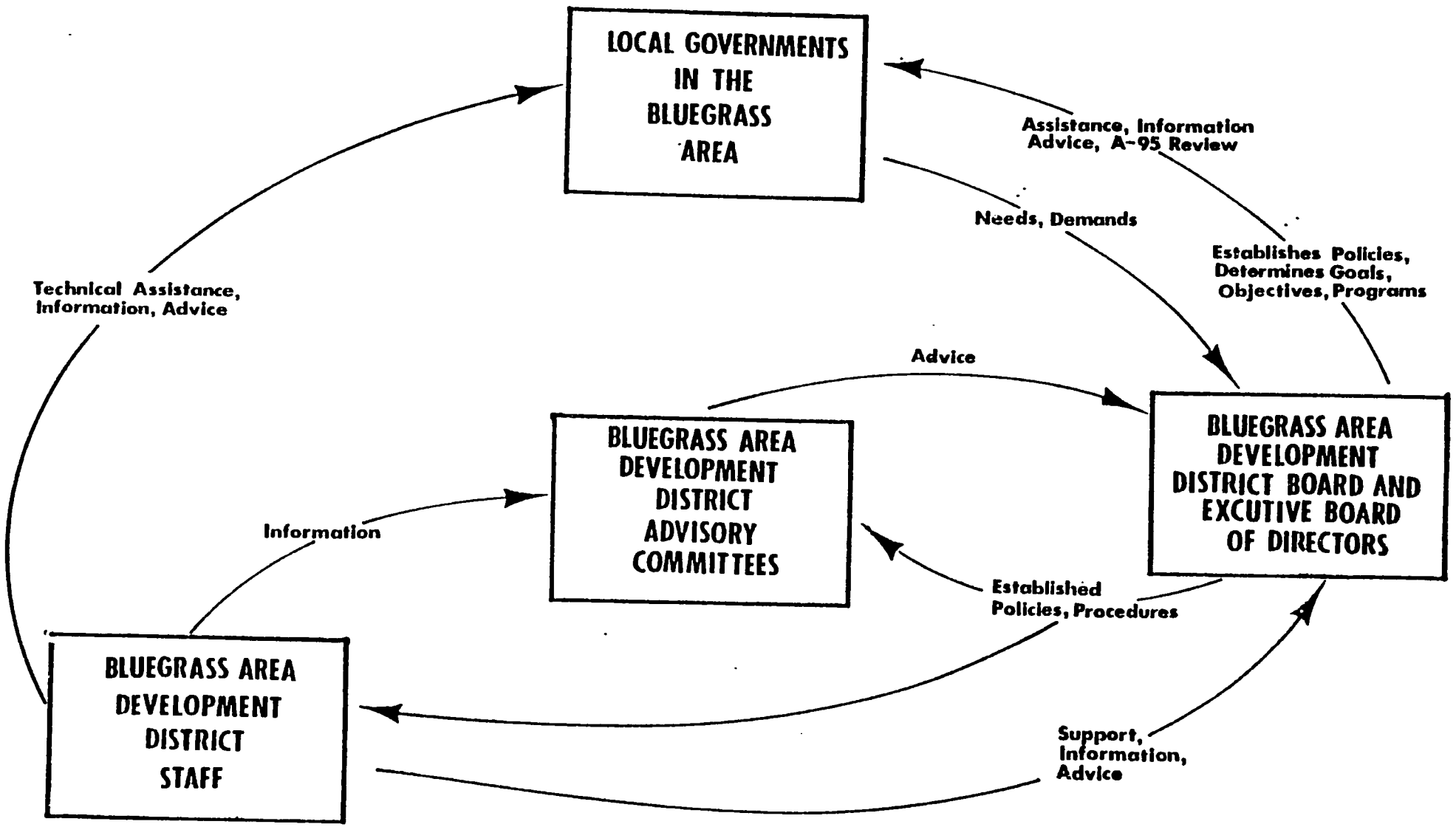


Figure 4

Section II

Operational Overview

Most of the activities of the Bluegrass Area Development District are carried out under the provisions of an annual District Work Program, the various parts of which are funded by different Federal and State grants. During Fiscal Year 1979, Bluegrass ADD will be performing the work outlined below. The Annual Work Program is described in terms of the source of funding.

Joint Funding Administration (JFA)

The JFA is essentially a dozen different grants combined into one. Various Federal and State agencies use the JFA as a means of combining funding, administrative and bookkeeping requirements, and scopes of work into a single program. The JFA grant is dividied into several "work objectives". Major work elements are:

--Element 110 Regional Development Strategies
This is the first phase of a multi-year program which will define regional goals and objectives and identify the means of realizing these. The goal of this program also is to combine planning in such areas as capital improvements, land use, economic development, etc. into a single, multi-purpose planning process.

--Element 120 Regional Planning Implementation
This element is comprised of 25 separate work tasks which will implement District plans through regional or local projects.

--Element 130 Regional Operations and Review
This element is composed of fifteen different work tasks. Element 130 seeks to support on-going District activities, as opposed to Element 120 which includes very specific projects designed to be accomplished within the current fiscal year.

--Element 140 Transportation
Under arrangements with the Kentucky Department of Transportation, the ADD is involved in a multi-year program of planning and technical assistance. This program consists of an inventory

of transportation alternatives (air, rail, highway), an analysis and evaluation of the alternatives, and development of a regional transportation plan based on the results of the analysis and evaluation.

--Element 150 Disaster and Emergency Services
This is the second year the ADD has been involved in this program area. "Emergency Operations Plans" are currently being prepared for three counties. The plans will identify resources, personnel and facilities to be used in the event of natural or man-made disaster. The plans also provide operational and organizational procedures to be used when necessary.

--Element 210 Manpower
This element provides a program of planning for the manower training needs in eleven District counties and of technical assistance in this program area. A Manpower Plan is prepared annually and efforts are continuous in seeking to implement its recommendations. This plan will include an assessment and analysis of the non-metropolitan labor market conditions, manpower needs, special skill needs, and a priority list of options designed to solve the unemployment problems in specified areas of the District.

--Element 220 Social Services Planning
Several activities are included in this work element. First, the Staff maintains and updates the "Human Services Directory" a comprehensive listing and description of all social services provided in the ADD. Coupled with this, the Staff provides training in the use of this directory. Secondly, "Problem Identification Reports", exposing social problems of the region, are prepared and submitted to the Kentucky Bureau for Social Services as a resource of information for the continued assessment of social needs and programs in the District. The reports additionally provide an evaluation of the effect of present programs on the needs and problems identified in prior "Problem Identification Reports".

--Element 230 Criminal Justice

The ADD is responsible for Criminal Justice Planning and the provision of technical assistance to its local governments. With the direction of the Criminal Justice and Public Safety Advisory Committee, the Staff prepares the District Criminal Justice Plan which identifies the problems, needs and opportunities of the Region's criminal

justice systems.

In addition to the JFA, the District receives funds from other sources to carry out its activities. Some of these funds, such as grants for Aging and Health Planning, are integral parts of the ADD's Annual Work Program. Others are projects undertaken by the District on a one-time basis and may not be expected to continue past the period for which the grant is awarded.

Aging

The Bluegrass ADD is designated as an Area Agency on Aging under provisions of the Older Americans Act. With assistance from the Aging Council, Staff provides technical assistance, advice, and planning for programs to meet the needs of the elderly citizens of the District.

Health

As part of its efforts to improve the social environment of the District's citizens, the ADD is involved in the planning and programming of health delivery systems. Staff provides local and regional comment and assistance to the Sub-Area Council of the East Kentucky Health Systems Agency. (The Sub-Area Council is a board consisting of representatives from counties in the area development district; the East Kentucky Health Systems Agency is the health program governing organization for the eastern half of the Commonwealth).

The Sub-Area Council reviews and comments on proposed health programs in its jurisdiction. Examples of typical programs include:

- the provision of primary health care facilities
- equipment purchases such as brain scanners, cancer detection and cancer treatment units

The Council's comments include consideration of the need for the program or equipment and a determination of conflict with or duplication of existing services within the new program's proposed service area. These comments are forwarded to the East Kentucky Health Systems Agency who makes similar comments, only with an area-wide perspective, to the state council for final action.

The Bluegrass ADD has the ability and flexibility to undertake programs which are not normally undertaken in its annual activities. The ADD can provide these additional programs because of the multi-discipline nature of the district staff which permits the combination

of several of the staff functions to effectively provide a new, temporary, staff division. The following list highlights several of the special programs in which the BGADD is currently involved:

Affirmative Action/Accounting Assistance

Through an Intergovernmental Personnel Act grant, the District is providing assistance to three cities and counties in the development and implementation of Affirmative Action programs. Assistance in establishing, and training in the use of, new accounting systems will be provided to public agencies in four counties.

The ADD involvement will insure that the Affirmative Action programs in the local government units will comply with Federal regulations and result in the provision of equal opportunities for its citizens to receive services, employment, and access to housing within the unit's jurisdiciton. The development of the new accounting systems will result in an efficient system for the receipt and disbursement of public funds.

The ADD's involvement in these programs is part of an effort to improve the management of member governments. These services are provided only on the request of the local government.

Enterprise Development

To continue its efforts to provide job-creating ventures, the ADD, through its Enterprise Development Specialist, assists both public agencies and private businesses in activities such as:

-industrial site selection
-plant expansions
-Federal and State grant assistance
-business planning and loans
-market surveys
-business forecasting
-manpower and job-skill availability reports

Coal Service Center Feasibility Study

Under a special Appalachian Regional Commission (ARC) grant, the District is studying the feasibility of a coal service related industrial park and a general purpose industrial park in one of the ADD cities. Included in this study will be market potential and operational feasibility studies for such facilities. The ADD's involvement in this program is to encourage the creation of employment opportunities through the creation of a data base on which prospective employers can readily access the city's transportation system, market potential,

manpower resources, and other factors related to their particular needs. The study will also provide the community leadership with information which is necessary to determine the industrial development potential of the community and the potential effect of development on the community's infra-structure and social environment.

Economic Adjustment Study

To offset the economic problems in two BGADD counties caused by high unemployment, plant closing, and threatened railroad abandonment, the ADD has prepared an "economic adjustment study". Submitted to the Economic Development Administration (See Section I), this study is the prerequisite for several applications for assistance currently being prepared. This study provides a program to be followed by the localities in adjusting to the problems and reversing the adverse impact of the economic decline. The study also catalogues recovery programs available to the localities and outlines the methods for obtaining the assistance.

Downtown Redevelopment

One BGADD city has contracted with the ADD to prepare, and assist in the implementation of, a program aimed at renovating the city's downtown business district. This plan will recommend architectural improvements, parking facilities, and other changes designed to stimulate the economy of the downtown. The plan also will provide the city with a blueprint to create an environment which is conducive to attracting new commercial enterprises to locate in the downtown. The aesthetic and shopper convenience improvements will attract shoppers to the downtown area and reduce the deterioration of the central business district as the center of commercial activity.

Section III

The Consortium

The Bluegrass Consortium, consisting of Eastern Kentucky University (EKU), Morehead State University (MSU), and the Bluegrass Area Development District (BGADD), was formed for the purpose of designing and developing a training program for the implementation of the Local Development Fund (LDF) envisioned by the Development Decentralization I project paper (DDI). The goal of DDI is to reinforce and strengthen decentralized local government. Its major purpose is to strengthen financial viability and development capability of selected village councils within Egypt through a small loan program (the Local Development Fund - LDF) operated by the professional staff of the Organization for Reconstruction and Development of Egyptian Villages (ORDEV), Ministry of Local Government, Arab Republic of Egypt. This program is funded by the Cairo Mission of the U.S. Agency for International Development (USAID). Loans will be made to elected village councils for small-scale industry projects which will be revenue generating and profit-producing. USAID/Cairo will provide a technical assistance team which will advise ORDEV in: (a) establishing a Local Development Fund (LDF) within ORDEV; (b) developing loan criteria; (c) selecting and training ORDEV and village-level personnel; (d) selecting ORDEV and village council staff for participant training; (3) developing assessment procedures concerning the profitability and equity characteristics of possible loan-supported enterprises; (f) installing loan development fund management system; and (g) establishing beneficiary analysis and impact assessment evaluation system.

The following training needs for the LDF operation have been identified by DDI:

1. Preparing trained Egyptians to staff the LDF emphasis of the ORDEV Academy as well as a field operations supportive of the LDF project;

2. Financial analysis feasibility and accounting skills for ORDEV personnel supporting the LDF project;

3. Business and economic skills related to the use of Special Account Funds for community and

business development in Egyptian villages;

4. Practical, applied project analysis skills for officials, elected councilors, and in some selected cases, entrepreneurs at the village level.

Training of ORDEV employees to function in the role of "General Development Officer" will be achieved through training in the four areas stated above.

The Bluegrass Consortium will provide a mix of academic and field training exposure for ORDEV personnel on an individual basis. Although the major portion of the training will be directed to the academic exposure, the field training or on-the-job training is a vital part of the program. The Consortium operating policy is based on the tenet that without the practical, day-to-day, exposure to development activities, the academic training will be less effective in achieving the overall goals and objectives of the training program.

ORDEV is similar in its mission to the lead agency of the Bluegrass Consortium, the Bluegrass Area Development District. Each organization has the purpose of improving the economic, physical, and social environments of local units of government. The Bluegrass Consortium will provide the necessary training program for ORDEV which will enable the Egyptian agency to benefit from the experience and techniques developed in past years.

The Bluegrass ADD will provide a field training experience for the ORDEV personnel which will complement the academic training to be provided by the university members of the Consortium. This field experience will closely follow the academic training by providing exposure to the implementation of principles of development and program management as it is conducted by BGADD staff members. (See Section II). When appropriate or necessary to realize the job goal, the BGADD will provide and coordinate activities with other private and public agencies which are involved in economic and community development related programs.

The Bluegrass ADD is involved on a regular basis with agencies at the federal, state and local levels of government. BGADD looks to the federal funding agencies as a resource for program development and program availability as well as a continuing source of information relating new methods and techniques of development. State agencies provide assistance to the ADD in a fashion similar to that provided by the federal agencies. The ADD/State relationship has been expanded to include a partnership approach to local development which is designed to achieve the mutual goal of improving the economic, physical, and

social environment of the citizens of the Commonwealth. The local units of government, both city and county are the recipients of the ADD's interaction with the federal and state levels of government. At the local level the programs, methods, and techniques are combined by BGADD to provide direct assistance and implementation of development orientated programs. The interaction among the different levels of government is demonstrative of interaction that can be expected to take place among the comparable levels of the Egyptian government, the Ministry, the Governorate, and Village. The field observation training will expose the ORDEV personnel to the relationship between and among different levels to provide a model of operation for the ORDEV operations.

Section IV

BGADD Operating Divisions

Each operational division of the Bluegrass ADD and virtually every professional staff member will be involved in the ORDEV training program. The major involvement will include the Management Services Department and the Department of Planning and Community Development with less emphasis placed on programs conducted by the Department of Social Services. The reduced emphasis on the Social Service Programs is due to the primary training emphasis on economic and community development programs. A description of each department's activities follows.

Department for Management Services

The primary goal of the Department of Management Services is to provide programs which will result in a logical and efficient expenditure of public monies by local governments. Consequently, a broad range of programs and activities are underway.

Departmental staff provides technical and advisory assistance to units of local government on all aspects of public management. Major areas of assistance include: budgeting, finance, personnel, purchasing, and local government law. This department is also responsible for planning and technical assistance in the areas of economic development, manpower, and natural resources. Staff support is also provided to the following advisory committees and councils: Development; Natural Resources and Environmental Protection; Manpower; and Tourism, Historic Preservation, and Recreation.

Because Management Services staff is involved in a cross-section of assistance to local government in the course of its daily operation, the ORDEV trainees will be exposed to the following Management Services activities:

Enterprise Development - efforts include the identification of programs to develop and to encourage the development of industrial sites, the location of new industries in the seventeen county area, and, in general, undertake activities which result in the creation and

expansion of jobs. Typical projects in this area involve the ADD in studies of:

1. site feasibility;
2. market feasibility;
3. transportation system analysis;
4. labor market analysis;
5. specialized support industry studies (e.g. coal service); and
6. data collection and analysis

Infra-structure Development - assistance within Management Services consists primarily of the identification of Federal and State loan and grant programs which assist ADD communities in the construction and/or upgrading of water and sewerage systems. Other activities in this general area involve staff in:

1. rate studies;
2. technical and management assistance; and
3. feasibility studies on the potential savings of system consolidation.

Local Government Technical Assistance - staff provides the ADD's cities and counties with advice and assistance in a variety of generalized areas.

1. Development of personnel policy and procedure manuals;
2. Design and implementation of centralized purchasing systems;
3. Cash flow studies and investment procedure programs; and
4. Assistance to local government in budget preparation and administration.

Department of Planning and Community Development

The mission of this department is to provide assistance in the planning and implementation of programs which will result in the orderly growth and development of local communities in the Area Development District. The staff activities involve the ADD in programs which have a profound effect in managing the long-term changes in the physical environment of the district's citizens.

In addition to providing graphics and mapping services to local communities and District Staff, this Department is involved in many other areas through its three component section:

Housing and Community Development - This section prepares housing plans, assists in the preparation of applications for housing projects, and provides general assistance in other housing-related matters. The other major area of responsibility of this section is Community Development Block Grants. Local governments are assisted in the preparation of applications for these funds and in administration of community development programs.

Land Use Section - This section is responsible for regional and local use planning activities conducted by the District. Additionally, assistance is provided to local communities in land use, zoning, subdivision regulations, and other planning-related matters such as community facilities assessments and housing stock inventory. Projections of growth and future development needs are also provided by Staff.

Transportation Section - This section, under arrangements with the Kentucky Department of Transportation, is responsible for carrying out multi-year regional transportation planning which will provide:

1. inventory of transportation alternatives (air, rail, highway);
2. an analysis and evaluation of the alternatives;
3. projection of future needs.

Exposure in this department will be concentrated in the Housing and Community Development and Land Use sections with little emphasis on the Transportation section.

The Land Use Section - Staff is involved in both special planning programs as well as on-going assistance to local governments and local planning commissions. Examples of the staff involvement include:

1. Comprehensive Plan updating to recognize and identify changes and departures from original comprehensive plans;
2. Base data collection for the development of both local and regional plans;
3. Resident planner program where a BGADD staff member serves one community as its full-time planner; and
4. Data collection and analysis as a support service for other ADD departments and local units of government.

Housing and Community Development - Activities involve staff in the process of need identification

and project development by matching the housing and development needs of a community with available funding programs. This section is in constant communication with Federal and State funding agencies to develop projects which will benefit member local governments. Among other activities, the Housing and Community Development section is involved in:

1. Development of housing rehabilitation and downtown renewal programs which involve a mix of federal/state/local funding;
2. Data gathering and analysis to determine ways and means of identifying and correcting housing deficiencies in the area development districts;
3. Assisting local units of government in application preparation for community development programs; and
4. Identification of need and application preparation under the low rent public housing programs.

Transportation Planning - encompasses a broad range of activities which concern the process of moving people, goods and services from one location to another in the most efficient and inexpensive fashion. On-going programs involve the staff in:

1. Regional transportation plans to meet the long range needs of the district which will be used to determine the programs necessary to provide reasonable transportation alternatives to citizens of the district. The alternatives include public transportation, rail service, improvements to existing highways and construction of new highways.
2. Analysis of commuter transportation patterns as part of the energy conservation program to reduce gasoline consumption by encouraging a "ride sharing" concept by identifying locations where commuters can meet and ride in groups thereby reducing the number of automobiles on roadways; and
3. Coordination with other sections and departments of the ADD and state government to determine future transportation needs identified by the comprehensive planning process which provides an analysis and projection in the areas of: land use (present and future), residential/industrial/commercial development, and an assesment of a communities infra-structure (present and future needs). The orderly growth and development of the district is the goal of the entire comprehensive planning process.

Department of Social Services

This department also has three operating sections which deal with the direct service programs provided by various federal/state funding agencies. The operating sections are:

Aging Section - Through its designation as the Area Agency on Aging, this section plans and coordinates a wide range of services for the elderly. Included in the elderly services are:

1. Nutrition programs which insures that the elderly have at least one balanced meal on a daily basis;
2. Homemaking and transportation services to prevent the placement of the elderly in institutions;
3. Generalized services such as legal and crime prevention programs to assist the elderly to function in the increasingly complex society; and
4. Grant fund administration for the operation of local aging programs in counties of the District; this section is responsible for providing assistance to these programs. This section also provides staff support to the Aging Council.

Health/Social Services Section - This section serves as staff for the Sub-Area Council, the district review organization on all health programs which provide both service and capital equipment purchases. The ADD's responsibility in this program area includes the compilation of social service needs in the district and an assessment of progress in the delivery of social services such as: the food stamp program, Medicaid (no cost health services), counseling of adults and children with special problems (See Section II).

Public Safety Section

This section is responsible for planning and technical assistance in the areas of criminal justice and disaster services. In addition, support is provided to the Criminal Justice and Public Safety Advisory Committee and to the District Disaster Preparedness Council. Currently staff is involved in communication system consolidation, fire service consolidation, improved police equipment programs. These efforts are designed to provide the district's citizens with an environment in which they are safer and more secure from harm. Additional efforts have involved staff in preparation of a disaster response plan. (See Section II)

Although the ORDEV participant/trainees will not be formally invovlved with this department, the ADD will schedule an overview of Social Services planning and programming for all participants in the training program. This approach is designed to briefly communicate the relationship of Social Services to the entire development process.

The overview will discuss the Aging Program, Nutritional Programs for the elderly and handicapped, the planning and implementation of health service delivery systems, and assistance provided to localities for the improvement of local law enforcement activities.

Other Private and Public Organizations

As time and scheduling permits, the ADD will provide the trainees with exposure to organizations with which the Bluegrass ADD has regular dealings and are involved in the economic/community development process. Additionally, several of the organizations listed below will be included as direct resources during the field training placements.

Kentucky Development Cabinet - The creation of productive jobs and increased income for all Kentuckians is the mission of this state agency. Included under its responsibility are the following executive departments and commissions:

1. Office of Developmental Planning
2. Governor's Economic Development Commission
3. Department of Commerce
4. Department of Agriculture
5. Kentucky Industrial Development Finance Authority

The Development Cabinet also serves as the state coordinator of funding programs of the Federal Appalachian Regional Commission and the Economic Development Administration.

U.S. Department of Agriculture - This Federal department is closely involved with the development of housing and economic development in rural areas. Its programs include loans and grants to local governments for infra-structure development and to individuals for agriculture related business ventures.

The Department also provides technical assistance to farmers through its network of county agents. The technical assistance provided is comprehensive and ranges from crop disease to livestock nutrition.

Local Government - Operations at this level are those that are the most visible to the citizens and directly affect the daily lives of those served. This level of government is the focal point of the programs, plans, and public agencies mentioned heretofore. The decisions on publicly financed projects are made at this level with BGADD assistance in interpreting the available information.

Community Development Agency (CDA) - This implementation agency is charged with the day-to-day execution of Federally funded community development projects. Typical projects include water and sewer improvements, housing rehabilitation, street/sidewalk improvements, and central business district renovation. The area development district provides a full range of technical assistance, management services, and project progress monitoring.

Kentucky Housing Corporation (KHC) - This state agency provides assistance to persons in the low-moderate income range via lower than market interest rate mortgages. In addition to single family housing, KHC provides assistance in the development of multi-family housing units which are available to low-moderate income families.

Department for Local Government (DLG) - This agency of state government provides numerous services to both units of local government and the area development district. It is the prime sponsor of all ADDs in the Commonwealth of Kentucky and monitors ADD activities. DLG also provides services directly to county governments in the areas of budget preparation and administration, in addition to data gathering, compilation and dissemination to other State, Federal and local agencies.

Small Business Administration - This Federal agency provides guaranteed loans to individual businessmen. These loans are made through private lending institutions directly to the individual with payment guaranteed by the Federal government.

Central Bank and Trust Company - This private lending institution in Lexington, Kentucky provides a full range of medium and short term loans to finance a variety of business enterprises throughout Central Kentucky.

Section V

On-The-Job Training

Due to the 30 day limit placed on the field training portion of the program, the major part of the field training will be conducted in the BGADD offices. Any outside agency placements will be of short duration and will be closely monitored by a staff specialist in the training area to be provided by the outside agency.

Exposure to the agencies listed in Section II will be provided in the course of normal staff consultation or involvement with them. Special arrangements will be made for exposure to agencies not contacted in the routine of daily activities. However, it is anticipated that all relevant operating agencies will be contacted during the 30 day field training placement.

Each ORDEV participant/trainee will be assigned a staff member who will serve in the capacity of contact person. This staff member may not be the trainee's placement supervisor and will provide advice to the trainee on matters relating to adjustment in an unfamiliar area.

The Project Director will make necessary training assignments to staff within the ADD organization. These assignments will be in accordance with the broad training objectives for the job goal. A written schedule of activities will be provided to each trainee and placement supervisor. Goals and objectives of the placement will be discussed fully with the trainee and the placement supervisor. The discussion will include a minimum: the purpose of the placement, desired exposure during the placement, relationship to the academic training and relationship to the job goal.

Field Training

In order to supplement the academic training received at the consortium universities, the trainee/participant will be exposed to the day-to-day skills necessary to function in a General Development Officer capacity. The trainee will be placed with individuals who, as part of their routine work assignments, are involved with the planning and development of economic/community development programs.

The six month academic program will familiarize the General Development Officer trainee/participant with the principles governing:

--Project identification and analysis
--Local government finance and management
--Public finance and banking
--Applied business skills
--Information flow and data management
--Local citizen participation
--Evaluation and research
--Production and marketing systems

Field training for the General Development Officer will involve:

1. Placement - BGADD (Department of Planning and Community Development)
   Duration - Ten days
   Exposure - Project management and monitoring; community development program planning; demographic data collection and analysis; secondary placement with an operating agency (community development agency); project execution; citizen participation in the planning and implementation of community development programs; transportation planning for industrial site access; land use planning.

2. Placement - BGADD (Management Services)
   Duration - Fifteen days
   Exposure - Industrial site selection; medium-size manufacturing operations; agri-business (through the Department of Agriculture Extension Service); market analysis; transportation analysis; infra-structure planning; market feasibility studies; manpower and demographic data analysis; project packaging; general management assistance to local government.

3. Placement - BGADD (Project Director)
   Duration - Five days
   Exposure - Overview of Department of Social Services; general view of other ADD function; citizen involvement in the advisory committee system; public information systems; opportunity to repeat other placements.

The field experience outlined above is designed to provide a dynamic exposure process; varying schedules of staff and unscheduled events can be adjusted by the project director if necessary. The placements may not follow the order set out above but all exposures for the job goal will be provided during the placement.

During the field training portion of the ORDEV Local Development Fund Training Program, each participant will be closely monitored by the project director. This progress monitoring is designed to ensure that the placements are providing the exposure to the operating elements scheduled. In addition to verbal communication, a participant progress sheet will be maintained on a weekly basis by the project director.

The progress sheet will note:

1. the participant's adjustment to the placement in terms of interest, ability to relate the field experience to the academic training, and increase in overall working knowledge.
2. the participant's opinion of the placement as it relates to the academic training.
3. the placement supervisor's assessment of the placement as it relates to the academic training.

The participant progress sheet will be made a part of the trainee's record. (See Report Four.)

During the field training experience at Bluegrass ADD, consideration will be given to Friday as the Moslem holy day. Friday activities will consist of a morning seminar which will include the project director, placement supervisors and participant trainees. This seminar will afford the participants and staff an opportunity to share placement experiences; discuss problems encountered and possible solutions; and make changes in placement length or emphasis if necessary. Friday afternoons will be unscheduled to permit the trainees to pursue their personal activities in accordance with their religion.

The provision of the free time on Fridays is not detrimental to the training goals and objectives. The actual training hours lost will be accounted for in night and occasional Saturday meetings. Additionally, the cross-cultural exposure aspect of the training will, in all likelihood, take place on week-ends.

APPENDIX A

BY-LAWS OF THE BLUEGRASS AREA DEVELOPMENT DISTRICT, INCORPORATED

ARTICLE I

NAME, AREA, AND PURPOSE

Section 1: Name

This organization shall be known as the Bluegrass Area Development District, Inc., (hereinafter called ADD), a non-profit corporation duly incorporated and existing under and by virtue of the laws of the Commonwealth of Kentucky.

Section 2: Area

The area comprising the Bluegrass Area Development District shall include the counties of Anderson, Bourbon, Boyle, Clark, Estill, Fayette, Franklin, Garrard, Harrison, Jessamine, Lincoln, Madison, Mercer, Nicholas, Powell, Scott, and Woodford Counties (hereinafter called the Area).

Section 3: Purpose

The primary purpose of the ADD shall be to plan, promote, and encourage the comprehensive development of the Area's resources including but not limited to community services, transportation, health, education, human and natural resources.

ARTICLE II

MEMBERSHIP

Section 1: Membership

Membership in this organization shall consist of such persons or organizations of the Area who are interested in and are willing to give of their time and talents to promote the objectives and purposes of the ADD. Any resident of the area, 18 years of age or older, can participate as a member of the ADD upon expressing a desire to participate, establishing an attendance record by attending two (2) consecutive meetings, and having actively demonstrated an interest in comprehensive development of the area in furtherance of Article I.

Section 2: Function

The membership of the Bluegrass Area Development District shall be kept as broadly based as feasible. It shall function in an advisory open forum capacity. The District membership may suggest to the Board of Directors certain policies, programs, areas of opportunity, and ideas pertaining to the comprehensive development of the area. Members of the Development District may become members of and serve on committees for study, consultations, and recommendations to the Board of Directors and/or Executive Board of Directors.

Section 3: Member Representation

It shall be an objective of the ADD to maintain as broadly based a membership as possible. To attain this objective it shall be the responsibility of the members of the General Board of Directors to encourage, solicit, and request the attendance and participation of persons from all segments of their community's society and economy.

Section 4: Voting Membership

Each person who meets qualifications of a member as set forth in Article II, Section 1, shall be entitled to one vote on any matter brought before the Membership but not before the Board of Directors. If the credentials of any person are questioned, the Membership shall determine by majority vote the right of that person to vote.

Section 5: Ex-Officio Members (Non-voting)

Representatives of Federal, State, or private agencies or organizations who express a desire or interest to participate in a technical and/or advisory capacity to the general membership and/or the General Board of Directors and/or the Executive Board of Directors shall be encouraged to participate as ex-officio non-voting members. All area resource workers will be involved and encouraged to participate. Any and all staff members employed by the Development District will also serve in this capacity.

Section 6: Official Register of Membership

The Secretary of the General Board of Directors shall keep an Official Register of all voting members and Ex-Officio members.

ARTICLE III

BOARD OF DIRECTORS

Section 1: Composition of the Board of Directors

The General Board of Directors shall be the governing and policy-making body of the ADD. The General Board shall total seventy-three (73) persons and shall be composed of or elected as follows:

A. The County Judge of each county or his designee. (The designee shall be a member of the Fiscal Court and his votes and commitments shall be binding upon the official he or she represents.)

B. The mayor or his designee from each of the participating counties. In counties where there exists a first, second, or third class city as well as other cities of lower class designation, the mayor of the first, second or third class city and a mayor of one other city or their designee shall be represented on the Board. (The designee shall be a member of the city commission/council and his votes and commitments shall be binding upon the official he or she represents.) All remaining mayors in the Area not elected to the Board of Directors may serve as Ex-Officio members without the right to vote or hold office on the Board.

C. Thirty-six (36) citizen directors who will be representative of the diverse social and economic interests of the Area including, but not limited to:

1. Agriculture
2. Chambers of Commerce
3. Civic Organizations
4. Clergy or Religious Groups
5. Community Development Associations
6. Homemakers or Consumer Groups
7. Insurance, Banking and Finance
8. Labor Organizations
9. Land Developers, Real Estate, and Property Management Associations
10. Legal, Architectural, Engineering, and Planning Professions
11. Manufacturing
12. Medical Organizations and Associations
13. Minority Groups
14. Poor, Unemployed, and Underemployed
15. Printed and Electronic News Media
16. Public or Private School Systems
17. Transportation
18. Utilities
19. Wholesale and Retail Commerce
20. Youth Organizations
21. Women

Of the thirty-six (36) citizen directors, one shall be the Chairman of the Bluegrass Subarea Health Council, or his designee, and one citizen director shall be an at-large representative.

D. The board members consisting of the mayors and county judges shall nominate and accept nominees from the above groups. The board members by majority vote shall elect from the nominees citizen directors and, in so doing, they shall assure a desirable mix of socioeconomic interest and proper geographic distribution according to Section 2 below.

E. Because the involvement of the victims of economic and racial discrimination relate directly to the effectiveness of the ADD in attaining its purpose in Article 1, Section 2, there shall be representation of the poor, unemployed, or underemployed and representation of the interests of the minority sector of the society.

F. The chairman of each standing committee must be a member of the General Board of Directors (see Article VII, Section 1).

G. Appointments of all above named designees shall be made in writing.

Section 2: <u>Geographic Distribution of Directors</u>

Each county shall have at least two (2) public officials and two (2) citizens on the ADD Board. (For purposes of this Section, the Chairman, or his designee of the Bluegrass Subarea Health Council, shall be considered an at-large citizen director and shall not be counted as representing his county of residence, nor shall the at-large member provided for above in Paragraph C, Section 1.)

Section 3: Term of Office

In the case of public officials - Mayors and County Judges - the terms of office as Directors on the ADD Board shall coincide with their elective term of office. Citizen members shall serve terms of three (3) years to expire on the day of the Annual Meeting of the membership.

Section 4: Powers and Duties of the General Board

The General Board of Directors shall regulate and supervise the management and operation of the Development District. It shall attend to arrangements for carrying on the operation in a businesslike manner. The General Board of Directors shall have the responsibility of developing policies under which the Development District shall function. All policies accepted by the General Board of Directors shall be prepared in written form and communicated to the Development District membership.

Section 5: Removal of Directors

Any Director may be removed at any time, for cause, by a simple 2/3 majority vote of the General Board provided he or she has been notified at least thirty (30) days in advance of such action. Notification must specify cause and date, time, and place of pending action and must be delivered by registered mail. Removal may be initiated by any Director. Cause for removal is deemed to include:

A. Direct conflict of interest.
B. Violation of law applicable to this organization
C. Conduct unbecoming a Director of this organization or prejudicial to its purpose in Article 1, Section 3, hereinabove, or
D. Failure to attend two (2) consecutive meetings.

Section 6: Filling of Vacancies

Any vacancy of a Mayor or Judge designee on the General Board, however occasional, shall be filled by appointment of the relevant Judge or Mayor. If the Director is a County Judge or Mayor, his legally appointed or elected successor shall replace him on the Board. If the vacancy shall be filled by nomination and election by a majority of the existing General Board providing the nominee resides in the county in which the vacancy occurs. In the event that less than one hundred twenty (120) days remain in the term of office vacated, the remaining term may be left vacant.

ARTICLE IV

BOARD OF DIRECTORS MEETING

Section 1: Annual Meeting

The Annual Meeting of the Board shall be conducted during the month of January at a date, time and place as may be designated by the Executive Board.

Section 2: Regular Meetings

Meetings of the General Board shall be scheduled and such meetings shall be held quarterly at such a date, time, and place in the District as prescribed by the notice of said meeting, with the Annual Meeting counting as one of these regular meetings. At all General and properly called Board meetings a simple majority of all Directors, including one officer present, shall be necessary to constitute a quorum to transact business, but any lesser number shall be sufficient to adjourn a meeting. If a vacancy occurs for any reason, the remaining Directors shall be the basis for determining a quorum.

Section 3: Special Meetings

Special Meetings of the General Board shall be held on the call of the Chairman of the Board or any fifteen (15) members of the Board. The time, place, date, and purpose of said Special Meeting shall be as designated by the notice of said meeting and said notice shall be given by first class mail at least forty-eight (48) hours prior to the meeting.

Section 4: Notice Requirement

Notice of the Annual Meeting and other Regular Meetings shall be mailed to each Director not less than seven (7) days prior to the meeting. This notice shall be sent by the Board Chairman, Secretary, or staff by first class mail to the address appearing on the Official Register and said act shall be deemed as compliance with the notice requirement.

Section 5: Attendance Requirement

Any Director missing two (2) consecutive meetings shall be contacted by the Chairman of the Board or a person or committee appointed by the Chairman and they shall determine the reason for his absence and his intention to continue his activities on the Board. A report shall be given the Board of Directors at their Regular Meeting or Special Meeting at which time the Board may declare a vacancy and, if a vacancy is declared, then the procedure as outlined heretofore in filling vacancies shall be in effect.

ARTICLE V

EXECUTIVE BOARD OF DIRECTORS

Section 1: Composition of the Executive Board of Directors

The Executive Board of Directors shall have full power of the General Board and shall carry out the policies of the General Board and direct the activities of the Executive Director and the staff of the ADD. The Executive Board shall total seventeen (17) persons and shall be composed of or elected as follows:

A. The Officers of the General Board shall serve as Officers of the Executive Board and constitute four (4) of the seventeen members of the Executive Board.

B. The Executive Board shall be composed of nine (9) elected officials and eight (8) citizen board members.

C. Term of office of members of the Executive Board shall coincide with membership on the General Board as provided in Article III, Section 3. (The Executive Board shall have one and only one member from each of the seventeen counties of the Area and shall be chosen from the Directors of the General Board.)

D. A quorum of the Executive Board shall consist of nine (9) members, including at least one officer.

Section 2: Responsibilities of the Executive Board

The purpose of the Executive Board is to provide the General Board with orderly management of routine business. It shall be within the Executive Board's authority and power to oversee and/or conduct the normal and recurring business fo the Board including approval of the payment of: authorized staff salaries, official travel expense, expenditures for office supplies and materials, telephone and utility bills, rent payment--if any, authorized employee insurance and retirement benefit premium, withholding taxes, e.g. federal and city and state income tax, social secruity taxes, and the like. Payments which have not received prior approval shall be considered for post approval by the Executive Board. Expenditures not generally covered by the items listed above shall require prior authorization for payment by the Executive Board. The Executive Board shall furnish the General Board a quarterly and annual financial statement and they shall see that the Annual Audit or other audits are completed as required by these By-Laws and/or Board directive. The Executive Board shall function as the official screening body for all administrative and/or professional applicants seeking positions authorized by the Board. The Executive Board shall make appointments from the list of candidates so qualified, determine their salaries within budget limitations, and retain the power of dismissal. Non-professional and/or non-administrative personnel whose positions are authorized by the Board may be employed or dismissed by the Executive Director without further action by the Board and/or its Officers. Dismissals shall be usually based on grounds of neglect of duties, inefficiency, insubordination, malfeasance and/or conflict of interest. The Executive Board shall have other powers and duties as may be specified by the General Board of Directors.

ARTICLE VI

EXECUTIVE BOARD OF DIRECTORS MEETING

Section 1: Regular Meetings

Regular Meetings of the Executive Board shall be scheduled and such meetings shall be held at 7:00 PM on the third Wednesday of each month or at such date, time, and place in the District as prescribed by the notice of said meeting. At all Executive Board Meetings a simple majority of all Directors, including one Officer present, shall be necessary to constitute a quorum to transact business, but a lesser number shall be sufficient to adjourn a meeting. If a vacancy occurs for any reason, the Chairman of the Board may appoint a Director to the Executive Board from the existing General Board providing the appointee resides in the county in which the vacancy occurs and the appointment is made within the confines of requirements for Executive Board of Directors to maintain elective and citizen balance. Term of this appointment is the remainder of the term of the member who was replaced.

Section 2: Special Meetings

Special Meetings of the Executive Board will be held on the call of the Chairman or nine (9) members of the Board. The time, place, date, and purpose of said Special Meeting shall be as designated by the notice of said meeting and said notice shall be given by first class mail at least forty-eight (48) hours prior to the meeting. Depositing such notice, duly stamped, sent first class mail, and addressed to a Director at his address recorded on the Official Register shall be deemed as compliance with the notice requirements.

Section 3: Notice Requirement

Notice of the Annual Meeting and Regular Meetings shall be mailed to each Director not less than seven (7) days prior to the meeting. This notice shall be sent by the Board's staff by first class mail to the address appearing on the Official Register and said act shall be deemed as compliance with the notice requirement.

Section 4: Attendance Requirement

Any Director missing three (3) consecutive meetings shall be contacted by the Chairman of the Board or a person or committee appointed by the Chairman and they shall determine the reason for his absence and his intention to continue his activities on the Board. A report shall be given the Board of Directors at their Regular Meeting or Special Meeting at which time the Board may declare a vacancy and, if a vacancy is declared, then the procedure as outlined heretofore in filling vacancies shall be in effect.

ARTICLE VII

OFFICERS

Section 1: Officers of the Board

The Officers of the Board of Directors shall be a Chairman of the Board, Vice-Chairman of the Board, Secretary, Treasurer, and such other officers as the Board of Directors may deem advisable. Officers of the Board shall also serve as Officers of the membership and the Executive Board. The Officers may serve as Ex-Officio members of the Standing Committees.

Section 2: Election of Officers and Term of Office

The Officers shall be elected by the General Board at their Annual Meeting and they shall hold office for one (1) year or until their successors have been elected and qualified; however, if the General Board shall decide to name another officer in accordance with its privileges outlined heretofore in the By-Laws, the General Board may provide when and for what term he shall be elected. In the event of a vacancy occurring during the period for which an officer has been elected the Board shall fill such a vacancy at the next Regular Meeting or sooner at a Special Meeting of the Board, Any officer elected or appointed by the Board may succeed themselves in office, not to exceed more than two (2) successive terms.

Section 3: Removal of an Officer

An officer or administrative or professional employee of the Executive Board may be removed for inefficiency, malfeasance, or conflict of interest at any time by the majority vote of the entire membership of the Board of Directors provided that written charges are submitted to him within thirty (30) days prior to such action and he be given a chance to plead his case. The person so removed shall have a right of appeal to the Circuit Court.

Section 4: Eligibility of Officers

Any Director of the Board shall be eligible to hold office.

Section 5: Expenses

Payment of expenses of the Officers and of the Directors shall be determined and subject to authorization by the Executive Board.

ARTICLE VIII

DUTIES OF THE OFFICERS OF BOARD OF DIRECTORS

Section 1: Chairman of the Board

The Chairman shall be the chief executive of the General Board of Directors and the Executive Board of Directors. He shall preside at all meetings of the Directors. He shall have general and active management of the business of the Board and shall see that all orders, policies, and resolutions of the Board of Directors are carried into effect. He shall also perform other duties as may from time to time be delegated to him by the Board.

Section 2: Vice-Chairman of the Board

The Vice-Chairman shall preside at meetings of the General Board of Director or the Executive Board of Directors in the event of the Chairman's absence, illness, absence from the state, or inability to perform his duties. He shall also assume all the responsibilities of the Chairman as herein enumerated in the event the Chairman is ill, absent, or otherwise unable to perform. He shall also perform duties as may from time to time be delegated to him by the Chairman of the Board.

Section 3: Secretary of the Board

The Secretary shall keep the records of the General Board and Executive Board, the minutes of the meetings of the Boards, and the Official Register of the membership, the General Board of Directors, and the Executive Board of Directors. The Secretary shall notify officers, committees, and delegates of their elections and appointments. He shall read the minutes of each business session. The Secretary may delegate any and all of these duties to a member of the staff if he so desires; however, such delegation does not relieve the Secretary of his responsibilities. He shall also perform duties as may from time to time be delegated by the Board.

Section 4: Treasurer of the Board

The Treasurer shall be the custodian of all moneys and securities of the ADD and shall provide for the accurate keeping of regular books of account of ADD funds and properties. He shall also perform duties as may from time to time be delegated to him by the Board.

Section 5: Administrative Officers and Staff

The Executive Board may employ personnel and contract with other persons as it deems necessary to carry out the goals, objectives, programs, and duties assigned to it by virtue of these By-Laws, Charter, and the Laws of the Commonwealth of Kentucky. The Chief Administrative Officer shall be the Executive Director who shall be appointed by the Board to administer, direct, implement, and otherwise carry out the functions and duties of this organization. The Executive Director will implement the policies and programs of the Board and shall recommend to the Board on such matters as budget, staff policies and appointments, programs, contracts, studies, organization, and other such matters of direct concern to the Board. The Executive Director shall also serve as an ex-officio member of the five standing committees. Other administrative and/or progessional level employees of the Board as well as paraprofessionals and clerical employees shall be under the direct supervision if and responsible to the Executive Director. The Executive Board with the advice of the Executive Director shall adopt work rules and policies to govern the staff operations and functions.

ARTICLE IX

COMMITTEES

Section 1: Standing Committees

A. Committees Authorized; Meetings

The Board of Directors shall function normally through the reports and recommendations of its Standing Committees which shall include, but not be limited to, a Human Resources Committee; Education Committee; Natural Resources and Environmental Protection Committee; Transportation Committee; Development Committee; Tourism, Historic Preservation, and Recreation Committee; Criminal Justice Committee; and Health Committee.

The Committee Chairman may call the Committee however, the Committee shall conduct business at least once every two months at a place, time and date designated by advance notice as determined by each Committee.

B. Committee Membership

The Board of Directors shall by majority vote appoint all members of Standing Committees. Nominations for those members representing a specific geographic area shall be made by General Board members representing that area. Notices of vacancies in Committee membership shall be sent to the General Board members representing the area in which the vacancy exists. Should there be no response from these Board members within thirty (30)

days, the Committee itself may nominate persons for membership. Membership on each Standing Committee shall be composed of Directors and those persons from the area who are willing to serve and contribute to the purpose of the ADD.

C. Committee Composition

Each Committee shall have a Chairman, Vice Chairman and other such officers as deemed necessary by the Committee. The Chairman of each committee shall be a member of the Board, appointed by the Chairman of the Board, with the consent of the Executive Board. Other officers of each committee shall be chosen by the members of that committee.

Membership on each committee shall total at least twenty-three (23) members with all participating counties in the district as well as interest groups being represented. A county shall be entitled to representation according to its population in the most recent U.S. Census by the following formula:

First - 25,000 Population or fraction thereof - 1 member
Next - 25,000 Population or fraction thereof - 1 member
Next - 50,000 Population or fraction thereof - 1 member
Next - 50,000 Population or fraction thereof - 1 member
All Over - 150,000 Population or fraction thereof - 1 member

At-large voting members - not to exceed ten - may be included on the Committee to represent a wide cross-section of interests. At-large members may be nominated by other Committee members or any member of the Board of Directors.

Section 2: Standing Committee By-laws

All Standing Committees shall operate under By-laws to be approved by the Executive Board.

Section 3: Committee Actions

Recommendations and other actions of committees established under this Article are not binding on the Board of Directors until adopted by that body or the Executive Board.

Section 4: Ad Hoc Committees

The Board of Directors may appoint special prupose or Ad Hoc Committees which shall be terminated at such time deemed appropriate by the Board.

ARTICLE X

DEPOSITS, DISBURSEMENTS, BOND, AND AUDIT

Section 1: Deposits

Deposits to the credit of the ADD of all notes, moneys, valuables, checks, drafts, bonds, and other instruments received by the ADD shall be made in such banks and depositories as the Executive Board may from time to time designate. All such deposits shall be made in a manner as prescribed by resolution of the Board.

Section 2: Disbursements

Disbursements of funds of the Board for expenditures as generally or specifically authorized or appropriated by the Board shall require the signature of the Treasurer and either the Chairman or Executive Director. Those things not receiving prior approval shall receive consideration for post-approval in the manner as prescribed by these By-Laws or Board Resolution. Payment shall be made by taking proper vouchers thereof. Consideration for approval by the General Board and/or Executive Board shall be given to quarterly, semi-annual, and annual financial statements.

Section 3: Bonding Required

Any Officer or employee of the Board handling money or securities of the ADD shall be bonded at the Board's expense in the amount as determined by the Board and/or laws of the Commonwealth of Kentucky.

Section 4: Audit

It shall be the duty of the General Board of Directors, prior to Annual Meeting thereof, or at such other time as requested by the Board, to appoint a public accountant, not an employee of the Board or a Board member, to examine and audit the accounts of the Bluegrass Area Development District, Incorporated.

ARTICLE XI

RATIFICATION, AMENDMENTS, AND EFFECTIVE DATE

Section 1: Ratification

Whenever an Officer, Committee, and/or employee of the Board forms an act and/or function in the name of the Board as may be lawful by these By-Laws, Charter, Laws of the Commonwealth of Kentucky and/or authorization and/or appropriation of the Board, such acts or performance of such functions may be ratified by the Board, if such ratification is specifically required, either at a meeting of the Board or by mail provided that a majority of the entire membership of the Board place their signatures on a statement of ratification which is mailed to all members of the Board. Ratification by mail may be used upon the approval of the Chairman, Executive Board, and/or General Board. Results of such poll-by-mail shall be recorded in the minutes of the next regular meeting of the Board.

Section 2: Amendments

Amendments to these By-Laws shall be made by adoption by simple majority of the entire membership of the General Board provided such amendments have been submitted to the Executive Board for review prior to enactment and further provided that all proposed changes are distributed to the entire membership of the Board by first class mail at least seven (7) days prior to the meeting at which said amendments are scheduled to be acted upon. Compliance with this notice requirement only shall require the deposit of said notice in the mail giving the address of each Director as shown on the Official Register.

Section 3: Effective Date of Adoption

These By-Laws shall be in effect immediately upon adoption by a majority of the County Judges and Mayors who are members of the Board. Subsequent amendments to these By-Laws shall become effective immediately upon their adoption by a majority of the entire membership of the Board as prescribed herein.

Adopted on _____ by
Resolution of the Board of Directors

_____ (s)
Chairman of the Board

Attest:

_____ (s)
Secretary of the Board

Revised on March 30, 1979 by unanimous
vote of the Board of Directors

_____ (s)
Chairman of the Board

Attest: _____
Secretary of the Board

PD-AAJ-380-C

BLUEGRASS CONSORTIUM
REPORT FOUR
ORDEV TRAINING PROGRAM
CONSORTIUM MANAGEMENT
BLUEGRASS AREA DEVELOPMENT DISTRICT
August, 1979

The preparation of this
document was financed
with funds received in a
grant from the U.S.
Agency for International
Development, Cairo Mission

Introduction

Report Four, Consortium Management, is the last of a series of reports developed by the Bluegrass Consortium. This report outlines the management system to be used in providing the training for ORDEV participants.

In addition to the operating system, estimated budgets for the five-year program are included in this report. Detailed budget figures will be developed prior to negotiation for the five-year program contract if required by the USAID/Cairo Mission.

Report Four

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Appendices

A. Trainee Placement Sheet

B. Bluegrass Area Development District Budget

C. Eastern Kentucky University Budget

D. Morehead State University Budget

Section I

Training Facilities

In providing a training program of this type, the physical training environment and training staff is important to the success of the methodology and content of the program. The facilities must provide the trainee with surroundings which are comfortable, quiet, and spacious enough to encourage maximum concentration during the academic component of the training. The training environment during the field exposure must provide an office atmosphere which encourages the orderly conduct of daily business activities.

The training staff, in addition to its technical and professional expertise, must be sensitive to the cultural and religious differences of participants in the training program. The Consortium Project Director will provide pre-training staff orientation sessions to insure that all staff involved in the ORDEV program will be sensitive to the trainee needs. This orientation will include the following information on the Arab Republic of Egypt:

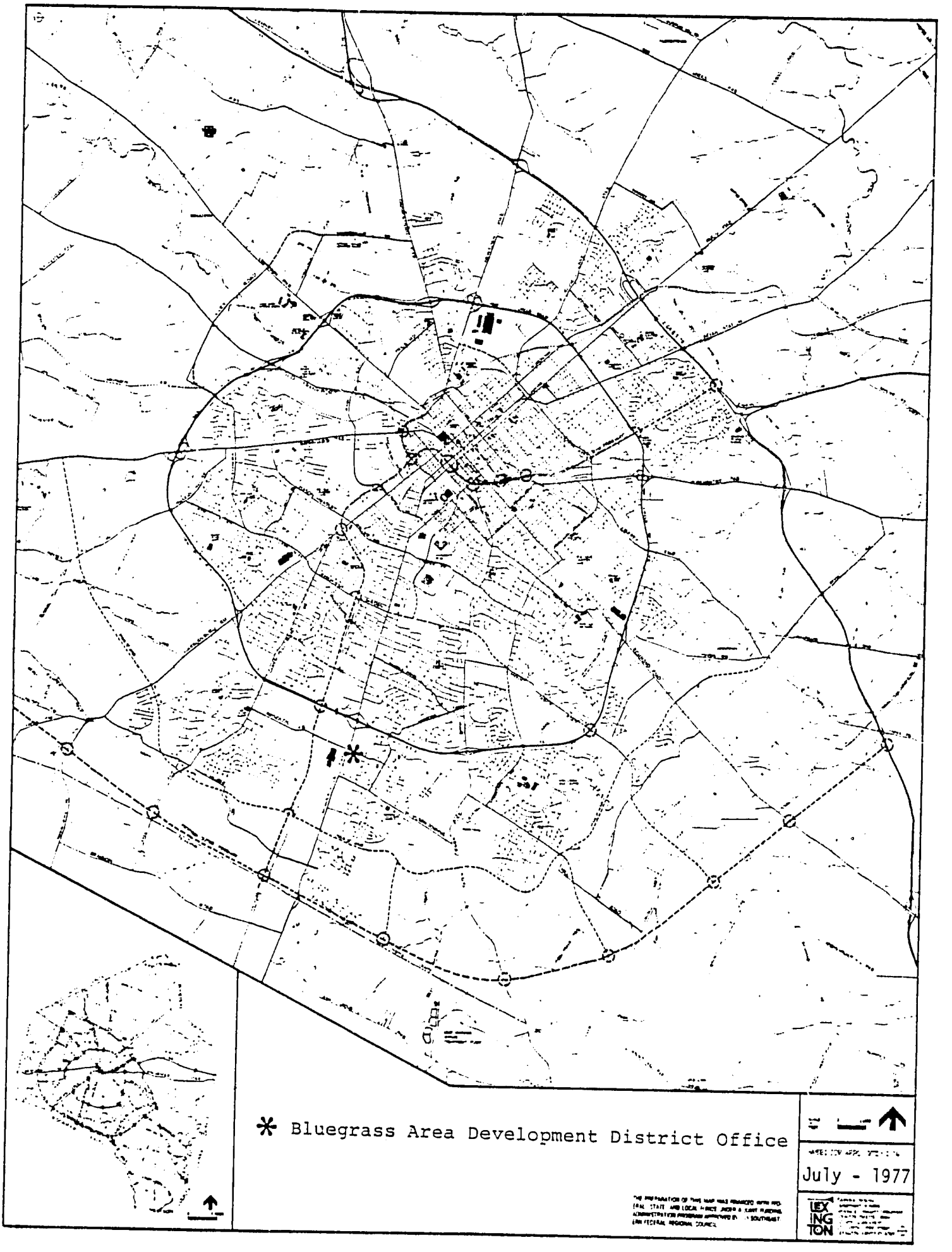
1. Climate and geography of the country
2. Recent political history
3. Recent social programs and history
4. Religious history
5. Characteristics of developing nations

These orientations will be in addition to specific individual staff training and orientation to the training program as outlined in Report Three, Section V.

The residential environment provided to the trainees must give consideration to the personal needs of participants in the areas of privacy and comfort. Cooking facilities, private bedrooms, and common living/eating facilities are also important considerations when providing the residential environment. The facilities available to the Consortium members are adequate to meet the needs of the training program. A brief description of each member's facilities follows.

Bluegrass Area Development District (BGADD)

The Area Development District offices are located on the south side of Lexington, Kentucky, the central


* Bluegrass Area Development District Office
July - 1977
LEX
ING
TON

city of the Bluegrass region (Figure 1). Office space to accomodate trainees during the field training exposure will be provided in:

1. the office of the trainee's field placement supervisor and
2. a section of the Area Development District conference room.

These facilities will meet the office atmosphere criteria set out above.

The Bluegrass ADD staff consists of 30 professionals in a variety of disciplines (See Report Three, Section I). The professional staff is augmented by more than ten secretarial and clerical staff members. All professional staff members will receive the general orientation program outlined above; professional staff members who will be directly involved will receive specific orientation to the training program. This orientation will include:

1. purpose and history of the ORDEV Training Program;
2. individual staff responsibilities in the field training component; and
3. academic and field training objectives as they relate to the four job goals.

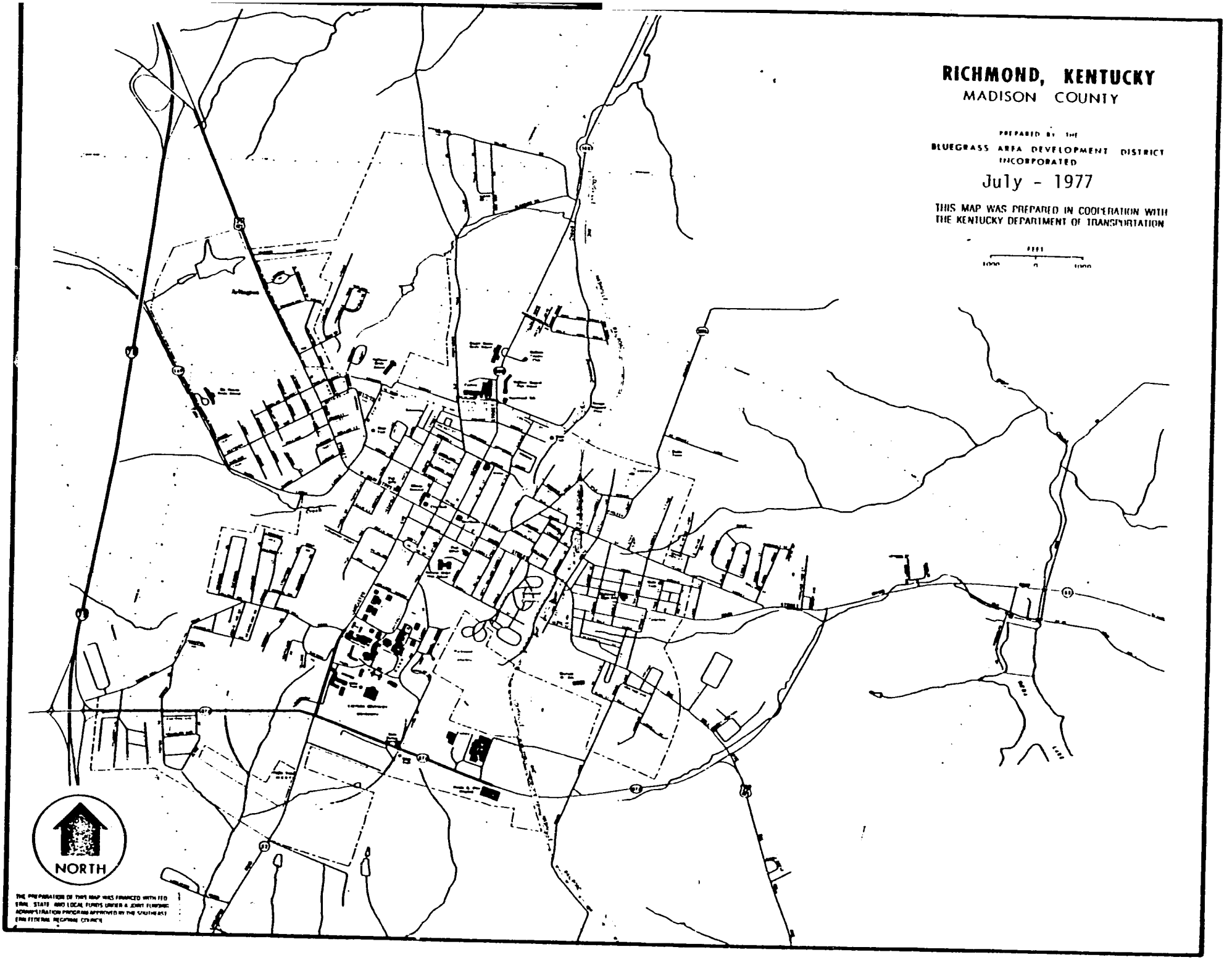
Residential facilities will be provided on a short-term rental arrangement with apartment owners in a radius of one-half mile of the ADD offices. Approximately, 500 units ranging from efficieny apartments with cooking facilities to three bedroom apartments with full cooking and "living room" space separate from the sleeping area are available. Furnished apartment units are available in the radius named above.

Public transportation via bus and taxi are available on a regular basis between the ADD offices and the residential area. The same transportation system is available on a regular basis between the residential area and the downtown commercial area where shopping and entertainment areas, similar facilities are available within a short distance of residential area.

Eastern Kentucky University (EKU)

The EKU campus is located approximately 30 miles to the south of Lexington in Richmond, Kentucky. The campus is on the outer perimeter of Richmond and is easily accessable to the downtown and commercial area (Figure 2).

Eastern Kentucky University has modern, fully equipped classroom facilities available to provide the


RICHMOND, KENTUCKY
MADISON COUNTY
PREPARED BY THE
BLUEGRASS AREA DEVELOPMENT DISTRICT
INCORPORATED
July - 1977
THIS MAP WAS PREPARED IN COOPERATION WITH
THE KENTUCKY DEPARTMENT OF TRANSPORTATION
NORTH

training environment outlined above. Modern support equipment is available to the training staff including computor facilities, audio-visual equipment, and video tape facilities.

Twenty faculty members from the Department of Political Science and the School of Business have been designated as members of the academic training team (See Report One, Appendix A). These instructors represent a cross-section of academic expertise including business management, accounting, development economics, information systems, organization development and theory, marketing, computer science and political science. The faculty will participate in pre-training orientation sessions designed to provide background information on the Arab Republic of Egypt. (The topics included in the orientation sessions will be those set out above.) These sessions will be conducted by the Consortium Project Director.

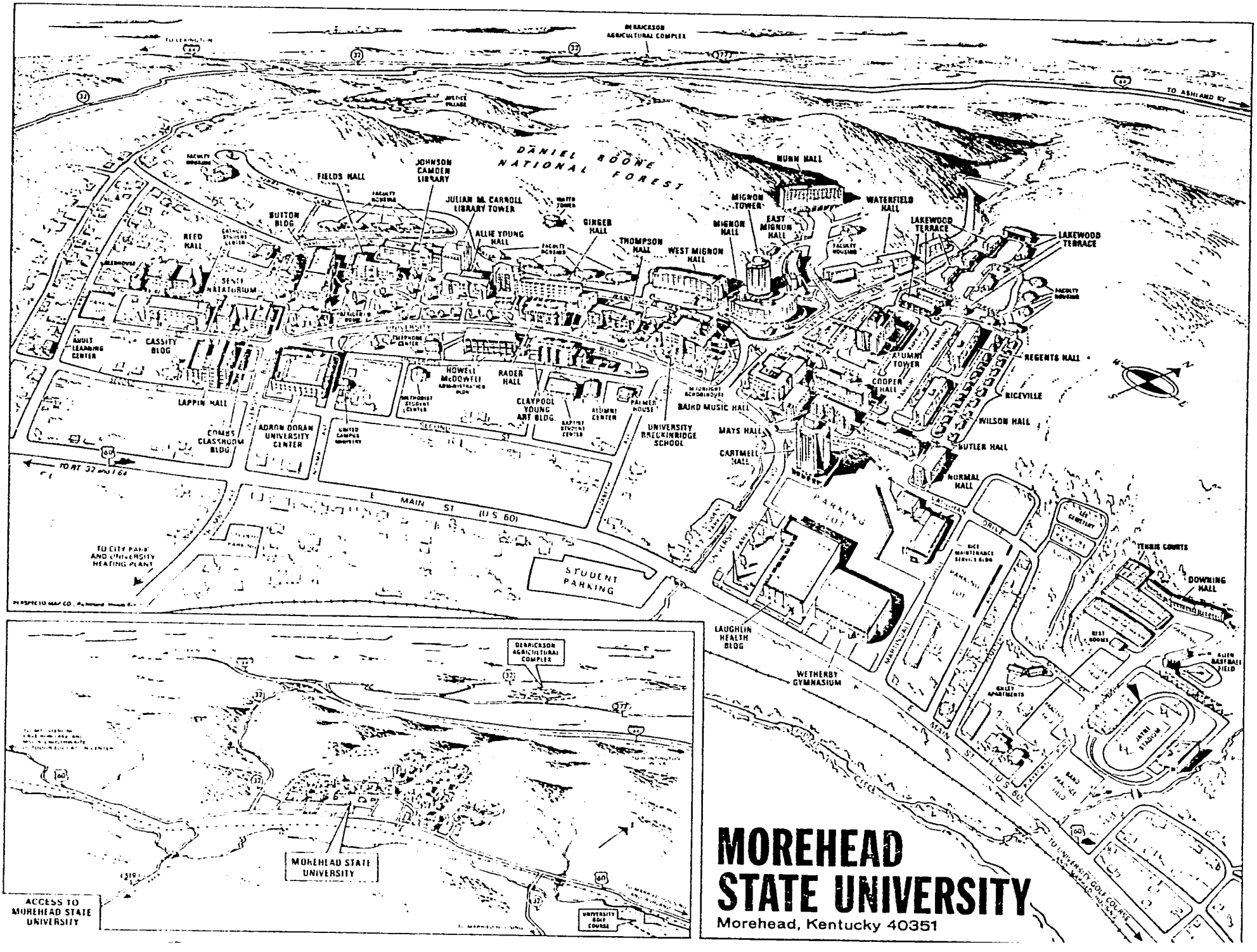
Residential facilities available for participant/trainees will be either on-campus dormitory rooms or near-campus apartment units. The location of the residential facilities will be determined by the time of year the participants are in training at the University. Those trainees placed during the Fall Semester will be accomodated in near-campus apartments (within ten minute walking distance); those in training during the Spring and Summer terms may be accomodated in on-campus dormitory rooms. Both near-campus and on-campus units will meet the privacy and convenience needs outlined at the beginning of this section.

Morehead State University (MSU)

The MSU campus is located approximately 70 miles to the East of Lexington in Morehead, Kentucky. The campus is located in the central part of the city and is within walking distance to the downtown commercial and business section (Figure 3).

The University has modern, fully equipped classroom facilities available to meet the physical training environment requirements of the program. Additionally, modern support equipment, such as computer facilities and audio-visual equipment, are available to the program.

Seven faculty members from the Departments of Business and Economics have bee designated as members of the academic training team (See Report Two, Appendix II). The Dean of the School of Business and Economics is one of the members of the academic training team. Included in the list of academic specialties represented by the team are economic development, agricultural economics, financial management, money and banking, taxing policy


DERRICKSON AGRICULTURAL COMPLEX
TO LEXINGTON
TO ASHLAND KY
DANIEL BOONE NATIONAL FOREST
FACILITY HOUSING
JOHNSON CAMDEN LIBRARY
FIELDS HALL
JULIAN M. CARROLL LIBRARY TOWER
BUTTON BLDG
ALLIE YOUNG HALL
GINGER HALL
THOMPSON HALL
WEST MIGNON HALL
MIGNON HALL
MIGNON TOWER
EAST MIGNON HALL
HUNN HALL
WATERFIELD HALL
LAKEWOOD TERRACE
REED HALL
SENIOR NATATORIUM
GREENHOUSE
ADULT LEARNING CENTER
CASSITY BLDG
TELEPHONE CENTER
HOWELL McDOWELL ADMINISTRATION BLDG
RADER HALL
CLAYPOOL YOUNG ART BLDG.
ALUMNI CENTER
PALMER HOUSE
BAIRD MUSIC HALL
UNIVERSITY BRECKINRIDGE SCHOOL
MAYS HALL
CARTMELL HALL
ALUMNI TOWER
COOPER HALL
REGENTS HALL
RICEVILLE
WILSON HALL
BUTLER HALL
NORMAL HALL
LAPPIN HALL
COMBS CLASSROOM BLDG.
ADRON DORAN UNIVERSITY CENTER
UNITED CAMPUS MINISTRY
METHODIST STUDENT CENTER
BAPTIST STUDENT CENTER
SECOND ST
TO RT 32 AND I 64
E MAIN ST (U S 60)
TO CITY PARK AND UNIVERSITY HEATING PLANT
STUDENT PARKING
PARKING LOT
LAUGHLIN HEALTH BLDG
WETHERBY GYMNASIUM
RICE MAINTENANCE SERVICE BLDG
LEE CEMETERY
TENNIS COURTS
DOWNING HALL
BEST ROOMS
ALLEN BASEBALL FIELD
GILLEY APARTMENTS
JAYNE STADIUM
BAND PRACTICE FIELD
TO UNIVERSITY GOLF COURSE
DERRICKSON AGRICULTURAL COMPLEX
MOREHEAD STATE UNIVERSITY
UNIVERSITY GOLF COURSE
ACCESS TO MOREHEAD STATE UNIVERSITY
MOREHEAD STATE UNIVERSITY
Morehead, Kentucky 40351

and accounting. The academic training team will participate in pre-training orientation sessions designed to provide background information on the social, political, and religious history of the Arab Republic of Egypt. The orientation sessions will be conducted by the Consortium Project Director.

Residential facilities available for participant/trainees will be on-campus dormitory rooms or on-campus married student housing. Both of these facilities provide private sleeping quarters. The married student housing provides full cooking facilities while the dormitory rooms permit limited cooking privileges.

Section II

Training Program

The Bluegrass Area Development District will continue to function as the lead agency of the Consortium. The Project Director will coordinate all field and academic training assignments of the trainees in accordance with the outline presented in Section III.

In addition to the coordination duties, the Project Director will be responsible for the maintenance of the official training records. To provide a permanent training record, the Project Director will maintain the following information on individual participant/trainees:

1. Placement Report which details the academic and field training exposure;
2. faculty and field training supervisor's evaluation of the trainee's performance during the placements;
3. cultural, health, and adjustment problems experienced by the trainee during the placements;
4. the participant/trainee's assessment of the academic and field placements; and
5. final placement summary which will evaluate the trainee's overall performance during the training program.

This record will be useful to ORDEV in evaluating employees under consideration for personnel actions, (e.g., promotion, training, transfer), by providing a source of information on which supervisory personnel can base a decision regarding an individual's ability and training history. The original training record will be forwarded to ORDEV within 30 days after the end of an individual's training exposure with the Consortium.

The Project Director will provide the following monitoring of individual participant trainees:

1. maintain current academic and field training schedules;
2. monitor classwork during the on-campus assignments at a minimum frequency of semi-monthly (See Section III);
3. monitor field training placements on a weekly basis (See Report Three, Section V); and

4. provide to ORDEV a summary report evaluating the performance of the training group as a unit.

Participant Background Data

To tailor the program to the needs of the individual participant/trainee, the Consortium must have certain background and personal data on each trainee. This information will enable the Project Director to determine the most suitable placement during the field training and enable the faculty at the member Universities to determine special needs of the trainees during the academic training. The following minimum information is necessary to make these determinations:

1. Name, place and date of birth.
2. Present residence.
3. Present position in ORDEV with a complete position description and a listing of prior positions held both within ORDEV and with other employers.
4. Post-training assignment (i.e. field or ORDEV Academy).
5. Complete summary of the trainee's educational background including a transcript if one is available.
6. An assessment of the trainee's English proficiency.
7. Family status.
8. Physician's statement of present health.
9. Emergency contact person.
10. List of trainees personal interests and hobbies.
11. Photograph.

(A "Trainee Placement Sheet" form is included as Appendix A.)

In addition to the information above, an individual training authorization notice will be required. This notice should accompany the "Trainee Placement Sheet" and can be in the form of an approval letter.

Training Cycle

The Consortium will use a 12-12-6 (week) training cycle. This cycle will provide maximum flexibility. After the first 12 week period, the Consortium will have the capability of training three groups of participants simultaneously. After the first 12 weeks at Morehead State University (MSU), the participants will continue their academic training at Eastern Kentucky University (EKU) thereby enabling MSU to begin the academic training of another group. When the academic training is complete the participants will begin the six week field training

at the Bluegrass ADD. All participants in the program will follow the following sample schedule:

Time	Action
30 days prior to arrival	Authorization for training and Trainee Participant Sheet sent to Project Director
Arrival	Bluegrass ADD: Three day orientation to the program
12 weeks	Academic training: Morehead State University
12 weeks	Academic training: Eastern Kentucky University
6 weeks	Field Training: Bluegrass ADD

The Bluegrass Consortium can modify the training cycle, with six weeks prior notice from ORDEV, to provide special training sessions.

Section III

Training Schedule

On arriving in Kentucky each trainee group will spend three days of orientation at the Bluegrass ADD offices. This three day period will provide an introduction to the training program. During the orientation sessions the following subjects will be addressed:

1. The design of the training program, its purpose, and an outline of the training schedule to be followed.
2. Introduction of representatives of the area development district and the member universities who will explain, in detail, the role and responsibility of the individual Consortium members.

During the academic training placements, the Project Director will visit the trainee group on a regular schedule (not less than semi-monthly). The purpose of these visits is to:

1. enable the Project Director to be aware of incipient problems;
2. counsel individual members of the trainee group, if necessary;
3. consult with faculty members involved in the program; and
4. gather adjustment and academic progress information of each trainee for placement in the permanent training record.

The schedules listed below will be followed by the Project Director in making training assignments. Detailed information for the academic coursework is contained in Report One (Eastern Kentucky University) and Report Two (Morehead State University). Detailed information for the field training experience is contained in Report Three.

1. <u>MSU coursework program</u> (See captioned pages of Report Two)
   --Applied business skills (pp. 10-14)
   --Local government finance and management (pp. 10-14)

   --Public finance and management (pp. 10-14)

2. <u>EKU coursework program</u> (See captioned pages of Report One)

--Project identification and analysis (pp. 8-16)
--Information systems and data management (pp. 17-21)

--Local citizen participation (pp. 24-33)
--Evaluation and research (pp. 34-41)
--Production and marketing skills (pp. 42-48)

3. BGADD field training (See pp. 30-35 of Report Three)
--Industrial Development programs
--Community Development planning
--Project and feasibility analysis
--Industrial site analysis and selection

--Local government management assistance

--Program/Project monitoring
--Citizen Participation organization
--Public Hearing procedures

NOTE: Those participant trainees designated as trainers at ORDEV Academy will participate in the following course in addition to the job goal classification participation shown above:

"Training Needs, Facilities Assessment, Curricula and Evaluation" (Report One, pp. 5-7)

Section IV

Cross-Cultural Exposure

Exposure to a new or different society without knowledge of its history, government, religious thought and economic system can be a traumatic experience. Total adjustment to the U.S. culture cannot be expected within the seven month period the participant/trainees will be in the United States.

To reduce the potential trauma to the trainees, the Bluegrass Consortium will provide a number of activities designed to provide exposure to a cross-section of American life. The activities include:

1. Interaction with American students during the on-campus placement at Consortium universities;
2. Interaction with students of other nationalities through association with the international student's organizations at Morehead State University, Eastern Kentucky University, and the University of Kentucky (during the field training at the Bluegrass ADD);
3. Attendance at selected sessions of the Central Kentucky Concert and Lecture Series, particularly those sessions dealing with American music, politics, and history;
4. Visits to museums and scenic areas in surrounding areas such as the Kentucky Horse Park (Lexington), Museum of Natural History and Cincinnati Art Museum (Cincinnati, Ohio); tour the Red River Gorge (Stanton, Kentucky);
5. Visits to American and ethnic restaurants including Chinese, Italian, Mexican, and Turkish;
6. Attendance at college and professional sporting events, e.g., American football, basketball, baseball, (professional team - Cincinatti Reds), and university-sponsored track and swimming events; and
7. Tours of Central Kentucky thoroughbred horse farms.

The exposures listed above will provide a broad exposure for the participants during the training program. Some of the events are seasonal in nature and will be available on that basis. Every effort will be made to provide exposure to as many of the events as possible.

major events will be scheduled for weekend attendance to avoid interference with the academic and field training program.

Section V

Program Administration

The Bluegrass Area Development District will serve as the financial coordinator for the ORDEV Training Program. The Area Development District, through arrangements with the universities, will pay all academic fees and charges on behalf of the participant/trainees. It is anticipated that the ORDEV participants' personal expenses such as housing, food, and transportation will be provided directly to them by USAID/ORDEV using the sponsoring agency's rates of per diem and regulations. (The Consortium will provide location assistance for housing and other services.) This centralized receipt and disbursement arrangement will provide a clear accounting of tbe expenditures.

The BGADD Administrative Staff is qualified to administer the financial portion of the program through its experience with other Federal programs. All accounting procedures and record-keeping methods have been approved by the Federal and State agencies who fund the District's programs. Additionally, the operations of the Area Development District are audited on a regular basis by a local CPA firm and the Federal agencies with whom the ADD has funding arrangements.

The Consortium budget is set out below. It consolidates the Consortium member's individual budgets into a single document. The internal budgets of the Consortium members are included as Appendices B (BGADD), C (EKU), and D (MSU).

The budget outlines the estimated cost to provide a complete training program for a group of ten participants. Part I Program Maintenance Cost provides the cost to ORDEV for the availability of the program (e.g. staff and support costs). Part II, Program Operating Cost, outlines the budget for conducting the training. Part III, Total Annual Training Cost, is a combination of Parts I and II that provides an outline of the estimated annual training cost.

Part I

PROGRAM MAINTENANCE COST

Consortium Member/Year	I	II	III	IV	V	Five Year Total
BGADD	15,763	17,339	19,072	20,979	23,076	96,229
EKU	17,628	18,647	19,739	21,212	22,678	99,904
MSU	16,361	17,997	19,796	21,775	23,952	99,881
Five Year Total	49,752	53,983	58,607	63,966	69,706	296,014

Part II

PROGRAM OPERATING COST

Consortium Member/Year	I*	II	III	IV	V	Five Year Total
BGADD	36,914	40,605	44,665	49,131	54,044	225,359
EKU	42,025	44,751	47,920	51,349	54,529	240,574
MSU	29,981	32,979	36,278	39,906	43,897	183,041
Five Year Total	108,920	118,335	128,863	140,386	152,470	648,974

NOTE: Years Two through Five are subject to an annual percentage cost increase as follows:

Blugrass Area Development District	10%
Eastern Kentucky University	7%
Morehead State University	10%

*Year One will be funded through the standard USAID PIO/P process; Years Two through Five will be funded by the host country contracting procedure.

Part III

Total Training Cost*

Consortium Member/Year	I	II	III	IV	V	Five Year Total
BGADD	52,677	57,944	63,737	70,110	77,120	321,588
EKU	59,653	63,398	67,659	72,561	77,207	340,478
MSU	46,342	50,976	56,074	61,681	67,849	282,922
Five Year Total	158,672	172,318	187,470	204,352	222,176	944,988

*Combination of Parts I & II

APPENDIX A

BLUEGRASS CONSORTIUM
TRAINEE PLACEMENT SHEET

PIO/P #

Photograph

NAME:

LAST FIRST MIDDLE

DATE OF BIRTH

☐ MALE
☐ FEMALE

PRESENT ADDRESS

STREET:

CITY:

PLACE OF BIRTH:

PRESENT *ORDEV* POSITION

1a. BRIEF DESCRIPTION OF DUTIES:

POSITION DESCRIPTION ATTACHED ☐ YES ☐ NO

PREVIOUS POSITION *(BEGIN WITH MOST RECENT)*

POSITION	EMPLOYER	BRIEF DESCRIPTION OF DUTIES

POST TRAINING POSITION:

a. *ORDEV* ACADEMY TRAINER ☐

b. ASSIGNMENT TO FIELD ☐

4. ENGLISH LANGUAGE PROFICIENCY

☐ EXCELLENT ☐ FAIR

☐ GOOD ☐ NEEDS FURTHER TRAINING

5. EDUCATION

TRANSCRIPT ATTACHED YES ☐ NO ☐

	SCHOOL	HIGHEST LEVEL ACHIEVED	COURSE OF STUDY
SECONDARY			
COLLEGE			
POST-GRADUATE			
OTHER			

6. PERSONAL

6a. MARITAL STATUS ☐ MARRIED ☐ SINGLE

6b. EMERGENCY CONTACT:

6c. PHYSICIAN'S STATEMENT OF EXAMINATION: DATE _____

REPORT ATTACHED ☐ YES ☐ NO

6d. INTERESTS OR HOBBIES:

FORM COMPLETED BY:

NAME:

TITLE:

TELEPHONE:

DATE:

(FOR CONSORTIUM USE ONLY)

ACADEMIC TRAINING			FIELD TRAINING		
DATE	UNIVERSITY	PROGRAM	DATE	PLACEMENT	PROGRAM

TRAINING COMPLETED _____ (DATE)

SIGNED: _____ PROJECT DIRECTOR

RECORD SENT TO ORDEV _____ (DATE)

DATE: _____

APPENDIX B

Bluegrass Area Development District Budget

Bluegrass Consortium

Bluegrass Area Development District

Field Training Budget

I.	Fixed Maintenance Cost		
	Salaries	$12,000	
	Benefits	2,040	
	Travel	500	
	Supplies	100	
	Indirect Cost	1,123	
	Maintenance Cost Total		$15,763
II.	Program Operating Cost		
	Salaries	$26,000	
	Benefits	4,680	
	Travel*	3,000	
	Supplies	500	
	Indirect Cost	2,734	
	Operating Cost Total (To be provided by PIO/P for Year I)		$36,914
	Total Annual Training Cost (Maintenance + Operating)		$52,677

*Includes lease cost of passenger van for transportation of trainee/participants.

APPENDIX C

Eastern Kentucky University Budget

Bluegrass Consortium

Eastern Kentucky University

Academic Training

I.	Fixed Maintenance Cost	
	Salaries	$11,631
	Benefits	1,861
	Travel	280
	Supplies	2,550
	Indirect Cost	1,307
	Maintenance Cost Total	$17,628
II.	Program Operating Cost	
	Salaries	32,203
	Benefits	5,253
	Travel	677
	Supplies	926
	Indirect Cost	2,966
	Operating Cost Total	42,025
	Total Annual Training Cost (Maintenance + Operating)	$59,653

NOTE: Years Two through Five are subject to an annual percentage cost increase of 7%.

APPENDIX D

Morehead State University Budget

Bluegrass Consortium

Morehead State University

Academic Training

I.	Fixed Maintenance Cost	
	Salaries	$12,290
	Benefits	2,581
	Travel	186
	Supplies	92
	Indirect Cost	1,212
	Maintenance Cost Total	$16,361
II.	Program Operating Cost	
	Salaries	$21,000
	Benefits	4,410
	Travel	600
	Supplies	1,750
	Indirect Cost	2,221
	Operating Cost Total	29,981
	Total Annual Training Cost (Maintenance + Operating)	$46,342

NOTE: Years Two through Five are subject to an annual percentage cost increase of 10%.