



PRACTICAL CONCEPTS INCORPORATED

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SIXTH PROGRESS REPORT

(Period: 1 January - 31 March 1981)

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cc:

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## SIXTH PROGRESS REPORT

### INTRODUCTION

This report covers the period 1 January - 31 March 1981. It contains an evaluation of administrative and technical progress in the Project in relation to the 1981 Annual Plan (also described in this report).

### ADMINISTRATIVE ASPECTS

Lic. Gonzalo Riveros Tejada was named Director of Spatial Planning (previously Regional Planning), on 1 March 1981, the second Project Director in 20 months.

#### Problems:

Problems mentioned in the Fifth Progress Report continue unsolved. In summary, the MPC has not yet appointed the bilingual secretary and administrative assistant which it must provide to the Project beginning 2 August 1981. The Project Jeep in the MPC does not yet have license plates. Some of the Project Jeeps are being used for activities outside the Project. PCI has made a formal protest to the Project Director. Reimbursements to PCI for costs incurred for license plates for Project Jeeps and other services continue unpaid.

The newest problem, which must be resolved urgently, concerns Forward Funding of the Project. This document must be signed by USAID and the MPC as soon as possible, to avoid the possibility that the Project be without financing from the end of May 1981.

### TECHNICAL ASPECTS

#### Achievements

The MPC has instructed the use of the Logical Framework as the method by which all DDC's must present their plans, programs and projects to the MPC. (Instructions from the Subsecretary of Planning of the MPC dated 27 February 1981, and from the Director of Spatial Planning dated 7 April 1981).

Program PL-480 has made the same requirement of the DDC's, that their projects must be evaluated using the Logical Framework, and that PCI advisors must be consulted.

The Subsecretary of Planning has instructed the Planning Offices, including the Spatial Planning, Sectorial and Projects Offices, to use the Logical Frame-

work for their Annual Plans.

The quarterly project evaluation meeting was held in Cochabamba from 9 to 13 February 1981. PCI President, Leon Rosenberg; Vice-Presidents Samuel R. Daines and Larry Posner; and the entire PCI/Bolivia team attended. Concrete results included:

1. 1981 Annual Work Plan
2. Definition of the PCI advisors' role in methodological dissemination (Integral Role)
3. Definition of a new project implementation strategy

#### 1981 ANNUAL WORK PLAN

GOAL: Assist the MPC in achieving national development objectives

PURPOSE: National Regional Planning System strengthened

##### PRODUCTS:

- I. Management Methods Established in the National Regional Planning System
  1. PMS (Sistema de Manejo de Planes, Programas y Proyectos - SMP) introduced in the System (E. García and PCI/Bolivia team).
  2. Proposal for Operative Improvement in CORDECH presented (R. Díez).
  3. Organizational Manual for CORDECH written (R. Díez and PCI/W)
  4. Proposed Operative Improvement in CORDECH implemented (R. Díez and CORDECH)
  5. The department of projects or planning organized by Logical Framework in each DDC (PCI/Bolivia team)
  6. CORDECH Operative Plan written (R. Díez)
  7. Computerization introduced in CORDECH (R. Díez and PCI short-term advisors)
  8. Logical Framework implemented in the Spatial Planning, Projects and Investments, and Public Administration Directions of the MPC (E. García, R. Díez)
  9. CORDECH experiment (Organization and Operative Plan) extended to the entire System (R. Díez and MPC).

II. Analysis and Regional Planning Methods Introduced in the National Regional Planning System

1. Manual on Methodology for Statistical Profiles completed (E. Gómez)
2. Manual on Methodology for Lines of Intervention completed (W. Gómez)
3. Manual on Methodology for Urban Functions in Rural Development (UFRD) completed (H. Evans)
4. Manual on Sectoral Analysis completed (J. Baanante)
5. Manual on Project Analysis completed (M. Burke)
6. Integrated Manual on Methodologies for Analysis and Regional Planning completed (S. Daines, E. Gómez, W. Gómez, H. Evans, J. Baanante, M. Burke)
7. Recommendations to the DDC's regarding application of the Integrated Manual completed (PCI/Bolivia team)
8. Integrated Manual introduced in the System (E. García, PCI/Bolivia team).

III. Training and Capacitation Realized in the National Regional Planning System

1. Seminars on Management Systems done (R. Díez, PCI/Bolivia team)
2. Seminars on Analysis and Regional Planning done (PCI/Bolivia team)
3. UFRD workshops done (H. Evans, PCI/Bolivia team)
4. Personnel trained on the job (PCI/Bolivia team)
5. Other training done (PCI/Bolivia team).

IV. Special Technical Assistance to the DDC's of the Beni and Pando  
CODEBENI (J. Heinzen)

1. Internal management operations systems improved
2. New regional planning methods introduced
3. Personnel trained.

CORDEPANDO (R. Brünn)

1. Significant improvements in the Corporation's administrative systems realized
2. A system for collection and analysis of data functioning
3. Personnel trained.

### METHODOLOGICAL DISSEMINATION (INTEGRAL ROLE)

The second aspect established in the evaluation meeting in Cochabamba is that all PCI advisors, both those involved in methodological experiments and those in Pando and Beni, must be responsible in the Corporations in which they work, for leading in the application of the Logical Framework and the Project Management System (PMS), both for the design and evaluation of plans, programs and projects, as well as for the organization of at least one department (planning or projects) in each Corporation.

### NEW PROJECT IMPLEMENTATION STRATEGY

The introduction of the PMS and Logical Framework in the DDC's has provided the mechanism by which the integrated package of analysis and regional planning methodologies can be applied in the National Regional Planning System.

The experimental cycle in the five Corporations which have provided their resources to test the methodologies terminates with the seminar on Methodologies (29 June - 15 July 1981).

Beginning in August 1981, the Project must begin another phase, putting more emphasis on the dissemination of the methodologies throughout the National Regional Planning System, for which concentrated efforts must be made in institutional implementation aspects with special emphasis on the head of the System, the MPC.

In part, implementation success of the methodologies package within the System will depend on the level of technical acceptance achieved by the seminar in June-July, and the other part will depend on the political decisions that the MPC makes at that time. It is necessary, therefore, that work begin at a level that will insure the package's technical quality, so that the MPC can make a favorable decision comparing the advantages of the PCI package vis a vis other methodologies.

### EVALUATION OF PROJECT PROGRESS

I. Management Methods Established in the National Regional Planning System  
Products 1, 2 and 6 have been completed.

Product 3: Drafts have been completed, and their contents have been discussed in the Corporation. Advisor Diez must travel to PCI/Washington in March-April for assistance in completing the final draft.

Product 4: Approval from the President of the Corporation has finally been secured; but decision-making problems continue in lower hierarchical levels, making implementation of PCI's recommendations difficult. A constant, energetic direction from the MPC for the implementation of the recommendations is necessary. In this sense, a combined action from the Project Director and the Direction of Public Administration of the MPC is necessary.

Product 5: Actions have begun in the DDC/s of Chuquisaca, Beni Pando and Oruro.

Product 7: A study of computation necessities and specifications for acquiring machinery for CORDECH have been presented and approved. Advisor Diez must travel to Washington to finalize details for the purchase of equipment in April 1981.

Product 8: The Direction of Public Administration has been advised regarding its work plan in Logical Framework form. Logical Frameworks for the Offices of Projects and Spatial Planning were completed in the previous quarter.

Product 9: No advance to report.

## II. Analysis and Regional Planning Methods Introduced in the National Regional Planning System

Product 1: Final reports were completed for the Oruro agricultural survey; the survey of artisans, businesses and small industries in Oruro; and the draft of the Statistical Profile for Oruro.

Product 2: Rural surveys on Lines of Intervention potentials and opinion (preference) surveys of campesinos in rural areas were completed. A third survey, on effects of credit, is in process. Computer data processing is in progress.

Product 3: The UFRD team has completed the analysis steps of the Potosi study. This consisted of six steps in spatial analysis, two further steps, involving the elaboration of area strategies, are in progress. Dr. Rondinelli, a PCI advisor, visited the Project 9 - 10 March 1981, indicating that this study has surpassed studies done in the Philippines and Upper Volta, both in depth and quality. Documents produced in the UFRD workshop in March have been delivered to the MPC and USAID.

Product 4: The analysis of situation and functioning of the agricultural sector of the Department of Tarija has been completed. Analysis of restricting factors is in progress. The rainy season has made surveying in chosen areas of O'Connor Province difficult. Therefore, it is expected that there will be a considerable delay in the surveys for the analysis of restricting factors.

Product 5: The field research for a credit (fertilizers) project has been completed, and the data processed. The final report is in preparation. Fifty percent of the field investigation evaluating a potable water project has been completed.

Product 6: The theoretical text by S. Daines is being translated and adapted, introducing examples from the work of PCI/Bolivia advisors (E. Gomez).

Product 7: Nothing to report.

Product 8: Nothing to report.

### III. Training and Capacitation Realized in the National Regional Planning System

#### Product 1:

1. An EMS seminar for the PCI/Bolivia team was done 12 - 15 January, introducing PMS management systems at an advanced level.

2. An EMS seminar for Corporation presidents and managers was done 19 - 23 January in Cochabamba. Presidents and managers of seven of the nine Corporations and three MPC planning advisors attended, a total of 25 participants. The seminar was reported excellent by all participants.

3. A TTM seminar for 35 participants selected by the DDC's from middle levels in planning, projects and administration was done from 26 January - 27 February. The course was also proclaimed excellent, and has had multiplicative effects, which will be noted below.

4. As a result of the PMS course in Cochabamba, internal seminars in the DDC's have been developed by the participants in Cochabamba. At the close of this report, seminars had taken place in CORDEPAZ, CORDECH, CORDECO, CODEBENI and CORDEPO, lasting from 3 to 5 days each. Similar courses were in preparation in CODETAR and CORDEPANDO. It is estimated that a total of 200 technicians have been trained in the DDC's.

Product 2: Preparations are underway for the seminar on Analysis and Regional Planning methodologies, to take place 29 June - 15 July 1981, in La Paz, in the facilities of ISAP, sponsored by the MPC and CORDEPAZ. Toward this end, the Project Director has invited all of the DDC's. This product is logically related with Product 6 in Section II: Analysis and Regional Planning Methods Introduced in the System.

Product 3: The third UFRD workshop took place 16 - 20 March, presenting the results to date of the Potosi studies. Representatives of public entities in Potosi, and PCI advisors from other DDC's (E. Gomez, M. Burke), attended.

Product 4: Three colloquios, of 1 - 2 hour duration, were given in the MPC to the offices of Public Administration, Spatial Planning, Economic Policy, and Projects, explaining project objectives, regional planning and the Logical Framework (E. Garcia, R. Diez).

Advisors R. Diez, H. Evans and E. Gomez visited Tarija on different occasions to support advisor Baanante's work in aspects related to management systems, statistical profiles and urban functions. These activities are part of cross fertilization actions that are important to the implementation of the Project. E. Gomez has done similar work in Chuquisaca.

#### IV. Special Technical Assistance to the DDC's of the Beni and Pando CODEBENI

Product 1: Advisor Heinzen continued advising in the administrative diagnosis of the Corporation, and assisted in determining operational objectives based on this diagnosis.

Product 2: He advised in the preparation of technical questionnaires and the collection of data for the study "Level and Way of Life of Farmers in the San Carlitos Area of Influence".

Product 3: In addition to activities mentioned in Section III (Training), Advisor Heinzen trained personnel to assist in the preparation of the Cafe/Cacao project.

#### CORDEPANDO

Product 1: Advisor Brunn collaborated with the new executives in restructuring the Corporation.

He also advised the public service department on ways to improve its prices, and finally he advised the office of planning on ways to improve their work pro-

gramming.

Product 2: Advisor Brunn formulated a plan to establish a system for data collection and analysis. He collaborated in the collection of data and advised on the format of analysis and tabulation of the data.

Product 3: He prepared materials for the PMS seminar to take place in April for the Corporation staff. He continued on-the-job training advising in the analysis of actual projects. This quarter he collaborated in the elaboration for the PL-480 Program, of Project "Technical Assistance to the Small Farmer."

#### WORK PLAN FOR THE QUARTER APRIL - JUNE 1981

##### I. Management Methods Established in the National Regional Planning System

Product 8: Assistance in implementing their Logical Frameworks will continue to the Offices of Spatial Planning, Projects and Public Administration (E. Garcia).

Product 5: This product will continue in all DDC's. Actions for this product in the DDC's in Tarija and Potosi will begin (PCI/Bolivia team).

Product 4: Advisor Diez will continue actions with the authorities and technicians of CORDECH to implement PCI recommendations. Stronger actions by the MPC and USAID to support the suggested changes are expected.

Product 3: The Manual for Organization of CORDECH will be completed approximately 15 May 1981 (R. Diez).

Product 9: No programmed activities.

##### II. Analysis and Regional Planning Methods Introduced in the National Regional Planning System

Product 1: The Manual on Methodology for Statistical Profiles will be completed approximately 15 May 1981 (E. Gomez).

Product 2: The Credit survey will be completed, and also the Manual on Methodology for Lines of Intervention will be completed approximately 15 May 1981 (W. Gomez).

Product 3: Preparation of packages of projects will continue for sub-regions of the department. Drafts of the reports already completed will be revised for presentation in the seminar on Analysis and Regional Planning Methods. Finally, the survey of urban centers and the accessibility model will be computeri-

and (H. Evans).

Product 4: The analysis of restrictions will be completed, despite difficulties of the weather, the survey should be completed by 15 May 1981. Therefore, Evaluation and analysis will have to be completed by the National Technical Analysis will be written in June (H. Evans).

Product 5: All field experiments and the Manual on Technical Analysis will be completed approximately 15 May 1981 (H. Burke).

Product 6: Products 1 - 5 (Manuals) will be integrated into one final manual on Analysis and Regional Planning Methodologies. This work will be done in Utah under the direction of S. Galvez, approximately 28 May - 8 June. From 9 - 15 June, the MPC will have the opportunity to review the "Manual" (S. Galvez, E. Gomez, W. Gomez, H. Evans, J. Escamote, H. Burke).

Products 7 and 8: No activities are programmed this quarter.

### III. Training and Capabilities Realized in the National Regional Planning Project

Product 1: Internal training on the PDS within the Corporations will be done (PDI/Solivia Plan). The Chief of Party will travel to Santa Cruz to explain the Project and the Plans of the PDS. Cooperation between the Corporations to incorporate CORDECORUZ into the activities on the PDS and other Project activities will be done.

Product 2: In immediate response to the request for a manual on Regional Planning Methods introduced by the Director General of the PDI, a training workshop on "Analysis and Regional Planning Methods" is planned for 15 July 1981, in ICAAP in La Paz. The three DDC's and the DDC will participate.

The training workshop will coincide with the training in Product 3 above, introducing for the first time the DDC methodology and other Project methodologies (H. Evans).

Product 4: Training in projects, by advisors from the PDI, will continue in their respective DDC's.

Product 5: No other special activities are programmed for this quarter.

IV. Special Technical Assistance to the DDC's of the Beni and Pando

CODEBENI

Product 1: Advisor Heinzen will work with his new counterpart on objective trees and they will produce Logical Frameworks for each department of the DDC.

Product 2: The study of the area of influence of the San Carlitos project will be finished; and training of technicians in the use of computation for the processing of data for another study that is on-going in the DDC, regarding the level of life in the area of influence of San Borja will be done (J. Heinzen).

Product 3: Activities for this product are mentioned in Product 4 of Section III: Training and Capacitation Realized in the National Regional Planning System.

CORDEPANDO

Product 1: Assistance in the reorganization of the Corporation will continue; especially assistance in the definition of hierarchical relations within the management personnel and internal flow of information and orientation in each office (R. Brunn).

Product 2: Data analysis will be completed and presented to technical authorities (R. Brunn).

Product 3: Activities for this product are mentioned in Product 4 of Section III: Training and Capacitation Realized in the National Regional Planning System.

ADDITIONAL COMMENTS

As was indicated in the Fifth Progress Report, given increasing demands from the MPC to extend the PMS management system to the entire MPC and the Economic Sector of the National Regional Planning System, PCI signed a new contract with the MPC 21 March 1981.

Unfortunately, PCI had to suspend this new project 21 March 1981, since the MPC could not effect its first contractual payment.

Under the new project a PMS seminar was given for the MPC and the Ministries of Finance, Industry, Agriculture, Mining and Energy. The training activities of the new project helped effectively to disseminate the management methods of the AID 511-0471 Project. It also laid the groundwork for implementing uniformity of method in the presentation of plans and projects in the National Regional Planning

System, a fact that if continued, would have considerably benefitted the decision-making process for approval of regional development programs.

It is deplorable that this new project could not continue, due, according to MPC authorities, to budget problems within the government.