

MID-TERM EVALUATION
UWI MANAGEMENT
EDUCATION PROJECT
(532-0129)

Implemented by:
THE UNIVERSITY OF THE WEST INDIES
with the assistance of
PENNSYLVANIA STATE UNIVERSITY

Evaluated by:
Robert Girling
Melanie Sanders
THE PRAGMA CORPORATION

Evaluated for:
UNITED STATES AGENCY
FOR INTERNATIONAL DEVELOPMENT
Kingston, Jamaica
October 5, 1989



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BASIC PROJECT IDENTIFICATION DATA

1. Country: Jamaica
2. Project Title: UWI Management Education Project
3. Project Number: 532-0129
4. Project Dates:
 - a. Project Agreement: 9/11/87
 - b. Final Obligation Date: FY90
 - c. PACD: 9/30/90
5. Project Funding:
 - a. AID Bilateral Funding: US\$2,450,000.00
 - b. Other Major Donors: -0-
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Total	US\$3,270,000.00
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6. Mode of Implementation: Bilateral agreement with the University of the West Indies; host country contract between UWI and Pennsylvania State University
7. Project Designers: UWI, USAID, and Penn State University
8. Responsible Mission Officers:
 - a. Mission Director: William R. Joslin
 - b. Project Officers: Nola Mignott, William Charleson
9. Previous Evaluations: None

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EXECUTIVE SUMMARY

In June 1989, USAID/Jamaica contracted The Pragma Corporation, a Washington, DC-based consulting firm, to conduct a midterm evaluation of the University of the West Indies Management Education Project (Contract No. 532-0129-0-00-9137-00).

PROJECT PURPOSE. The project is designed to increase the number and quality of skilled mid- and upper-level managers in Jamaica. USAID has chosen to do this through providing a grant to UWI for assistance to the Department of Management Studies at UWI's Mona Campus. The purpose of the project is to strengthen the University's management education and training capability. To achieve this purpose, Phase I (1987-90) is focusing on three major areas: staff development, program development, and the introduction of new organizational structures.

PURPOSE OF THE EVALUATION. The purpose of this first external, interim evaluation is to help USAID and UWI improve and focus project activities during the remainder of Phase I and to provide the basis for outlining the parameters of Phase II. A 2-member team approached this task by reviewing project documentation and conducting a series of open-ended interviews with key informants from USAID, UWI, the business community, and public sector individuals.

MAJOR FINDINGS AND CONCLUSIONS. The project is generally on target and proceeding apace. Inputs have been provided as planned, with a few minor exceptions. Outputs in the first part of Phase I have focused on training staff, developing the Executive MBA, delivering Executive Management Development seminars, constructing a new building, and procuring computer equipment. The project is lagging in several areas of staff development, research, program development (particularly the BSc), the Institute of Business, and procurement of library materials. Major findings and conclusions by category are:

Validity of Assumptions. Goal, output, and input level assumptions remain valid. On the output level, however, there are problems in terms of staff advancements to lecturer (for new staff) and to senior lecturer level (for existing staff). Greater emphasis on research could correct both.

Staff Development. By the end of Phase I, nine new staff will have received MSc degrees from PSU. To date, two existing staff members have gone to PSU for short-term training and eight for consultations. Staff development is on target in quantitative terms and the project must now focus on assimilating new staff.

Program Development. The project has made remarkable

progress in development of the Executive MBA which is scheduled to begin July 31, 1989. Work has begun on the upgrading of the BSc, Certificate, and Diploma programs but progress has been slow. Six cases have been developed but little progress has been made in the area of research projects and the internship program. The remainder of Phase I must focus on implementing the EMBA and initiating action in the other programs, especially the BSc.

Institute of Business. IOB has been approved and fully accepted by the University administration, the Faculty of Social Sciences, and the Department of Management Studies. The Board of Directors held the inaugural meeting on January 20, 1989. IOB must immediately concern itself with research, consultancies, and internships. With the hiring of a director many of the responsibilities of the project will be conducted as IOB activities, e.g., EMDP seminars, research, and the EMBA.

Construction, Computers and Library. Construction is complete and the building is entirely operational. Computer procurement is 70 percent complete and staff and students have begun using it. The library list is complete, but no materials have yet been purchased. The materials will be bought when USAID obligates FY89 funds. Our main concern is that these procurements be fully and effectively utilized.

Contractor Performance. Penn State has performed well in providing liaison between UWI and PSU for staff training, developing cases, developing the EMBA, and assisting with the EMDP seminars. They have not yet met their contractual obligations with regard to the BSc program, introducing instructional aids, teaching BSc and EMBA courses, and establishing a library data base. They must quicken their pace if they are to satisfactorily meet their obligations by September 1990 (PACD).

University Support. Support among UWI administration, within the Department of Management Studies, and among the Faculty of Social Sciences varies. Support is generally positive, but a sense of alienation from the project still exists among some staff members. Committing them to the project is essential if IOB and other project activities are to be achieved and if the project will accomplish its institution-building intent.

Interaction with the Business Community. The project has reached out to the private sector since inception. The dialogue is frequent and meaningful. Committees with representatives from the business community and individual businesspeople continue to offer guidance and support for the EMBA and EMDP. The project is well regarded in the community, and firms have demonstrated willingness to contribute human and financial resources to project activities. There is reason to believe this support will continue as long as DOMS services the needs of the business community and

project activities. There is reason to believe this support will continue as long as DOMS services the needs of the business community and becomes more practical in its orientation.

Interface with Management Training Institutions. In May 1988 the project hosted a meeting with representatives from nine training institutions to initiate a Needs Assessment Exercise. They were briefed on the project as well as UWI's accreditation procedures. UWI's accreditations were sent to all institutions subsequent to the meeting. These institutions also participated in two seminars sponsored by the project and conducted by PSU faculty. These were in the areas of institutional research and executive education. One person from JIM also attended a case writing workshop.

Regionalism. The regional nature of UWI, insofar as it affects the USAID/Jamaica project, has been considered throughout the project. Consideration of regionalism was evidenced in such things as the approval process for the EMBA and IOB, as all campuses must sanction such actions.

MAJOR RECOMMENDATIONS FOR PHASE I

Staff Development. (1) DOMS should explore options for addressing the compensation issue, as it continues to plague the Department and impede staff development activities. (2) The project should develop a strategy for assimilating new staff and then follow-through. (3) Continue to recruit resource people from the business community, the Fulbright Scholar program, and other UWI departments and campuses to teach in the EMBA program.

Program Development. (1) Increase available spaces for the next class of EMBA. (2) Continue efforts to better prepare visiting lecturers in EMBA and EMDP for Caribbean context and monitor to ensure relevancy. (3) Gradually move the EMBA, EMDP, and CFM journal toward staffing and financial self-sufficiency. (4) Promote wider distribution of case studies and monitor to ensure utilization in BSc and EMBA. (5) Develop an internship program for BSc students.

Institute of Business. (1) Advertise for the position of Director. (2) Establish a committee of FSS staff to develop options for attracting staff to participate in research and consultancies through IOB.

Construction, Computers, Library. (1) Train staff and students in computer software and hardware. (2) Designate a staff member and several student assistants to serve as resource people for the computer lab. (3) Make library available to the business community.

Contractor. (1) Clarify roles and expectations with new resident advisor. (2) Monitor performance closely to ensure that there is significant improved performance by January 1990 in areas for which achievement of contractor's obligation is currently lagging. (3) If PSU has not improved performance by December 1989, consider opening contract up for bid for Phase II, assuming there is a second phase.

University Support. (1) Assign resident advisor to teach at least one BSc or MSc course or EMBA module per term. (2) Encourage and fund joint research projects between DOMS and other FSS staff. (3) Combine the staff of Public Administration with DOMS.

Interaction with Business Community. Publish a quarterly newsletter to provide private sector with new information and progress on the project, as a means of maintaining their interest and support.

Interface with Management Training Institutions. (1) Conduct follow-up meetings to clarify accreditation procedures with IMP, JIM, and ASC. (2) Hold more meetings with IMP, JIM, the Administrative Staff College, and other institutions providing management training.

ACRONYMS

ACCA	Association of Certified and Chartered Accountants
AID	Agency for International Development
ASC	Administrative Staff College
BSc	Bachelor of Science
CARICAD	Caribbean Center for Administration and Development
CAST	College of Arts, Sciences and Technology
CFM	Caribbean Finance and Management
DOMS	Department of Management Studies, UWI
EMBA	Executive Masters of Business Administration
EMDP	Executive Management Development Program
HRD	Human Resources Development
IOB	Institute of Business
IMP	Institute of Management and Production
JEA	Jamaica Exporters' Association
JIM	Jamaica Institute of Management
MSc	Master of Science
MIS	Management Information System
OECS	Organization of Eastern Caribbean States
PhD	Doctor of Philosophy
PSOJ	Private Sector Organization of Jamaica
PSU/CBA	Pennsylvania State University, College of Business Administration
UAC	University Academic Committee
USAID	United States Agency for International Development
USIS	United States Information Service
UWI	University of the West Indies

I. INTRODUCTION

USAID/Jamaica conducted several studies from 1981-86 which concluded that there is a shortage of skilled managerial manpower and consequently, ineffective performance at the mid to upper levels of both private and public sector institutions. This lack of adequately trained managers has been identified as a constraint to private sector initiatives that try to sustain the growth of the Jamaican economy. This constraint is viewed as pervasive in both private and public organizations where modern, professional, technical and managerial skills are conspicuously lacking. This project was, thus, developed to help the University of the West Indies play a more active role in meeting the aforementioned shortage.

A. BACKGROUND OF THE PROJECT

1. GOAL AND PURPOSE OF THE PROJECT

The goal of the project is to overcome the shortage of trained managers at the middle and upper management levels of both public and private sector business institutions in Jamaica.

The overall purpose of the project is to assist in the development and strengthening of the management education and training capability of UWI's Department of Management Studies.

2. PROJECT DESCRIPTION

The project was designed by UWI under a collaborative assistance mode with Pennsylvania State University's College of Business Administration and USAID/Jamaica. The long-term nature of this institutional development undertaking envisions an effort spread over a ten-year period, to be implemented in three phases. Phase I commenced in September 1987 and ends in September 1990.

The Phase I consists of three components: staff development, program development and introduction of new organizational structures. Staff development entails upgrading the capabilities of DOMS staff to deliver management education programs which address the needs of the Jamaican business community. Program development efforts include the establishment of new and improved courses at the BSc level, the introduction of a new Executive MBA program and a new Executive Management Development Program. The third component, which will introduce new organizational structures, includes new physical facilities and units in the DOMS, and the establishment of an Institute of Business.

3. INPUTS AND OUTPUTS

Technical Assistance is being provided by the faculty of Pennsylvania State University/College of Business Administration. Assistance from PSU focuses on development of staff, the BSc, EMBA and Executive Management Development Program; research; library and information resources; and computer facilities for DOMS. To accomplish this, a PSU/CBA resident advisor is assigned to UWI. Other PSU/CBA faculty members also go on short periodic visits to UWI, while others assist the DOMS staff during their consultations, training and observations at PSU/CBA.

Training is offered for existing and new DOMS staff members. Courses include four-week Executive Development Programs, the MSc in management, and semester courses in business management and research.

The following commodities have been or will be provided or purchased for the project:

- a. 28 micro-computers, 5 personal computers, related peripherals, software packages and furniture for installing and utilizing them for teaching research and administrative activities in the DOMS;
- b. 3 vehicles for use in the project;
- c. library and information resources, such as textbooks, journals, periodicals, audio-visual aids and teaching materials (e.g. overhead projectors, transparencies, videotapes and films); and
- d. furniture and fittings for additional classroom and office space provided for the DOMS.

UWI support services facilities will be provided for the duration of the project through Planning and Central Administration support and include office and classroom space, equipment, furniture and utilities for project administration and the implementation of project activities.

The major planned outputs of Phase I are:

Staff development which includes (a) upgrading the teaching and research skills of ten existing DOMS staff to teach BSc courses, selected modules of the EMBA program, and seminars in the EMDP series offered by UWI; and (b) having nine new DOMS staff members complete the MSc in Management, thus providing them with the prerequisite background to teach course offerings in DOMS' BSc program.

Program development planned outputs are (a) restructuring and updating fifteen existing courses within the BSc program and instituting eleven new courses; (b) establishing a new Executive MBA program consisting of fifteen instructional modules; and (c) conducting an Executive Management Development Program series for executives and senior managers from the business sector.

Planned outputs for research and development are (a) developing four cases relevant to the Jamaican business environment for use in teaching BSc and EMBA courses; and (b) conducting six research projects for solving specific selected problems of the business sector and generating information for development of case studies and instructional materials.

Computer facilities have been installed in two classrooms and one office in the DOMS consisting of computer hardware, related peripherals and software for use in teaching, research and administration.

The library will be updated with textbooks, journals and periodicals in business management and related fields, which will provide increased access to reading and reference materials for students in the DOMS. Other resources, like audio-visual materials and equipment, will be made available for teaching courses in DOMS.

An Institute of Business has been established as one of the organizational structures to be governed by a special Board of Directors. DOMS will conduct the EMBA, the EMDP and its research program activities through the Institute.

DOMS will institute closer collaboration with the business sector. Additionally, DOMS will maintain closer collaboration with other major institutions providing management training, such as IMP and JIM. Outputs in this area will be the result of an assessment and validation of the needs of these institutions and how these can be accommodated within the scope of the project. Some examples of the types of outputs foreseen include (a) accreditation by UWI of courses offered by other management training institutions; (b) development by UWI of case studies in collaboration with other training institutions; and (c) training of part-time lecturers from other management training institutions under the staff development program of the project.

B. PURPOSE OF THE EVALUATION

The purpose of this first external, interim evaluation was to help USAID/Jamaica and UWI improve and focus project activities during the remainder of Phase I and to provide the basis for outlining the parameters of Phase II.

Very specifically, this evaluation was conducted to ascertain:

- (1) the extent to which the project's planned inputs and outputs have been achieved and the extent to which they are contributing to the timely attainment of the project's purpose;
- (2) the extent to which the project's assumptions continue to be valid;
- (3) the extent to which Pennsylvania State University is meeting its contractual obligations to UWI in a timely and substantive manner;
- (4) the extent to which project activities are attracting support from faculty in other parts of the UWI (i.e. from staff not directly involved in the DOMC program);
- (5) the extent to which individuals from the Jamaican business community are involved in DOMS activities;
- (6) the extent to which the DOMS program is interfacing with institutions in Jamaica which are providing management training (e.g., JIM and IMP); and
- (7) the extent to which the development of the DOMS program takes into account the regional nature of the UWI.

See Annex A for further details on the scope of work.

C. TEAM COMPOSITION AND METHODOLOGY

The evaluation was undertaken with active participation of individuals from the project staff, DOMS, UWI administration, and the Jamaican business community. The UWI project manager, Neville Ying, was key in arranging interviews and providing project documentation. He also accompanied Pragma on interviews with UWI administration and with the business community. DOMS staff, UWI administration, and representatives from the private sector provided insights and recommendations that were incorporated into the report.

Melanie Sanders and Robert Girling--Pragma's evaluation team--were responsible for gathering data and producing the draft report. UWI and USAID provided oral responses to the first draft and provided written comments on the second draft.

Pragma's team began by reviewing project documentation and designing evaluation tools. The main instrument used was the oral interview (see Annex H). The open-ended interviews were conducted with key informants from USAID, UWI, the business community and the public sector. (See Annex F for a list of individuals interviewed.)

II. FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

A. PROJECT INPUTS AND OUTPUTS

The project is generally on target and proceeding apace. Inputs from USAID, the University, and business community have been provided as planned, with a few exceptions. Outputs in the first half of Phase I have focused on training staff, developing the Executive MBA, delivering Executive Management Development Program seminars, constructing a new building on campus, and procuring computer equipment. The project is lagging in several areas of staff development, program development, research, the Institute of Business, and library materials. Table 1 shows the status of major project outputs.

The progress is impressive given the sluggish start-up and delays caused by Hurricane Gilbert in September 1988 and the General Election in February 1989. Both shifted the attention of faculty members and caused project meetings and activities to be postponed. Other factors that have slowed progress are the current discussions about the future direction for management education and the planned introduction of the semester system University-wide in 1990.

TABLE 1
Status of Major Quantifiable Outputs

	Projected LOPS	Actual to date	%Completed to date
1. Staff Development			
New Staff	9	6	67%
Existing Staff	10	3	33%
2. Program Development			
BSc New Courses	11	0	0%
BSc Upgraded Courses	15	4	27%
EMBA New Modules	15	15	100%
EMDP Seminars	6	2	33%
3. Research Program			
New Cases	6	6	100%
Research Projects	6	0	0%
4. Computer Facilities			
PCs	28	20	71%
5. Library			0%
6. Construction			100%

It is somewhat premature to evaluate every output in terms of quality or quantity. For example, since the Institute of Business has not yet hired a director and has had only one Board meeting, there is little to evaluate. In cases like this, we merely offer recommendations based on anticipated problems and general concerns rather than on empiricism.

In addition to the specified project activities there were several ancillary benefits which have come about as a result of the project. First, through its emphasis on staff development for the new recruits, the project caused the University to examine more carefully its general policies in the areas of staff development and promotion. Informal procedures and unwritten policies became articulated in the course of considering how the new staff members would be evaluated. Second, the project has resulted in a closer examination of the general directions of management education at the three campuses. A meeting which was held in Cave Hill in March 1989 examined the future of management education and attempted to chart some directions with regard to impending semesterization.

Another spin-off was the refining of University procedures. For example, forms were developed for submission of research proposals and procedures clarified for award of University funds. Procedures for accreditation of work outside the University were written down. A new journal, Caribbean Management and Finance, which is now in its fourth volume, was added to provide a vehicle for the publication of University research in management. The journal is published by DOMS in conjunction with the project and the Administrative Staff College. While these activities were not specifically included in the Project Paper, they have benefited not only the project and DOMS, but also the entire university system.

1. STAFF DEVELOPMENT

Development of Existing Staff. Two full-time staff from DOMS have attended short-term training courses and eight have gone to PSU for consultations with PSU faculty. Table 2 shows the short-term staff development efforts for existing staff.

In addition to training held at PSU, faculty development seminars have been held on development of case studies, research, executive development seminars, accounting, curriculum development, and development planning. These workshops have been conducted on-campus by PSU and attended by full-time DOMS staff.

TABLE 2
Status of Training for Existing Staff

<u>Name</u>	<u>Date</u>	<u>Activity</u>
Dr. K. Worrell	Jul 87	Executive Management -Exec Mngt Course
Dr. K. Small	Sep 87	Operations Management -consultation visits
Prof. R. Williams	Sep 87	Accounting, Finance -consultation visits
Dr. K.D. Edwards	Sep 87	Using Computers in Teaching -consultation visits
Mr. L. Lindo	Sep 87	Project Management -consultation visits
Mr. E. Gibson	Aug 88	Exec Mngt Programs
Mr. D. Ramjeesingh	Sep 88	-observation/consult
Mr. F. Felix (P.T.)		Production Mngt Seminar -participation
Mr. U. Salmon	Sep 88	Managerial Accounting Methods of Training -consultation visits
Mr. H. Hardy-Henry	Dec 88	Accounting Trends -consultation visits
Mr. M. Williams	Feb 89	Library, Actng, PhD -consultation visits

There is still a dearth of professors with doctoral degrees. Of the 16 full-time staff members, 3 have a PhD. Faculty who hold a MSc or MBA are certainly qualified with regard to practical knowledge, but are unlikely to have the breadth of knowledge and experience in the use and application of research methods. Although it was not the intent of Phase I to address this problem, it is imperative to ensure that some of the faculty receive PhD training since a major aspect of the project focuses on the development of research skills.

Recommendation: If there is a Phase II, it should include opportunities for selected faculty members to go the United States to complete PhD training.

The issue of compensation was identified in the design of the project as a critical constraint to recruitment and retention of staff. (Basic faculty salaries range from US\$6,200 to 17,400, and salary packages--which include housing and travel benefits--range from US\$10,300 to 27,900.) We found that inadequate compensation also thwarts efforts to train existing staff. Some faculty members

engage in teaching and consultancies outside the University to top off their salaries. For most of these individuals, there is little incentive to spend time in training.

Recommendation: With guidance from PSU--and through IOB-- explore strategies for addressing the compensation issue. One option is to solicit financial support from the business community to top off salaries or endow chairs. This would not only address the issue of training, but recruitment, retention, and research. Another option is to promote contracted research and consulting. (Members of the business community suggested that faculty should be able to earn an additional US\$20,000 to 40,000 per year in consulting.) A third option is to provide for joint appointments.

Training Program for New Staff. Three individuals have received MS degrees from Penn State and have returned to UWI to take posts as Assistant Lecturers and were assigned duties for lectures, tutorials, and research. Three more are expected to return by September 1989. In August, three people will depart for Penn State to begin their masters programs. When the final group of three returns, nine new staff will have received MS degrees from Penn State and taken positions in DOMS, which will meet the original target of nine.

TABLE 3
Status of New Staff Training

<u>Name</u>	<u>Concentration</u>	<u>Status</u>
Ms. Rosemarie Clarke	Accounting	Assistant Lecturer
Mr. Micnael Haughton	Mngt. Science	" "
Mr. Audley Harris	MIS	" "
Mr. Devon Johnson	Marketing	Return 9/89
Ms. Ann Crick	HRD	" "
Ms. Dahlia Robinson	Finance	" "
Ms. Sharon Celestine	HRD	" "
Ms. Karen Jones	MIS/Marketing	" "
Ms. Pauline Chin	MIS/Prod. Mngt.	" "

Table 3 shows the names and areas of concentration for the new staff. DOMS faculty members re-evaluated the staffing needs of the Department (the needs have changed since the Project

Paper was written) and then selected individuals for training. A heavy emphasis has been put on MIS, partly in response to the recent death of a senior faculty member who taught MIS courses. There are still significant gaps in DOMS staffing, i.e., industrial relations, production operations management, business ethics, international business, and human resources development.

Recommendation: DOMS should continually evaluate the gaps between faculty expertise and curriculum deficiencies. A concerted effort should be put into recruiting appropriate people--junior or senior staff--to fill the curricular gaps.

Concern was expressed that several of those who have returned from training at Penn State do not feel prepared to take on full teaching responsibilities on return from PSU. By the end of Phase I, DOMS will have nine new junior faculty members, making the Department bottom heavy. This means that senior staff will continue to have weighty teaching responsibilities for a few more years.

With regard to teaching loads, DOMS has had the highest in UWI and is substantially higher than any other department--with the exception of economics and government. For 1988/89, the student/staff ratio of DOMS was 47.4, while economics was 35.1, and government 32.9 compared with education at 17.6, english at 13.6, and law at 8.4. Class sizes are exceptionally large; of 15 courses offered by DOMS in 1988/89, only three had less than 100 students, while 6 had over 200 students. This means that the average DOMS faculty marks anywhere from 200 to 600 exams.

Recommendation: For the remainder of Phase I, the project staff, resident advisor, and DOMS should work together to develop a strategy for fully and effectively assimilating the new staff in the Department. Special attention should be given to developing their teaching skills, and capacity and motivation for research.

Visiting Faculty Appointments. The purpose of this component was for PSU faculty to aide in staff and program development. To date, eight professors from PSU have visited the Mona campus. They have consulted with counterpart staff, conducted staff development workshops, written position papers, and given lectures.

Efforts outside the project have been made to attract visiting faculty. For example, a Fulbright Scholar will serve as a visiting lecturer for the 1989/90 academic year. This effort is being coordinated through the USIS. Additionally, according to a recent publication of the Jamaica Exporters' Association, the JEA--in collaboration with UWI--has organized and implemented visiting lecturers and factory visits. Individuals with expertise and experience in export and marketing have been asked to conduct

lectures at DOMS, while firms have been approached to accommodate detailed factory tours for management students. The Harvard Business School Alumni club has offered to arrange for and fund visiting professors from the Harvard Business School.

Recommendation: Make more systematic use of Fulbright Scholars, Harvard Business School Alumni, and local resources.

Part-time Staff. Since a considerable portion of the Management Studies program is taught by part-time staff, the designers of this project recommended giving greater recognition to this group. Nothing has yet been done in this regard.

Recommendation: The Project Manager should add this topic to the agenda of a future committee meeting agenda. If still viewed as appropriate, the qualifications and teaching performance of all individuals who are now teaching on a part-time basis in the Department should be examined. Upon review, all qualified staff should be accorded more attractive titles such as Associate Lecturer or Adjunct Lecturer. The appointments should be reported to the press and the changes should be reflected in all UWI literature (i.e., catalogues and brochures).

One part-time staff member has been sent to Penn State for training and one was sponsored for an overseas accounting conference. The project plans to send another person in Phase I.

Executives in Residence. The purpose of this activity was to link the business community with the University. No Executives in Residences have yet been appointed to DOMS.

Our interviews with the business community strongly suggest that it is unrealistic to expect firms to release busy executives full time for a term or year. We did learn, however, that there is significant willingness to contribute staff time, but in more defined and limited ways.

The project team anticipated this difficulty and has developed an approach that has already gained support. They recently hosted a well-attended luncheon for executives that served as an update on the project and an opportunity to strengthen their commitment to it. Additionally, the executives were asked to complete a questionnaire indicating their qualifications and the role they were willing to play with particular modules of the Executive MBA (i.e., presenter, guest lecturer, reviewer/evaluator, discussant, and module validation). The responses to the questionnaire indicate a serious desire to contribute to the project. Our findings confirm this and we conclude that this approach will allow the project to realize the

same goal through a more practical means.

Recommendation: The project staff should host other luncheons of this nature to recruit resource persons for the EMBA. They should also use this approach to enlist support for research activities, internships, and participation in the BSc and Executive Management Development Programs. The importance of follow-up cannot be overemphasized. At a minimum, a letter should immediately be sent to the respondents expressing appreciation and indicating next steps. They should periodically be informed of the progress of the project to maintain their interest and commitment to it. A newsletter or letter are recommended for achieving this.

Recommendation: The project staff should make contact with Alcan regarding the post they were previously willing to fill for the Executive in Residence. They should also canvass the business community occasionally for other firms willing to provide an Executive in Residence.

2. PROGRAM DEVELOPMENT

BSc Program. Project implementation has not given this the priority attention that the Project Paper suggested it should. The Faculty has undertaken a more broadly-based discussion on the overall development of management studies including transforming the first year from a uniform Faculty of Social Sciences program to an Introduction to Business program. Additionally, the second and third years would offer options equivalent to a major in marketing, finance, or human resources development, for example. The outcome of these discussions will have a major impact on any changes that are made in the BSc curriculum.

Discussions have also focused on the change to a semester system. Any changes made in the BSc would have had to have been reconsidered upon approval of the semester system, so perhaps it is fortuitous that not much has been done on this.

Our interviews with the business community did not demonstrate a strong need to make major changes in the BSc, a finding which differs from Marshall Hall's earlier study. The attitudes of respondents were generally favorable toward BSc-Management students. But since the reactions varied--although not radically--we do not guarantee that our findings are representative. One confirmation of this, however, is the constant and strong demand in the private sector for BSc-Management students, which continues to be greater than for graduates from any other UWI department. The BSc graduates are reported to be well-prepared and able to perform adequately in a variety of tasks.

The limited attention given to the BSc program has been directed toward accounting courses. These courses are currently being reviewed and developed in collaboration with the Institute of Chartered Accountants for Jamaica and the Caribbean Region. They are also considering the possibility of localizing ACCA examinations. Attention has also been given to courses in marketing, money and banking, business law, computer science, the Caribbean environment, and introduction to business. Consideration has been given to including courses on business and government; international business; communication skills; business ethics; and integrating people with modern technology.

Recommendation: The workshop for review of the BSc program--which was previously scheduled for November 1988-- should be held by November 1989.

Executive MBA Program. The EMBA has been approved and fully designed. The program will begin July 31, 1989 with about 30 students. Interest in the program was strong, with 222 applicants. A clear majority of the accepted students are being completely sponsored by their firms, indicating support from the business community. It appears that this heavy demand will continue.

Recommendation: Consider making more spaces available for the second class, given the demand for the program. Filling the class to capacity will not only better meet the demand, but will make the program more cost effective.

Recommendation: Maintain the EMBA as a part-time program to allow participation of currently employed professionals. This will help prevent flooding the market with unemployed or underemployed MBA graduates.

The program will be staffed jointly by PSU and UWI. In addition to PSU and UWI lecturers and assistants, executives from the private sector have offered to serve as resource people. They will act as presenters, guest lecturers, discussants, reviewers/evaluators, and will validate modules. Their participation will help ensure that the modules are relevant to the private sector and to the Jamaican business environment.

Recommendation: To further ensure relevancy, we recommend that local cases be used as much as possible. These can either be the case studies that were developed in the Mona project or developed through the RDO/C project.

Recommendation: Priority should be given to visiting professors with experience in developing countries, preferably

in the Caribbean. Efforts should be made to acclimate PSU visiting professors to the Jamaican business environment. They should be sent a briefing packet to give them an appreciation of local conditions. (This might include a JAMPRO video on business in Jamaica.) They should also plan to spend time on-island--immediately before the module begins--talking to DOMS staff and local businesspeople. The UWI team member is crucial in providing the Caribbean context and should be given corresponding roles.

Our research and interviews revealed that there was meaningful input from the business community in the design of the program. The program continues to maintain their interest and support, as is indicated in their offers to assist with modules.

We also learned that there is much untapped willingness to contribute to the program. In addition to sponsoring students, some firms--particularly those associated with the Harvard Business School Alumni--are quite amenable to donating funds to the program. Firms who are committed to staff development frequently send staff overseas for second degrees. Since they would save a large sum of money by enrolling their staff in a local program, they figure they will still come out ahead even if they make additional contributions to UWI's program. This sort of assistance will increase the chances of sustainability.

Recommendation: A strategy should be developed whereby firms are invited to contribute to the program beyond sponsorship of students.

There was some interest expressed by the business community in opening up modules of the EMBA to non-degree seeking students. They think particular modules would be valuable to individuals in their firms who, for a variety of reasons, may not wish to enroll in the entire program.

Recommendation: For a second phase of the project, consider the possibility of offering the same or similar modules for non-degree seeking students or opening a few spaces in the program for individuals not enrolled in the program.

Executive Management Development Program. Two seminars have been conducted so far. The first seminar, "Managing the International Enterprise", was held in November 1987 at Ocho Rios. It was attended by 25 people and was well received by the participants. It was designed by the Project Manager and PSU.

The second seminar, "Productivity: The Way Forward", was held in November 1988, again in Ocho Rios. This seminar was coordinated by two DOMS staff, Mr. E. Gibson and Mr. D. Ramjeesingh, with the assistance of the Resident Advisor, Dr. G. Heitmann.

The 1989 seminar is now being planned by Messrs. Gibson and Ramjeesingh. The topic for the seminar is strategic planning. It appears that much of the responsibility for the seminars rests with DOMS staff.

Recommendation: Continue to involve DOMS staff in the design, delivery, and evaluation of the seminars until the seminars are managed completely by UWI, either through IOB or DOMS staff. This will provide opportunities to strengthen their personal relationships with the business community and develop their skills in seminar management, thus contributing to institution building and sustainability of the seminars. By the middle of a second phase, complete responsibility for the seminars should rest with DOMS staff.

From what we could gather, the first seminar met with more success than the second. This was in part due to a cancellation of the expected presenter for the second seminar. The substitute presenter from Penn State was not well prepared for the Jamaican context and his presentation style did not allow him to draw on the expertise of the participants. (Refer to seminar evaluation reports for further details.)

Recommendation: Select presenters who have outstanding reputations or who have some familiarity with the Caribbean business environment. At a minimum, brief the presenter about the economic conditions of the country. The presenter should have a general understanding of the experience of the audience and be prepared to draw on it. A participatory style should be encouraged and lectures should be limited.

The number of planned seminars has been cut back to one per year. There is indeed a demand for executive seminars, as is evidenced by the response to EMDP seminars and those offered by Alcan and others. However, because of the great supply of executive seminars, it was determined that the project would offer one instead of two per year.

Recommendation: Continue to limit the seminars to one per year throughout the remainder of Phase I and II. Near the end of Phase II, assuming there is one, take another look at the quality and demand of other seminars offered in Jamaica, with a view toward meeting the demand, but not flooding the market. A low-risk option may be to conduct half-day seminars on campus on relevant topics not covered by other training institutions.

The charge for the 1988 seminar was J\$2,500, which is subsidized by the project.

Recommendation: The charge for the seminars should be gradually increased until the full economic cost is charged to the participants. Consideration should be given to charging a slightly-higher-than-economic cost, to provide excess funds to be used toward subsidizing smaller firms. By the end of a second phase, the seminars should be self-supported.

Participation in the seminars has been heavily skewed toward large businesses. Invitations have been extended without regard to size, so either the seminar topics are not relevant to small and medium-sized businesses or they are not affordable.

Recommendation: Re-evaluate the intent of the project with USAID. If it is determined that the project should reach out to small and medium-sized businesses, consult with the Small Business Association on ways to attract this population. For any follow on phase of the project, consider holding separate seminars with topics that are particularly relevant to other than large businesses.

Certificate and Diploma Program. The Project Paper called for the Certificate and Diploma programs in Management Studies to be upgraded, and that the Certificate and BSc as well as the Diploma and EMBA be rationalized. This has not yet been done.

Currently under debate is the issue of whether the Diploma program should continue in its present form or be harmonized with the new EMBA program. Also under discussion is whether UWI should divest the Certificate programs to other specialized institutions such as JIM and IMP. UWI would perform the roles of monitoring and accreditation.

Recommendation: Administrators from UWI and JIM, IMP and other training institutions should meet to resolve this issue.

Research Program. With the development of six new cases, the case study component has received more attention than new research projects. No significant progress has yet been made on staff research projects.

In September 1987 a case writing workshop was held which five UWI staff attended. Individuals from this group were subsequently paid to write cases for the EMDP. A second workshop was held in May which targeted new staff. Dr. D. Christy of PSU conducted the workshop. A third workshop will soon be held which will be designed to instruct faculty how to teach with cases.

Recommendation: Promote wider distribution of the cases that were developed through this project and the RDO/C project. Furthermore, faculty should be trained and encouraged to use these and other cases in teaching BSc and EMBA courses.

Recommendation: Encourage FSS staff to write cases, develop instructional materials, and establish data bases with funds from the project or IOB. Other training institutions should be invited to participate.

There are still problems which prevent greater progress on the research component; some attitudinal and some logistical. To date, three research proposals have been submitted for approval and are now with University committees.

One of the possible problems is the teaching loads of senior faculty. The additional staff should greatly ease this, allowing more time for research.

Recommendation: Use the newly trained staff to share the teaching load. If they are not yet fully confident about lecturing, assign them to tutorials or marking to begin.

Another explanation for lack of research projects in DOMS goes back to the earnings issue. Staff members have found it necessary to engage in outside consultancies and training to compensate for their low salaries. Again, this leaves little time for research. Furthermore, since there is currently no payment for research activities, there is even less incentive to participate in it.

Recommendation: IOB should place research on the top of its agenda and begin searching for contracts and funds to pay faculty for research and consultancies which would enhance the academic status of DOMS faculty.

Computer equipment, software (Desktop Publishing), and funds have been given by the project to the Caribbean Finance and Management, a journal started by DOMS staff. This is an important aspect of staff development and provides an outlet for research findings and ideas of DOMS staff.

Recommendation: Attempt to increase the distribution of the journal so that by the end of the project (i.e. Phase III) it is self-supportive. This could be done by working with University Publishers Association, a new organization established to distribute books by Caribbean authors. CFM staff may also consider exchanging advertisements with U.S. and U.K. journals of finance, international business, and economics.

There appear to be some unmet research needs in the private sector that IOB may be able to satisfy. Research topics suggested in interviews with the business community include:

- * performance appraisal systems
- * team building methods
- * industrial averages; profiles of industries
- * market trends by sector
- * computer literacy and utilization
- * marketing

Currently firms go to PSOJ for research or rely on in-house researchers. PSOJ is willing to provide IOB access to their data bases and to consider cooperation on analysis. Initial collaboration may give IOB the added credibility and support it needs.

Recommendation: Arrange access to PSOJ data bases and provide financial assistance to strengthen it.

Firms expressed willingness to open their books to researchers. One of their conditions, however, is that they in turn benefit from the completed research. Again, this points to the need for relevancy, but also the need to follow-up.

Recommendation: Provide the completed research projects to the participating firms.

Internship Program. IOB has not yet approached the topic of internship for BSc students. Most firms interviewed expressed willingness to host an intern, if it is designed to be mutually beneficial. At this point, it appears that firms must simply be asked to participate.

Recommendation: Design a program that includes a thorough admission procedure (i.e., application form, references, brief essay that demonstrates writing skills and interest), academic credit that can be applied toward graduation, compensation to cover expenses, and a monitoring and evaluation system. It may be useful to look at successful internship programs from abroad. IOB staff or a faculty member should be assigned (in exchange for teaching one course) to manage the program.

3. INSTITUTE OF BUSINESS

IOB has been approved and fully accepted by the University, Faculty of Social Sciences, and the Department of Management Studies.

The inaugural meeting of the Board of Directors for the Institute of Business was held January 20, 1989. Attending the first meeting were the Vice Chancellor, 5 representatives from Mona, 2 from Cave Hill, 3 from St. Augustine, 3 from the project, 2 from the private sector, and 1 from another training institution (17 total).

Many of the activities intended for IOB are currently being managed by the project staff (EMBA, EMDP, CFM journal). This is, of course, necessary since there is not yet a director of the Institute.

Recommendation: Advertise for the position of Director of IOB by the spring of 1990. Until the position is filled, the project manager should serve as interim director.

Consultancy services are not yet offered through IOB. There is some concern that senior faculty members will have little motivation to participate in the consultancy services of the Institute. Many of them are busy teaching and consulting on their own. A strong case, including financial incentives, must be made to encourage them to make their services available through IOB.

Recommendation: Establish a committee of FSS staff to develop options to attract faculty to participate in IOB's consultancy service.

The junior staff, on the other hand, is more available to provide services through the Institute. Furthermore, they will see it as a good opportunity to develop a network of clients. However, because of their limited experiences, the demand for their services may be minimal. A strategy must be developed to make their services--i.e., in decision support systems, computer applications to management--more credible in the eyes of the business community.

Recommendation: Form research or consultancy teams with a junior staff member and a senior staff member or a local consultant. This sort of pairing will make the team more credible and provide opportunities for the junior staff person to develop skills through association with more experienced individuals.

Concern has also been expressed that the Institute not be solely for the benefit of DOMS. IOB could be a factor of alienation among the Faculty if not handled properly. It should

also serve as a mechanism to encourage research and consultancies by others in the Faculty of Social Sciences.

Recommendation: Opportunities should be given to all staff of the Faculty of Social Sciences for research and consultancies. Funds should be made available for research in all areas of FSS.

Our interviews with the business community emphasized the need for relevancy and practical application of IOB services. There was notable interest in research, consultancies, internships, EMBA and EMDP, but still many doubt whether UWI faculty can provide relevant and worthwhile services. Given the mission of the Institute to provide an establishment for joint research and programs between educators and business people, it is crucial that the respect between the two be strengthened.

Recommendation: The private sector must regularly be informed of the potential services of IOB. The Vice Chancellor and Board of Directors should host a reception to inaugurate IOB, inviting members of the Faculty of Social Sciences, leaders in the business community, USAID and other international donor agencies. This should be followed by a quarterly newsletter with information about current research, staff introductions (this should build the private sector's confidence in their capabilities), acknowledgements of assistance given, requests for human and financial resources to further assist IOB and DOMS, and information about the EMBA and EMDP.

4. COMPUTER FACILITIES

Members of DOMS staff have begun using the computers. We were pleased to observe two of the new staff using the computers and instructing students on their use. We are also delighted to report that the Executive MBA program begins with two days of computer familiarization.

Included in the computer purchases is a Desktop Publishing system which has been installed to assist in the publication of the Caribbean Finance and Management journal.

Our main concerns with the computer facilities are that personnel be adequately trained in their use, a resource person be readily available to troubleshoot problems and answer questions, and that they be fully utilized.

Recommendation: Conduct short staff seminars (about one hour each) on use of individual software packages. The purpose of these will be to give staff an overview of the

potential application of available software for their teaching, research, and writing.

Recommendation: In addition to the full-time lab manager, hire part-time student lab assistants to troubleshoot problems and answer questions for users.

Recommendation: Make the computer room available on occasional weekends and in evenings for EMBA and part-time students.

Recommendation: Include as part of the curriculum review of each BSc course, an analysis of how computers can be used in the course.

5. LIBRARY AND INFORMATION RESOURCES

A lot of background work has been done for the library and information resources, but no procurement has taken place to date. This is largely due to budgeting problems which have been recently resolved.

Ms. Margaret Smith, PSU Librarian, visited UWI and Mr. Michael Williams, a DOMS staff member, visited Penn State to discuss the list of textbooks and journals for the UWI collection. The list includes books for the BSc, MSc, EMBA, certificate and diploma courses. The list was prepared from inputs from DOMS staff, UWI and PSU librarians.

PSU donated a set of management texts to DOMS. These were selected by the Head and staff of DOMS during their consultation visits to Penn State.

We found some interest in the business community in having access to the University library's collection of management literature.

Recommendation: Propose a change of policy to the University that will allow access to the library of non-students.

Recommendation: Designate a reading room for management studies within the current library facility. This area could also house the collection of management studies resources and would be available to the general public. We recommend that the private sector provide funds for this. Any follow on phase may consider expanding the physical facilities to accommodate a management library. In the meantime, the library should be cleared of out-of-date books to make way for the new books.

Mutual Life should be the first to be approached about donations in behalf of the library, since this recommendation was generated through discussions with Gloria Knight. Because we did not bring this up in other interviews, UWI may wish to do a more thorough survey to verify the demand for access to the management studies collection before money is invested in such an endeavor.

6. CONSTRUCTION AND REFURBISHING

The official opening of the building was held May 4, 1989. The hurricane, air conditioning and electrical problems caused delays.

In the previously existing structure the lecture theatre was renovated. The new structure provides a classroom, seminar room, five offices, student and faculty lounges, a computer lab, a room to house the Management Information Centre for students, circulation and seating area for students, and two lavatories. Overhead projector screens have not yet been installed in the classroom or seminar room.

Recommendation: Give greater attention to procurement of audio-visual equipment. Overhead projector screens should be installed before commencement of the EMBA. All staff should be trained on use of AV as part of their lectures.

B. PROJECT ENVIRONMENT AND ASSUMPTIONS

Jamaica continues to experience a shortage of skilled managerial manpower which has been identified by a number of studies and assessments. This shortage of mid- to upper-level manpower remains a critical constraint to economic growth and development. Projections prepared by the Planning Institute of Jamaica support the view that the demand for managers will continue to grow. PIOJ forecasts for the period 1985-1990 are for an incremental demand for between 2777 and 3328 managers. There is reason to believe that this estimate is a baseline for the period 1989-1994. Table 4 contains the projected demand by major administrative categories.

TABLE 4
Incremental Demand for Administrative Personnel
1985-1990

	<u>Low est.</u>	<u>High est.</u>
Executive and Senior Managers	32	53
Administrative Occupations	110	204
Directors and Managers	1908	2235
Administrative Specialists	217	273
Other Managers	<u>510</u>	<u>563</u>
TOTAL	2777	3328
(Private Sector Only)	(2635)	(3017)

Source: Planning Institute of Jamaica

1. GOAL AND PURPOSE LEVEL

Assumption: Trend for increased demand for management studies courses will continue.

The demand for managerial personnel translates into an increasing level of unsatisfied demand for places in management studies courses. For example, in 1985/86 there was an unsatisfied demand of 78.7 percent for full-time study in the management studies program. By 1989/90, the unsatisfied demand had grown to 84.2 percent in this program. The details with regard to other DOMS programs appear in Table 5. In view of this evidence, we believe that the trend will continue.

TABLE 5
 Qualified Applicants and Places Offered
 1985/6 and 1989/90

<u>Option</u>	<u>Applicants</u>	
	1985-86	1989-90
<u>Management Studies F.T.</u>		
Applicants	169	235
Places offered	36	36
Unsatisfied Demand	133	199

Assumption: New staff employees will be at lecturer's level by end of Phase I.

During the first phase of the project, a total of nine new staff persons will have completed the MSc at Penn State University. As of June 30, 1989, a total of three persons have completed their training and returned to DOMS. Three staff members--Rosemarie Clarke, Michael Houghton and Audley Harris--have been appointed as Assistant Lecturers and are involved in teaching modules in managerial accounting, introduction to data processing and systems analysis, as well as assisting with the teaching of tutorials.

The University's standard requirement for promotion to lecturer status is two years of service for staff persons with a MSc degree, provided that they also present some evidence of research in progress. The University is applying special rules to these graduates, so it is likely that three of the newly returned assistant lecturers will be appointed lecturers by the end of Phase I.

To increase the likelihood, it will be essential for the resident advisor, project manager, and senior DOMS staff to work closely with the new staff members to guide them in their research activities and provide needed support in their teaching assignments. The burden of beginning an onerous new assignment and carrying out research activities will require project and departmental support. However, if this is provided it is likely that the assumption will be met in the year following the end of Phase I.

Assumption: All approved staff positions will be filled.

At the initiation of the project, DOMS had sixteen positions

of which six were vacant. Since September 1987, the number of available full-time positions has been increased from sixteen to eighteen. However, during this period DOMS lost one staff member due to death and two further key staff persons have resigned to assume other duties effective 1989/90. In addition, one senior lecturer will attain retirement age in 1990. Effective staffing for the 1989/90 year will be sixteen full-time staff with two vacancies and twenty-three part-time faculty. An additional four junior staff persons will be sent to Penn State in 1989/90 and will be expected to return in September 1990. It is therefore anticipated that the staffing situation will continue to be difficult throughout Phase I in view of the high degree of inexperienced assistant lecturers.

The DOMS 'depth index' is estimated at 4.6 for 1989/90 equal, to the level in 1984/85, but a significant improvement over the 3.9 recorded in 1985/86 in the report prepared by Dr. Marshall Hall in 1985.

TABLE 6
Projected Full-Time Staffing
1989-1991

	<u>1989/90</u>	<u>1990/91</u>
Professors	1	1
Senior Lecturers (includes Fulbright Prof)	4	2
Lecturers	5	9
Assistant Lecturers	7	7
Total staff	17	19
Available positions	18	19
Vacant positions	1	0

This assumption will be met by the final year of Phase I, despite a set of adverse conditions involving retirement and deaths of senior faculty members.

Assumption: Two existing staff members will advance to senior lecturer.

It is unclear at this point whether this assumption will be operative. At the present moment, no DOMS staff member appears ready for promotion to senior lecturer as a result of professional qualifications or publications.

2. OUTPUT AND INPUT LEVEL

Assumption: Two new staff positions will be approved for DOMS. Staffing will include consideration of attrition.

As noted above, two additional positions were approved for DOMS, raising its staffing from sixteen to eighteen full-time faculty.

Assumption: New course offerings for BSc and new EMBA program will be approved by UAC.

New EMBA course offerings have been approved by UAC. The EMBA may now be considered an integral part of the University's curriculum.

With regard to the BSc, there were revisions in the syllabi of several courses, however, new course offerings were not proposed. It is expected that substantial changes in the BSc curriculum will occur with the shift toward the semester system in the 1990/91 academic year.

Assumption: The Institute of Business will be approved by Finance and General Purposes Committees.

Effective January 1989, IOB was approved and had its inaugural meeting on January 20, 1989.

Assumption: Project inputs will be available in a timely manner.

Mastering USAID's budgetary procedures proved to be a formidable hurdle. Misunderstandings about budgetary advance caused some problems since there was no cushion to finance the project's cash flow. This resulted in a delay in the supply of some project inputs as well as depletion of project resources due to high interest charges. For example, the UWI library has not yet been able to purchase a single book with project funds. Nevertheless, this limitation has been resolved.

The project environment has remained stable since the project paper was prepared. The project's assumptions remain valid with regard to most of the issues.

C. CONTRACTOR PERFORMANCE

The principal functions of Penn State, as delineated in their contract with UWI, include providing assistance, advice and related deliverables in seven general areas:

- (1) in-service training and staff development
- (2) logistical arrangement for overseas training
- (3) teaching selected courses
- (4) curriculum development
- (5) instructional materials
- (6) research projects and case studies
- (7) new institutional structure and programs

Generally, the collaboration with PSU has been seen as necessary and positive. To give the project legitimacy it was essential to be associated with an overseas institution. They have indeed performed this role. It is not as obvious, however, that by the end of Phase I they will have met their contractual agreement with UWI and whether they will have contributed to institution building. Overall, the cost to UWI/USAID for the perception and legitimacy, according to a majority of individuals interviewed, has been worth it. At this point it is unclear whether association with PSU will be cost-effective throughout Phase II and III of the project.

1. LONG-TERM RESIDENT ADVISOR

This section will briefly review the contributions of the resident advisor and end with a general conclusion and recommendation.

Dr. George Heitmann assumed the position of resident advisor in March 1988. Before his arrival in Jamaica, Dr. Heitmann was involved in project planning and made several trips to Jamaica. In August 1989, Dr. Heitmann will leave Jamaica to resume his duties at PSU. Upon his return, Dr. Heitmann will serve as PSU/CBA's coordinator of international programs.

Relationships with DOMS Staff. Because of initial contractual problems, the relationship with DOMS had a rocky start. The problems were quickly resolved, although not forgotten. The memory of these problems is exacerbated by his position as a "new guy on the block" among a group of long-time colleagues. He is considered, by most, as an outsider. Many see him only associated with the project, and not part of the Department. This may improve, however, now that he is participating in faculty meetings. When the resident advisor begins teaching EMBA modules (and hopefully BSc course), this attitude may further dissipate.

Staff Development. The evaluation of staff capabilities and assessment of training needs was completed early in the project. By September 1989, nine new staff will have been sent to PSU for training. Unfortunately, however, there was no clear strategy for what to do with the new staff when they returned. Very little has been done by the resident advisor to remedy this situation.

The resident advisor is responsible for in-service training. He has successfully coordinated staff development workshops on the following topics:

- * case writing (10/87, 5/89)
- * development planning (3/89)
- * research (5/88)
- * executive development programs (6/88)
- * accounting (12/88)

Program Development. With regard to the EMDP, the resident advisor has been particularly active. He played an integral role in planning and organizing the 1987 and 1988 seminars. He also submitted detailed and useful evaluation reports for each seminar.

The EMBA is fully organized and ready to begin July 31, 1989. Dr. Heitmann will teach modules in statistical analysis for decision making. He has also been active in recommending structure, instructional approaches, and staffing options for the program as well as coordinating PSU involvement.

In terms of the BSc, not much has been done on this by either the resident advisor, project manager, or DOMS staff. Although a few efforts have been made, it has clearly not been a priority.

Research and Development. The resident advisor assisted in the development of case studies and coordinated two case writing workshops. He is planning a third workshop on the use of case studies in teaching.

The project still lacks adequate progress in research, introduction of instructional materials, an internship program and the Executive in Residence program. To some degree this is attributable to the low level of input from the resident advisor and PSU technical assistants.

Institutional Development. The resident advisor has been marginally involved in the establishment of IOB. Again, this has not been given priority attention in the project. And, as in several other areas, it took considerable time to obtain university approval, hence there has been little for him to do in this regard.

Liaison and Coordination. The project now relies almost exclusively on the project manager's business network, while the resident advisor has done very little to change this situation. The project would benefit from more intense involvement with the business community on the part of the resident advisor. To some extent, this requires personal interaction between the resident advisor and individuals in the business community. However, since the resident advisor may change from time to time, it is important to institutionalize the relationship between the project and the private sector. The resident advisor should seek ways to do this.

The resident advisor has been somewhat delinquent in providing reports and workplans as required. For example, the Quarterly Report for the period January - March 1989 has not yet been submitted. (It is for this reason that some of the data in this section of the report may not be up-to-date.)

The resident advisor has been helpful in terms of coordinating PSU technical assistance. About a dozen PSU faculty have visited UWI and virtually all the UWI staff and relevant administration have visited PSU.

While being quite effective in several areas, the resident advisor has generally not consistently assumed a pro-active role in the project.

Recommendation: With the arrival of a new resident advisor, expectations and roles should be clarified with respect to:

- * counselling new staff member in developing research interest and skills
- * developing a mechanism for routine follow-up (i.e., initiating an IOB newsletter)
- * teaching at least one course per term
- * developing personal and institutional relationships with the business community

2. SHORT-TERM TECHNICAL ASSISTANCE

To supplement the expertise of the resident advisor, the contract provided for short-term technical assistance from other members of the PSU/CBA staff. Project implementation schedules show numerous planned visits by PSU faculty and administration, and frequent postponements and cancellations.

There have been, however, eleven completed visits by PSU staff. Table 7 shows the name, date, topic and type of assistance provided by PSU. Several have produced timely and relevant workshops and reports (i.e., case writing and consultation on

accounting), while others have provided only marginal benefits to UWI (i.e., the visit by the librarian).

TABLE 7
Short-Term Technical Assistance

<u>Name</u>	<u>Date</u>	<u>Topic and Type of Assistance</u>
Dr. G. Heitmann	Oct 87	Case Writing -workshop
Dr. G. Heitmann	Nov 87	EMBA. EMDP -consultation
Dr. F. Ghadar	Nov 87	Int'l Business -EMDP seminar presentation
Ms. M. Smith	Apr 88	Library Planning -consultation
Dr. P. Rigby	Jun 88	Research Programme -workshop/report
Dr. A. Vicere	Jun 88	EMDP -consultation
Dr. C. Snow	Nov 88	Organizational Behavior -seminar presentation
Dr. B. Schrader	Dec 88	BSc Accounting Certification of Acctg Accounting Research
Dr. W. Millman	Feb 89	Development Planning -workshop
Dr. D. Christy	May 89	Case Writing -workshop

PSU has provided timely and substantive technical assistance in:

- * case study writing
- * research planning and organization (this area needs considerable follow-up)
- * accounting and MIS
- * library resources
- * Executive Management Development Program

Recommendation: The remainder of Phase I should focus on PSU meeting their contractual agreements in the following areas:

- * BSc program review
- * integration of computers into BSc
- * communication/instructional aids

- * teaching in EMBA
- * planning and external relations
- * establishment of a library data base

3. INSTITUTIONAL SERVICES AND OVERALL PERFORMANCE

The relationship between PSU and UWI has not realized the benefits that can come from university twinning. Some of the problems may stem from inadequate coordination from the PSU campus. This may improve with Dr. Heitmann as the coordinator of PSU/CBA's international programs. As coordinator, Dr. Heitmann should be helpful in building support and enthusiasm among PSU staff for their participation in the project.

It is unclear at this juncture whether UWI and USAID have received adequate services for their payments. While they have performed satisfactorily in some areas, a view expressed by most persons contacted is that their overall performance was lacking. No member of UWI faculty felt that they received sufficient academic support from PSU.

Recommendation: Monitor performance of the contractor closely to ensure that there is significant improved performance by January 1990 in areas for which achievement of their obligation is currently lagging. If their performance has not improved significantly, consider reopening the bidding for a university or group of universities (preferably an existing consortium) for Phase II. Priority should be given to universities with interests in the Caribbean.

There is reason to believe that between DOMS staff--at Mona, Cave Hill and St. Augustine--and the local business community, there are sufficient resources to maintain the quality of the project. For the EMBA, a number of successful Jamaican executives--with strong academic backgrounds--have formally expressed interest in and availability to assist. No one need doubt the quality of their potential contributions; in the 1989 EMDP seminar, for example, Dr. Keith Panton (Alcan Jamaica) received the highest ratings in every category, while Dr. Charles Snow (PSU) received the lowest.

Recommendation: Before the end of Phase II, consider the need for a long-term contract with any U.S. university for Phase III. If it is determined that UWI cannot provide adequate staffing, consideration should be given to greater use of the Fulbright Scholar program, the International Executive Service Corps, Personal Services Contracts, or short-term contracts with U.S. universities.

D. UNIVERSITY COMMITMENT, SUPPORT AND ACTIONS

This section addresses the extent to which project activities are attracting support from faculty in other parts of the UWI. In addition, we will provide some observations regarding the degree of support within the DOMS.

1. UNIVERSITY FRAMEWORK

The University of the West Indies is a complex institution. It is comprised of campuses located in three different countries and separated by a thousand miles of ocean. It takes the better part of a day to travel from the Mona campus to Cave Hill or St. Augustine. Apart from distance, the fact that it is administered as a single entity with strictly defined but limited autonomy for each campus provides an unusual degree of difficulty in the coordination of policy. For example, in order to change the syllabus in a particular course, an individual department must secure the approval from the other two campuses. Individual departments, generally jealously guard what they perceive to be their "turf". As a consequence, and as is common in many university settings, coordination between departments and programs is not always readily achieved. Moreover, the introduction of a new program or activity is often met with suspicion. With this background in mind we may discuss the support for the project in other parts of the University.

2. SUPPORT WITHIN THE DEPARTMENT OF MANAGEMENT STUDIES

The initiation of the project was not received with wholehearted support from all members of DOMS. Some members see it as an imposition from without, some view it as an affront, while to some it is an idea based on a faulty premise. The issue is not the merits of these arguments but the degree of commitment. Our evidence indicates that to date eight of the Department's 13 full-time staff members (1988/89) have had more than marginal involvement in the project. To illustrate, only 3 members of DOMS staff attended the case writing seminar, despite the fact that it was scheduled to not conflict with other UWI commitments. Nevertheless, the proportion who are involved is likely to increase steadily with the entry of the newly trained staff and the retirement of others. The reason behind this is that senior staff see little to be gained by involvement, while junior staff members can see clear advantages in the areas of research. However, the point to be made is that if DOMS staff members are not enthusiastic about the project it is difficult for them to reach out and attract support and involvement from other departments. As a consequence, involvement from without tends to occur in response to administrative initiatives.

Not much has been done since the beginning of the project to unite DOMS staff with the project. It is our view that the limited degree of commitment and involvement by DOMS staff is in part attributable to the performance of the contractor. Awkwardness in communication and an unwillingness to take a proactive approach have done little to kindle departmental support. We believe these problems can be diminished if the resident advisor is more involved with DOMS.

Recommendation: The new resident advisor should make an effort to be more integrated in DOMS and be required to teach at least one course in DOMS.

3. SUPPORT FROM THE FACULTY OF SOCIAL SCIENCES

There are growing signs of identification with and support for the project from faculty outside the DOMS. The sluggish support, however, should not be regarded as particularly unusual in an organization whose culture is substantially individualistic and where all social sciences faculty members carry heavy teaching loads. Nevertheless, there is need to intensify and broaden this support.

Despite the general picture, there is interest in management studies among specific faculty members. Noel Cowell, a lecturer in economics, has been teaching the personnel management and industrial relations course. Carl Stone, professor of government, has served as a moderator in the course Caribbean Business Environment. Dr. Claude Packer from economics and Professor Norman Girvan, director of the Consortium Graduate School, have expressed an interest in lecturing in the EMBA. Claremont Kirton, lecturer in economics is willing to consider redesigning his course on monetary economics (which presently has about 60 percent of its enrollment from management studies) to better accommodate the curricular needs of management studies students. (This would be framed within a practical institutional understanding of money and banking.) Some staff members of the Department of Sociology may be interested in course development and teaching in the area of business and society, and business ethics.

Recommendation: The project manager, resident advisor, and DOMS Head should seek to develop more contact with the FSS through joint seminars, joint research activities and lectures to the EMBA.

In addition, members of the economics department are interested in cooperative research activities. Research topics which were mentioned include (1) case studies of Jamaican financial bank and non-bank institutions; (2) case studies of

micro-enterprises; (3) management and organization of micro-enterprises and informal producers; and (4) developing training manuals for micro-enterprise start up (this could build on work done by IICA). The project manager has proposed that research projects be planned and implemented by research teams consisting of staff members from the DOMS and the FSS in order to build on the established research skills of FSS faculty members.

There is an interest in cross-department collaboration in research and curriculum development. In the remaining portion of Phase I, a priority should be the nurturing of such collaboration. It may be worthwhile to develop a brochure outlining the research and consulting accomplishments of DOMS and FSS personnel for use in securing research contracts.

Recommendation: Earmark project funds for curriculum development and joint research activities between the DOMS and members of other FSS departments, particularly the Department of Economics.

It will be noted that most of this involvement is still at the level of intent. In order for intentions to be translated to actions, money will have to be obligated and earmarked for joint research activities and for curriculum development. In addition, approval will have to be secured from departments on other campuses for any additional curriculum changes. It must be recognized, however, that research projects take some time to crystalize.

4. THE LIBRARY

The University Library reports that it has not been properly involved in the project. Initially there appeared to be some confusion as to whether materials would be placed in the library or the DOMS Management Information Center. Currently the difficulty revolves around release of project funds and a lack of clarity with regard to how much money is in fact available. The head librarian has reviewed the Harvard Library Core Collection catalogue and selected appropriate texts. There is an interest in closer collaboration and a desire to upgrade a collection which is woefully outdated. (Less than 5 percent of the management books on the shelves are more recent than 1980.)

5. UWI ADMINISTRATION

It is readily apparent that the administration of the UWI is unequivocally committed to the implementation of the project. The Pro Vice Chancellor for Planning has worked with the project manager to facilitate university decision making on critical issues (e.g., approval of the IOB). It is evident that they see the project

as a vehicle to enhance their contacts and credibility with the business community and possibly to mobilize that constituency for the purpose of strengthening their financial base.

The administration is committed to getting full value from the project and has been disappointed with the level of academic inputs provided by the contractor to date.

With regard to staffing they are pleased with the entry of new staff and will support their retention, provided that they perform as expected, i.e. carry out research and publish the results. They are prepared to support junior staff in pursuing studies to the PhD or DBA if project funds are available.

6. OTHER UWI FACULTIES

Recommendation: Incorporate the staff of Public Administration within a School of Management Studies.

There are four reasons why this step is appropriate at this time. First, in view of the outlook for staffing levels in the DOMS there will be few faculty above the lecturer level. Combining DOMS with this part of the Department of Government will bring in one professor and one senior lecturer. In addition, the faculty of public administration tend to have stronger research records than those in DOMS.

Second, incorporating three additional full-time faculty will assist in reducing the excessive number of students per full-time faculty member.

Third, is the issue of the Diploma in Health Management. This program began in 1982 with support from USAID. In Fall of 1988 all USAID funding stopped, and the status of program is unclear due to a lack of adequate staffing. It appears worthwhile for the University to protect its investment in the development of this worthwhile program. Bringing the two departments together would open the door for students wishing to concentrate in health administration to take either a diploma in public administration or management with a concentration in health administration. Maintaining this program would make UWI eligible to receive assistance through the Association of University Programs in Health Administration which receives funding from USAID and the Kellogg Foundation for faculty staff development and short-term consulting for management curriculum development.

The fourth reason why combining these programs makes good sense is that it would strengthen the curricular offerings in both departments. It would improve the range of issues to which

future public administrators are exposed; issues such as accountability, management by objectives and the use of managerial controls.

Finally, it is desirable to train public and private sector managers together. Promoting interaction at an early stage in their careers will strengthen trust and communication between these future Jamaican leaders. This cannot fail to redound to the benefit of the entire society in the form of more effective management in both sectors of the mixed economy.

In summary, support for the project in the UWI is uneven. It appears strongest at the level of the University administration and among the most junior faculty. It is the view of the evaluators that a more proactive role by the contractor would have resulted in a different situation. There was inadequate academic input by the contractor, limited interaction with staff and limited contact with other departments.

E. INTERACTION WITH THE BUSINESS COMMUNITY

Project files reveal deliberate and frequent communication between the project staff and individuals from the private sector. Table 8 charts the formal efforts the project has made to solicit input from the business community.

TABLE 8
Interactions with the Jamaican Business Community

<u>Format</u>	<u>Date</u>	<u>Topic</u>
Breakfast Meeting	Jul 87	Info about project Launch EMDP
Local Plng Team Mtg	Aug 87	Plan EMDP
Local Plng Team Mtg	Sep 87	Approve EMDP seminar
EMDP Seminar	Nov 87	Seminar
Proj. Advisory Committee (PAC) Mtg	Mar 88	Inaugural meeting
Working Meetings (Pub/Pri Sectors)	Apr 88 Apr 88	Gather ideas about BSc, EMBA, EMDP
PAC Meeting	Apr 88	EMBA
PAC Meeting	Jun 88	EMBA, IOB
Luncheon Meeting (Pub/Pri Sectors)	Jun 88	EMBA, EMDP
Local Plng Team Mtg	Jun 88	EMDP
Luncheon Meeting	Oct 88	Launch 2nd Seminar
EMDP Seminar	Nov 88	Seminar
Board Meeting	Jan 89	Nature/scope of IOB
Luncheon Meeting	Feb 89	BSc, EMBA
Luncheon Meeting	May 89	Resources people for EMBA

Several groups with representatives from the business community have been formed to provide guidance to the project. These include:

- * Local Planning Team
- * Project Advisory Committee
- * IOB Board of Directors

These groups appear to be providing valuable input into the project: the Local Planning Team offers advice on EMDP seminar topics, format, and methodology; the Project Advisory Committee provides guidance on overall direction of the project, including EMDP, EMBA, BSc, and IOB; and the recently-formed Board of Directors of IOB will guide research, consultancies, internships, and other programs administered by IOB.

It is impossible to document the frequency of informal communications between the project manager, for example, and individual business people. His efforts are constant and he takes full advantage of opportunities to strengthen the link. In fact, he chose to accompany us on many of our interviews with the private sector. This demonstrates his desire to build rapport with them and seek their ideas about how the project can be more effective.

Much of the credit for the strong link between the project and the private sector, therefore, goes to the project manager. He is well-known and respected in the community and capitalizes on his network to benefit the project. Recognition must also be given to the new Vice Chancellor who has made momentous efforts to narrow the gap between the two communities. He has been especially effective in petitioning the private sector for financial assistance.

It should be noted that some efforts to link the private sector and the University have been initiated by the business community. The best example of this is the Harvard Business School Alumni Club's unsolicited offer to make their companies available for case study research, to contribute human and financial resources, and to fund Harvard visiting professors.

The BSc Program. The BSc-Management program is generally well regarded among the private sector. This fact is manifested in the continual demand for BSc-Management graduates, which exceeds the demand for graduates from any other UWI department. Our interviews revealed a bias in favor of UWI's BSc graduates over CAST and all other training institutions. (Since our sample was not completely random, we do guarantee that this is a representative opinion.) Furthermore, our interviews did not suggest a strong need to make changes in the program.

The EMD Program. The input from the private sector has been especially strong in this area; individuals from the business community have assisted in the planning, delivery, and evaluation of the two seminars. Representatives from Jamaican businesses serve on the Local Planning Team to develop the themes, methodology, and activities of the seminars. Several local business people have assisted as resource persons at the seminars. Some of the seminar participants have formed themselves into an informal alumni which DOMS can access for assistance and resources in future workshops.

The EMBA Program. Again, frequent and significant dialogue has taken place to assist in the development of the EMBA program. In addition to the input given by the Project Advisory Committee, several luncheon meetings have been held to solicit ideas from the business community. As a result of the recommendations, emphasis on courses in finance, marketing, and human resource development have been incorporated into the programme.

A recent luncheon was held to update the private sector on the progress of the EMBA program and to request their participation in the program. Responses to the questionnaire distributed at the luncheon exhibited a commitment to participate as presenters, guest lecturers, course validators/evaluators, and resource persons.

Institute of Business. Several representatives from the private sector serve on the Board of Directors for IOB. Additionally, the business community has demonstrated support of IOB by offering their participation in the following IOB activities:

- * Research
Companies are willing to give access to data which DOMS staff can use for development of cases and for research projects.
- * Internships
There was overwhelming support for the idea of internships. Most firms are willing to host interns for academic terms or longer.
- * Consultancies
At this point, the business community is not strongly predisposed to going to IOB for consultancy services. This may be in part due to their awareness of the qualification of UWI staff, but also associated with the long-held perceptions of UWI staff.

There is much evidence to point to the conclusion that the private sector strongly supports UWI, DOMS, and project. Furthermore, they are willing to offer staff time to virtually all aspects of the project (the Executive in Residence was the only idea that met any resistance). Some indicated a willingness to endow chairs and provide other forms of financial support.

The main concern raised through the interviews is that the project and DOMS programs should make deliberate efforts to be practical. They suggested that the best way to assure success in the project, to produce well-qualified graduates, and to effectively address Jamaica's need for competent mid and upper managers, is to continually build the link between the University and the private sector. This concern suggests that there is some doubt in the University's ability to handle all it has set out to do with the project.

There are significant data that demonstrate that the project has consulted the private sector on project development. Their efforts to seek input from the private sector were seen in the initial stages of design and continue through implementation and

monitoring. The major weakness in their contact with the business community is the lack of follow-up.

Recommendation: Publish a quarterly newsletter with information about current research, staff introductions (this should build the private sector's confidence in their capabilities), acknowledgements of assistance given, requests for human and financial resources to further assist IOB and DOMS, and information about the EMBA and EMDP.

F. INTERFACE WITH MANAGEMENT TRAINING INSTITUTIONS

Contact between the project and other training institutions has been worthwhile though somewhat limited. In May 1988 the project hosted a meeting with representatives of nine institutions. They were briefed on the project as well as UWI accreditation. The institutions requested assistance in providing guidelines for accreditation, faculty development and curriculum development. They also requested continued structured meetings.

1. IMP

Contact with IMP, the organization from which the project manager has been seconded, is regular and extensive. There is a close working relationship and cooperation on matters such as the selection of students for the joint IMP/UWI BSc, a program which has been ongoing for 8 years. IMP staff was invited to attend the case writing workshops but did not attend.

2. JIM

In contrast, the director of JIM contends that the frequency of contact with the project has been scant. The resident advisor spoke to JIM's 1987 Annual Management Convention, and was well received. JIM was invited to a case writing workshop and sent a representative.

3. ADMINISTRATIVE STAFF COLLEGE

Contact with the Administrative Staff College has likewise been sparse. The staff of the college was not invited to the executive development seminars and was not aware of the existence of the EMBA. However, there is a clear interest in the project in view of several new directions in the training of civil servants, particularly with respect to public financial accountability and performance budgeting, topics covered in most courses on managerial finance.

The acting director of the Administrative Staff College expressed an interest in sending senior civil servants to attend the EMBA to develop a better comprehension of fiscal accountability and management controls, MBO, and human resource management. She indicated that such coursework would be particularly relevant to staff members of the ASC, senior civil servants and managers in statutory boards. The difficulty in releasing such senior managers for overseas training makes a local EMBA particularly attractive. In addition, it would be far cheaper for the government to pay the economic cost of US\$12,000 annually for training through DOMS than to send staff abroad at an estimated cost of US\$70,000 per

year. Add to this the desirability of training public and private sector managers together so that they will be better able to communicate and understand each other's interests and motives while building a basis for trust and cooperation.

Several issues were raised when representatives of these institutions were asked to suggest areas for future interface and cooperation. First and foremost, the number one item mentioned by each interviewee was accreditation of coursework for UWI credit. In each case, the institutions are interested in determining which elements of their curricula meet UWI requirements and standards. It is our understanding that the training institutions were provided with some information regarding how to apply for accreditation of courses. There appears, however, that there appears to be some outstanding confusion with regard to this item.

Recommendation: Efforts should be made to facilitate the accreditation of courses from related management institutions. The curricula of these programs should be scrutinized to determine which courses if any merit acceptance by the university. Advice should be provided to the training institutions regarding how they might improve their offerings to gain accreditation.

Recommendation: Further structured meetings should be held with training institution representatives to promote greater collaboration and coordination of activities.

Recommendation: Efforts should be made to recruit a contingent of public sector managers for future EMBA classes.

G. REGIONALISM

The regional nature of UWI, insofar as it affects the USAID/Jamaica project, has been considered throughout the project. Consideration of regionalism was evidenced in the approval process for the EMBA and IOB, for example, as all campuses must sanction such actions.

III. SUMMARY OF RECOMMENDATIONS

PROJECT INPUTS AND OUTPUTS

A. STAFF DEVELOPMENT

1. If there is a Phase II, it should include opportunities for selected faculty members to go the United States to complete PhD training.
2. With guidance from PSU--and through IOB-- explore strategies for addressing the compensation issue. One option is to solicit financial support from the business community to top off salaries or endow chairs. This would not only address the issue of training, but recruitment, retention, and research. Another option is to promote contracted research and consulting. (Members of the business community suggested that faculty should be able to earn an additional US\$20,000 to 40,000 per year in consulting.) A third option is to provide for joint appointments.
3. DOMS should continually evaluate the gaps between faculty expertise and curriculum deficiencies. A concerted effort should be put into recruiting appropriate people-- junior or senior staff--to fill the curricular gaps.
4. For the remainder of Phase I, the project staff, resident advisor, and DOMS should work together to develop a strategy for fully and effectively assimilating the new staff in the Department. Special attention should be given to developing their teaching skills, and capacity and motivation for research.
5. Make more systematic use of Fulbright Scholars, Harvard Business School Alumni, and local resources.
6. The project and DOMS should address the issue of part-time faculty in a future committee meeting. If still viewed as appropriate, the qualifications and teaching performance of all individuals who are now teaching on a part-time basis in the Department should be examined. Upon review, all qualified staff should be accorded more attractive titles such as Associate Lecturer or Adjunct Lecturer. The appointments should be reported to the press and the changes should be reflected in all UWI literature (i.e., catalogues and brochures).
7. The project staff should host other luncheons of this nature to recruit resource persons for the EMBA. They should also use this approach to enlist support for research activities, internships, and participation in the BSc and Executive Management Development Programs. The importance

of follow-up cannot be overemphasized. At a minimum, a letter should immediately be sent to the respondents expressing appreciation and indicating next steps. They should periodically be informed of the progress of the project to maintain their interest and commitment to it. A newsletter or letter are recommended for achieving this.

8. The project staff should make contact with Alcan regarding the post they were previously willing to fill for the Executive in Residence. They should also canvass the business community occasionally for other firms willing to provide an Executive in Residence.

B. PROGRAM DEVELOPMENT

1. The workshop for review of the BSc program---which was previously scheduled for November 1988--should be held by November 1989.
2. Consider making more spaces available for the second class, given the demand for the program. Filling the class to capacity will not only better meet the demand, but will make the program more cost effective.
3. Maintain the EMBA as a part-time program to allow participation of currently employed professionals. This will help prevent flooding the market with unemployed or underemployed MBA graduates.
4. To further ensure relevancy, we recommend that local cases be used as much as possible. These can either be the case studies that were developed in the Mona project or developed through the RDO/C project.
5. Priority should be given to visiting professors with experience in developing countries, preferably in the Caribbean. Efforts should be made to acclimate PSU visiting professors to the Jamaican business environment. They should be sent a briefing packet to give them an appreciation of local conditions. (This might include a JAMPRO video on business in Jamaica.) They should also plan to spend time on-island--immediately before the module begins--talking to DOMS staff and local businesspeople. The UWI team member is crucial in providing the Caribbean context and should be given corresponding roles.
6. A strategy should be developed whereby firms are invited to contribute to the program beyond sponsorship of students.
7. For a second phase of the project, consider the possibility of offering the same or similar modules for non-

degree seeking students or opening a few spaces in the program for individuals not enrolled in the program.

8. Continue to involve DOMS staff in the design, delivery, and evaluation of the seminars until the seminars are managed completely by UWI, either through IOB or DOMS staff. This will provide opportunities to strengthen their personal relationships with the business community and develop their skills in seminar management, thus contributing to institution building and sustainability of the seminars. By the middle of a second phase, complete responsibility for the seminars should rest with DOMS staff.
9. Select presenters who have outstanding reputations or who have some familiarity with the Caribbean business environment. At a minimum, brief the presenter about the economic conditions of the country. The presenter should have a general understanding of the experience of the audience and be prepared to draw on it. A participatory style should be encouraged and lectures should be limited.
10. Continue to limit the seminars to one per year throughout the remainder of Phase I and II. Near the end of Phase II, assuming there is one, take another look at the quality and demand of other seminars offered in Jamaica, with a view toward meeting the demand, but not flooding the market. A low-risk option may be to conduct half-day seminars on campus on relevant topics not covered by other training institutions.
11. The charge for the seminars should be gradually increased until the full economic cost is charged to the participants. Consideration should be given to charging a slightly-higher-than-economic cost, to provide excess funds to be used toward subsidizing smaller firms. By the end of a second phase, the seminars should be self-supported.
12. Re-evaluate the intent of the project with USAID. If it is determined that the project should reach out to small and medium-sized businesses, consult with the Small Business Association on ways to attract this population. For any follow on phase of the project, consider holding separate seminars with topics that are particularly relevant to other than large businesses.
13. Administrators from UWI and JIM and IMP and other training institutions should meet to resolve this issue.
14. Promote wider distribution of the cases among the several campuses of UWI.

15. Encourage FSS staff to develop cases, develop instructional materials, and establish data bases with funds from the project or IOB. Other training institutions should be invited to participate.

16. Use the newly trained staff to share the teaching load. If they are not yet fully confident about lecturing, assign them to tutorials or marking to begin with.

17. IOB should place research on the top of its agenda and begin searching for contracts and funds to pay faculty for research and consultancies which would enhance the academic status of DOMS faculty.

18. Attempt to increase the distribution of the journal so that by the end of the project (i.e. Phase III) it is self-supportive. This could be done by working with University Publishers Association, a new organization established to distribute books by Caribbean authors. CFM staff may also consider exchanging advertisements with U.S. and U.K. journals of finance, international business, and economics.

19. Arrange access to PSOJ data bases and provide financial assistance to strengthen it.

20. Provide the completed research projects to the participating firms.

21. Design a program that includes a thorough admission procedure (i.e., application form, references, brief essay that demonstrates writing skills and interest), academic credit that can be applied toward graduation, compensation to cover expenses, and a monitoring and evaluation system. It may be useful to look at successful internship programs from abroad. IOB staff or a faculty member should be assigned (in exchange for teaching one course) to manage the program.

C. INSTITUTE OF BUSINESS

1. Advertise for the position of Director of IOB by the spring of 1990. Until the position is filled, the project manager should serve as interim director.

2. Establish a committee of FSS staff to develop options to attract faculty to participate in IOB's consultancy service.

3. Form research or consultancy teams with a junior staff member and a senior staff member or a local consultant. This sort of pairing will make the team more credible and provide opportunities for the junior staff person to develop skills through association with more experienced individuals.

4. Opportunities should be given to all staff of the Faculty of Social Sciences for research and consultancies. Funds should be made available for research in all areas of FSS.

5. The private sector must regularly be informed of the potential services of IOB. The Vice Chancellor and Board of Directors should host a reception to inaugurate IOB, inviting members of the Faculty of Social Sciences, leaders in the business community, USAID and other international donor agencies. This should be followed by a quarterly newsletter with information about current research, staff introductions (this should build the private sector's confidence in their capabilities), acknowledgements of assistance given, requests for human and financial resources to further assist IOB and DOMS, and information about the EMBA and EMDP.

D. COMPUTER FACILITIES

1. Conduct short staff seminars (about one hour each) on use of individual software packages. The purpose of these will be to give staff an overview of the potential application of available software for their teaching, research, and writing.

2. In addition to the full-time lab manager, hire part-time student lab assistants to troubleshoot problems and answer questions for users.

3. Make the computer room available on occasional weekends and in evenings for EMBA and part-time students.

4. Include as part of the curriculum review of each BSc course, an analysis of how computers can be used in the course.

E. LIBRARY AND INFORMATION RESOURCES

1. In an effort to build relations with the private sector, a special effort should be made to provide non-students with access to the library.

2. Designate a reading room for management studies within the current library facility. This area could also house the collection of management studies resources and would be available to the general public. We recommend that the private sector provide funds for this. Any follow on phase may consider expanding the physical facilities to accommodate a management library. In the meantime, the library should be cleared of out-of-date books to make way for the new books.

F. CONSTRUCTION AND REFURBISHING

1. Give greater attention to procurement of audio-visual equipment. Overhead projector screens should be installed before commencement of the EMBA. All staff should be trained on use of audio-visuals as part of their lectures.

CONTRACTOR PERFORMANCE

1. With the arrival of a new resident advisor, expectations and roles should be clarified with respect to:

- * counselling new staff member in developing research interest and skills
- * developing a mechanism for routine follow-up (i.e., initiating an IOB newsletter)
- * teaching at least one course per term
- * developing personal and institutional relationships with the business community

2. The remainder of Phase I should focus on PSU meeting their contractual agreements in the following areas:

- * BSc program review
- * integration of computers into BSc
- * communication/instructional aids
- * teaching in EMBA
- * planning and external relations
- * establishment of a library data base

3. Monitor performance of the contractor closely to ensure that there is significant improved performance by January 1990 in areas for which achievement of their obligation is currently lagging. If their performance has not improved significantly, consider reopening the bidding for a university or group of universities (preferably an existing consortium) for Phase II. Priority should be given to universities with interests in the Caribbean.

4. Before the end of Phase II, consider the need for a long-term contract with any U.S. university for Phase III. If it is determined that UWI cannot provide adequate staffing, consideration should be given to greater use of the Fulbright Scholar program, the International Executive Service Corps, Personal Services Contracts, or short-term contracts with U.S. universities.

UNIVERSITY SUPPORT

1. The new resident advisor should make an effort to be more integrated in DOMS and be required to teach at least one course in DOMS.
2. The project manager, resident advisor, and DOMS Head should seek to develop more contact with the FSS through joint seminars, joint research activities and lectures to the EMBA.
3. Earmark project funds for curriculum development and joint research activities between the DOMS and members of other FSS departments, particularly the Department of Economics.
4. Incorporate the staff of Public Administration within a School of Management Studies.

INTERACTION WITH THE BUSINESS COMMUNITY

Publish a quarterly newsletter with information about current research, staff introductions (this should build the private sector's confidence in their capabilities), acknowledgements of assistance given, requests for human and financial resources to further assist IOB and DOMS, and information about the EMBA and EMDP.

INTERFACE WITH MANAGEMENT TRAINING INSTITUTIONS

1. Efforts should be made to facilitate the accreditation of courses from related management institutions. The curricula of these programs should be scrutinized to determine which courses if any merit acceptance by the university. Advice should be provided to the training institutions regarding how they might improve their offerings to gain accreditation.
2. Further structured meetings should be held with training institution representatives to promote greater collaboration and coordination of activities.
3. Efforts should be made to recruit a contingent of public sector managers for future EMBA classes.

IV. RECOMMENDED OBJECTIVES AND PROGRAM ACTIVITIES FOR PHASE II

The goal of the project--to overcome the shortage of trained mid- and upper-level managers--continues to be important, given lasting shortages of skilled managers and the increasing demand for management studies programs. The purposes and anticipated outputs should, therefore, remain constant in a possible second phase.

Throughout this report are a number of recommendations for Phase II. It is too early, however, to provide specific recommendations on all components for a second phase. At this point, we have only attempted to outline basic parameters of Phase II.

We recommend that the final evaluation be conducted as planned in May 1990, or earlier if deemed necessary. The scope of work for the evaluation should include the issues that are important for making a decision about whether there should be a Phase II, and if so, what the nature of the follow-on should be.

1. STAFF DEVELOPMENT

Between three and five staff members should receive PhDs in Phase II. It is essential to have several members of the Department trained to the PhD level since it is normally at this level that one develops research skills. In view of the significance of research in this project, it will be necessary to train several staff members to this level.

It is important that future training also be in areas in which the need is greatest, e.g. human resource development, management information systems, and marketing.

It may also be advisable to encourage faculty to undertake training at diverse institutions so that a range of perspectives are gained.

2. PROGRAM DEVELOPMENT

BSc. Work on strengthening the BSc in conjunction with the shift toward the semester system. This will be an appropriate period to consider course offerings following a review of offerings at similar institutions and with input from the business community and public sector. Particular gaps or areas of weakness in the BSc curriculum include organizational development, managerial communication, international business, small business development, human resources management and industrial relations, and marketing.

Introduce new teaching methodologies which emphasize experiential activities. Introduce new teaching aides and equipment.

EMBA. Make revisions following careful review of monitoring information in final period of Phase I. If warranted, phase out extensive teaching role of contractor and substitute regional faculty and guest lecturers.

The EMBA should be fully self-financing and should be making a financial contribution to the UWI by the end of Phase II. To do this, several plans must be developed and integrated. Second, DOMS must design a staffing plan which details how each core area will be staffed and who will be responsible for coordination. Second, a DOMS must develop a curriculum plan. They have already adopted a provisional curriculum. It will be necessary, however, to review and revise the curriculum based on discussion with student, graduates and employers as well as a review of other EMBA programs. In addition, certain adjustments in the curriculum may have to be made to accommodate the availability of faculty and adjuncts to staff the EMBA. Finally, a financial plan will have to be prepared to indicate how the program costs will be allocated. If a second cohort of student will be admitted in June 1990, the plan will have to be ready by March 1990.

In regard to staffing, the mode of operation for the first cohort of courses operates with a PSU technical assistance coordinating the core areas, but the plan for DOMS management of the EMBA would instead use a UWI faculty member as a coordinator in each area. The coordinator might be responsible for teaching the course or identifying adjunct faculty whose qualifications would be reviewed by an IOB hiring committee. Most EMBA programs use a few faculty members and a large number of adjunct professors drawn from the ranks of business and government. It would be possible for UWI to staff its program locally were it to follow this approach. Faculty from other institutions could be hired as professors in areas where they are needed.

The second cohort would be transitional then involving some outside assistance. The third cohort would be fully staffed by DOMS and adjunct faculty supplement, if needed, by international lecturers.

DOMS faculty should continue to attend EMBA courses in their areas of expertise.

Executive Management Development Program. Review monitoring information to determine whether one program per year is sufficient. By the end of Phase II, the program should be entirely run by DOMS and IOB and the program should be self-supporting.

3. INSTITUTE OF BUSINESS

Continue activities begun in Phase I.

4. STRUCTURAL CHANGES

Expand the role of the Department of Economics in the project. There is an interest within DOE for working more closely with the project in management studies. A review of course syllabi indicates that the coursework is highly complementary and provides substantial coverage of conventional areas of economics theory, e.g., consumer choice, marginal pricing, Keynesian income determination. There is also an interest in joint research with DOMS as well as in closer cooperation in the management and use of the computer facility.

Establish a School of Business with a Department of Management Studies and a Department of Public Management. Any further departmental divisions would be costly in terms of administrative time and are not advisable.

A N N E X A

SCOPE OF WORK

STATEMENT OF WORK

1. Purpose of the Evaluation

This is the first external, interim evaluation of the UWI Management Education Project. It is needed to ascertain:

- i) the extent to which project inputs and outputs have been provided in a timely manner and the relationship of both inputs and outputs to the achievement of the Project's purpose for the first phase of what has been conceived, in the Project Paper, as a likely three phase, ten year effort;
- ii) the extent to which project activities have been developed in a manner that has or will likely increase the involvement of the business community in developing new and/or revised course offerings at the BSc and MBA levels, teaching and research;
- iii) the extent to which project activities within the UWI have gone forward in a manner that enhances the likelihood of active involvement of other parts of the university (e.g., Department of Economics) in developing and carrying out the Project's activities; and
- iv) the extent to which project assumptions continued to be valid.

The evaluation will be undertaken cooperatively, involving the active participation of individuals from the UWI, including the Department of Management Studies (DOMS), the business community and USAID Jamaica. Results will be used by cooperating members to improve and focus project activities during the remainder of Phase I and to provide the basis for outlining the likely parameters of Phase II which must be developed during the remainder of Phase I. Findings and recommendations produced by the contractor will be submitted to relevant participants in the project who, in turn, will provide written comments to the contractor for inclusion in the final report which will then be used as the basis for revisions to project inputs and the development, by DOMS/UWI, of a revised Project implementation plan with accompanying revised Project budget.

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2. Background of the Project

Based on several studies conducted by USAID/Jamaica during the 1981-1986 period it was concluded that there is a shortage of skilled managerial manpower and consequently ineffective performance levels at the mid to upper levels of both private and public sector institutions. A lack of adequately trained managers has been consistently identified as a constraint to a private sector-led sustained growth of the Jamaican economy. This constraint is viewed as pervasive in both private and public organizations where modern professional technical and managerial skills are conspicuously lacking. The Project was developed to help the UWI play a more effective role in meeting the aforementioned shortage.

The Project was designed by UWI under the collaborative assistance mode with Pennsylvania State University's College of Business Administration and the assistance of USAID/Jamaica. The long term nature of this institutional development undertaking envisions an effort over approximately a ten year period, to be implemented in three phases. Phase I is to be implemented over the three-year period September 1987 to September 1990.

Phase I consists of three components: (a) staff development, which entails upgrading the capabilities of the DOMS staff to deliver management education programs which address the needs of the Jamaican business community; (b) program development, which entails the establishment of new and improved courses at the BSc level, the introduction of a new Executive MBA program and a new Executive Development Program; and (c) the introduction of new organizational structures including new units in the DOMS (Management Information Systems & Accounting, Business Economics, Marketing, General Management & Human Resources, Operations Management, and Business Law), and the establishment of an Institute of Business.

Accomplishment of the objectives of each of the three components is expected to result in (a) the strengthening of the capability of the DOMS to develop and deliver self-sustaining and appropriate management education programs of high quality; (b) the provision of methods and mechanisms for retaining staff of high quality; and (c) an increase in the interaction and collaboration between the DOMS and the Jamaican business community and other institutions providing management training.

The University successfully launched the EMBA program, to commence July of 1989. The DOMS obtained all UWI academic approvals for establishment of the Institute of Business (IOB), and the Institute held its inaugural meeting on January 20, 1989. The newly constructed extension of the DOMS building was completed.

There are, however, delays. The first was caused by Hurricane Gilbert which delayed the opening of the University until the first week of November, 1988. This meant that faculty members' time had to be diverted towards restoration activities, thereby cancelling or postponing some of the planned activities under the Project. The second event was the General Election. The Election was held on February 9, 1989, but for several months before, the attention of many faculty was diverted and, consequently, certain meetings and schedules were postponed. In short, the period September 1988 to January 1989 witnessed understandable slowdown.

Notwithstanding the above, the Project continued to focus on its goals, and in many respects is on target. More specifically, the University, under the leadership of the new Vice Chancellor, continued and expanded its program for collaboration (including financial assistance) and cooperation with the business community, with a view to establishing closer relations with the private sector and the community at large.

The remaining months of the Project (Phase I) must give renewed attention to: upgrading the Bsc. program; commencing research; running the new EMBA and beginning start-up activities in the IOB.

3. Scope of Work

The contractor will assess:

i) the extent to which the Project's planned inputs and outputs (as given in the Project Logical Framework Matrix attached hereto as Annex III) have been achieved and the extent to which they are contributing to the timely attainment of the Project's purpose.

- The Contractor will describe inputs and outputs in terms of their size, quality and conformity to the Project's implementation schedule.

- equal attention should be given to assessing Project inputs and outputs;
- ii) the extent to which the Project's assumptions (as stated in the Log Frame) continue to be valid.
 - To the extent to which any assumption proves not to be valid, the Contractor will provide explanation of why it is no longer valid, what the implications are for achieving output/purpose targets, recommendations for revising the assumption and a detailed explanation of the basis for the new assumption;
- iii) the extent to which Pennsylvania State University is meeting its contractual obligations to UWI in a timely and substantive manner.
 - The Contractor will provide a written assessment of how responsive the contractor has been to Project (UWI/DOMS) requirements to include a review of the number, quality and timing of contractor inputs. Where shortfalls have occurred, we will expect to see an explanation of why quality and/or quantity expectations have not been met;
- iv) the extent to which Project activities are attracting support from faculty in other parts of the UWI: i.e., from staff not directly involved in the DOMS program.
 - The Contractor will provide a written assessment of the extent to which members of the Social Sciences Faculty (e.g., Economics Department) are being involved in DOMS activities: e.g., in helping to design or modify management education courses; in modifying courses in the Department of Economics to help meet DOMS objectives; in teaching courses related to DOMS requirements; and research;
- v) the extent to which individuals from the Jamaican business community are involved in DOMS activities.
 - The Contractor will assess the nature and frequency of interaction between DOMS staff and the business community, as such interaction relates to DOMS' efforts to meet the needs of the business community through courses, seminars, research, etc.;

- vi) the extent to which the DOMS program is interfacing with institutions in Jamaica which are providing management training (e.g., Jamaican Institute of Management, Institute of Management and Production).
 - The Contractor will assess the nature and frequency of interaction between the DOMS program and such institutions with particular attention being given to DOMS efforts to accommodate the needs of such institutions, within the limits of the Project (e.g., training staff from such institutions, developing case studies which could be used by such institutions);
- vii) the extent to which the development of the DOMS program takes into account the regional nature of the UWI.
 - The Contractor will carry out an assessment which details the extent to which regionalism has been considered by DOMS in developing its several programs to include consideration of the extent to which the regional nature of UWI is a positive or negative factor in carrying out the purposes of the Project.
- viii) For each of the aforementioned sections (i - vii), the contractor will provide:
 - a. written conclusions based on empirical findings;
 - b. recommendations for steps to be taken by USAID and/or UWI to rectify any shortcomings identified in the current phase; and
 - c. recommended objectives and program activities for Phase II.

5. Methods and Procedures

The Contractor will collect data from project files, the contractor (Penn State) and DOMS/UWI records. For answering questions iii - vii, the contractor will conduct "targeted" interviews with key individuals identified primarily by USAID and DOMS staff. The contractor may also utilize the results of recent surveys of the business community completed by the Mission's Private Enterprise Division. Within two days of arrival in country, the Contractor will specify how the contractor will conduct interviews, type of instrument, if any, to be used in ordering responses and how responses will be ordered.

5. Reporting Requirements

The contractor is required to provide oral and written reports as per the suggested work schedule below.

The required format for the written evaluation report is as follows:

- Executive Summary (see outline in Annex III)
- Table of Contents
- Body of the Report
- Appendices

1. Contractor reads project documents, meets with key UWI/USAID staff and prepares an outline of how the evaluation will be carried out. /1
2. Interviews executed and input/output/ assumption analysis completed.
3. Write up of draft final report.
4. Draft final report presented to US"ID and UWI.
5. Contractor departs.
6. UWI and USAID provide contractor with written comments on draft evaluation report within two weeks.
7. Contractor incorporates USAID and UWI comments in evaluation report and submits final report to USAID/UWI within two weeks of the receipt of written comments referred to in (6) above.

1/ Outline will be reviewed by USAID and UWI in two days.

The executive summary states the development objectives of the activity evaluated; purpose of the evaluation; study method; findings, conclusions, and recommendations; and lessons learned about the design and implementation of this type of development activity.

The body of the report should include discussion of (1) the purpose and study questions of the evaluation; (2) the economic, political, and social context of the project; (3) team composition and study methods (one page maximum); (4) evidence/findings of the study concerning the evaluation questions; (5) conclusions drawn from the findings, stated in succinct language; and (6) recommendations based on the study findings and conclusions, stated as actions to be taken to improve project performance. The Body of the Report should be approximately 40 pages with more detailed discussions of methodological or technical issues placed in appendices.

Appendices should include a copy of the evaluation scope of work, the Logical Framework Matrix as revised, a list of documents consulted, and individuals and agencies contacted. Additional appendices may include a brief discussion of study methodology and technical topics if necessary.

A N N E X B

LOGICAL FRAMEWORK

PROJECT DESIGN SUMMARY:LOGICAL FRAMEWORK MATRIX

NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
GOAL: Overcome shortage of trained managers in Jamaica	1. Number of persons graduating from expanded DOMS: (i) BSc: 20% increase over total number of certificate graduates for the 3-year period diploma 1983/84 to 1985/86. (ii) EDP: 120 persons 2. Number of persons enrolled in EMBA: 60	Department of Management Studies Annual Reports Project Evaluation Reports	Trend for increased demand for management studies courses will continue
PURPOSE: Strengthen management education and training capability of UWI Department of Management Studies	1. Increase in average academic depth index in DOMS from 4.24 to 5 (See Hall Report p. 42) 2. Improved and expanded program offerings: (a) Expanded and upgraded BSc. program (b) New EMBA program (c) New Executive Development Program	UWI Calendar, Faculty of Social Sciences Regulation & Syllabi. Project Evaluation Reports	New staff employees will be at lecturer's level by end of Phase I. All approved staff positions filled Two existing staff members will advance to senior lecturer level
OUTPUTS: Quantifiable Outputs: 1. Staff Development DOMS faculty with upgraded teaching and research skills	(Annual totals are cumulative) New Staff 4 7 9 Existing Staff 6 9 10	UWI Calendar, DOMS Reports	Two new staff positions will be approved for DOMS. Staffing will include consideration of attrition.

RRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
<u>Program Development</u>			
a) BSc: New and upgraded course offerings	New BSc. Courses 4 Upgraded 5	8 10 11 15	"
c) Executive MBA	New EMBA Modules 6	11 15	"
c) Executive Development Program series	EDP Seminars 2	4 6	"
<u>Research & Development</u>			
Cases developed and research projects conducted	Cases - Research Projects -	2 3 4 6	"
Computer Facilities	Computer facilities with hardware and software used for teaching, research and administration		
Library Facilities	Stock of journals, textbooks, periodicals and A-V materials for DONS staff and students.		
New Organizational Structure Institute of Business	Board of Management for Institute of Business	UWI Calendar	Institute of Business will be approved by Finance and General Purposes Committee of UWI.
Upgraded DONS Building	DONS Building with additional space for classroom and offices	DONS Building	
<u>Non-quantifiable Outputs</u>			
Closer collaboration between DONS and business sector.			
Closer collaboration between DONS and other major institutions providing management training, eg. CAST, IMP, JIM			

NARRATIVE SUMMARY**OBJECTIVELY VERIFIABLE INDICATOR****MEANS OF VERIFICATION****IMPORTANT ASSUMPTIONS****INPUTS**

USAID financed:

Technical Assistance Training:
Local at UWI at
Overseas at PSU

See - Cost Estimates and
Financial Plan

Project Financial Records

Inputs available in a timely
fashion**Commodities**

Computer equipment -
software and furniture

Library information re-
sources & A-V material

Construction of two seminar
rooms, a computer room, five
staff offices and renovation
of lecture theatre and other
facilities

Business Sector - technical assistance

UWI: faculty salaries, offices,
furniture, equipment, utilities,
maintenance, administrative
support

A N N E X C

SCHEDULED PROJECT ACTIVITIES
AND ACCOMPLISHMENTS

Annex C

SCHEDULED PROJECT ACTIVITIES AND ACCOMPLISHMENTS

PROJECT ACTIVITIES	PROJECT ACCOMPLISHMENTS
Selection and training of MA candidates	<p>3 trained and appointed</p> <p>3 will complete training September 1989</p> <p>3 scheduled to begin training September 1989</p>
Conduct an evaluation of existing BSc	Not accomplished; review postponed
Investigate possibilities of EMBA	EMBA developed and ready to begin July 31, 1989
Institute Executive Management Development Program	2 EMDP sessions held; one in planning
Construct addition to building	Completed and being utilized
Establish Institute of Business	IOB approved; meeting held to plan activities for 1989/90
Develop a faculty research program	Not accomplished
Work with Penn State returnees to develop individual research projects	Not accomplished
Coordinate visits of PSU technical assistants	Visits of 8 technical assistants to UWI coordinated
Develop strategic plan for DOMS	Discussions began in August 1988
Coordinate visits by UWI staff to PSU	Visits by 9 UWI staff members coordinated

A N N E X D

MATRIX OF FINDINGS,
CONCLUSIONS
AND
RECOMMENDATIONS

Annex D
 MATRIX OF FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

CATEGORY/AREA OF CONCERN	FINDINGS	CONCLUSIONS	RECOMMENDATIONS
1. INPUTS & OUTPUTS			
A. STAFF DEVELOPMENT			
Training for Existing Staff	2 attended short-term training, 8 went for consultations at PSU; faculty development seminars	evidence of efforts to ensure staff development thru training; dearth of lecturers with doctoral degrees	Phase II should include opportunities for selected professors to complete PhD training in the U.S.
Compensation	inadequate compensation	constraint to recruitment and selection of staff; little incentive to spend time in training	solicit financial support thru IOB from business community; promote contracted research; develop consulting skills
Training for New Staff	3 received MS degrees; 6 others to follow for MS degrees; returned trainees do not feel prepared to take on full teaching load	9 staff would have received MS degrees from PSU by 1990; department is bottom heavy (with 10 new junior faculty members)	DOMS should continually evaluate gaps between faculty expertise and curriculum deficiencies; recruit appropriate people to fill gaps; and develop strategy to fully assimilate new staff into Department
	DOMS faculty re-evaluate staffing needs of Department	significant gaps in certain areas of concentration	develop strategy to fully assimilate new staff into Department
Visiting Faculty Appointments	8 PSU professors visited; institutions and public/private sector groups asked to collaborate on visiting lecturers and factory tours	DOMS counterpart staff enriched by workshops, papers and lectures by PSU; gained visiting lecturer and access to factories	make more systematic use of Fulbright scholars, Harvard Business School alumni and local resources
Part-time Staff	nothing yet has been done in terms of giving them greater recognition	considerable portion of Management Studies program taught by part-timers	discuss issue of greater recognition in future committee meeting

CATEGORY/AREA OF CONCERN	FINDINGS	CONCLUSIONS	RECOMMENDATIONS
Executive Management Development Program	<p>2 seminars completed and ongoing preparation for 1989 seminar</p> <p>substitute presenter for second seminar not well-prepared in terms of Jamaican context and presentation style</p> <p>although there is demand, there is also great supply of executive seminars</p> <p>cost of 1988 seminar is subsidized by project</p> <p>participation has been heavily skewed to large businesses, although it was not intentional on the part of project staff</p>	<p>much of responsibility for seminars rests with DOMS staff</p> <p>relevancy is a critical concern</p> <p>number of planned seminars has been cut down to one per year</p> <p>seminars should be self-supported by end of Phase II</p> <p>either seminar topics are not relevant to small/medium-sized businesses or not affordable</p>	<p>continue to involve DOMS staff in design, delivery & evaluation of seminars until managed completely by DOMS staff</p> <p>select only outstanding presenters or those familiar with Caribbean business environment</p> <p>continue to limit to one per year thru Phases I & II; look at quality and demand of other seminars</p> <p>seminar fees should be increased until full economic cost is charged to participants</p> <p>determine if project intent is also to reach small/medium-sized businesses.</p>
Certificate and Diploma Program	<p>issues under debate are:</p> <p>1) should Diploma program be harmonized with EMBA; 2) should UWI divest the Certificate programs to other specialized institutions and simply perform monitoring and accreditation</p>	<p>issues have not yet been resolved, thus rationalization of programs has not yet been done</p>	<p>UWI, JIM, IMP should meet to resolve issues</p>
Research Program	<p>2 case study writing workshops were held; 3rd workshop will instruct faculty how to teach with cases; 6 new cases have been developed</p>	<p>case study component has received more attention than new research projects</p>	<p>make cases available and encourage faculty to use these in BSc and EMBA; make funds available to encourage development of cases, instructional materials and data bases</p>

CATEGORY/AREA OF CONCERN	FINDINGS	CONCLUSIONS	RECOMMENDATIONS
	3 research proposals have been submitted for approval partly due to earnings issue, DOMS staff have had to engage in outside consultancies and training; research activities are not compensated equipment, software and funds given by project to Carribean Finance and Management, a DOMS journal private sector research needs currently being met by PSOJ or in-house researchers; PSOJ is willing to collaborate with IOB on researches firms expressed willingness to open their books to researchers; one condition is that they, in turn, benefit from the research most firms interviewed willing to host an intern	attitudinal & logistical problems exist that prevent progress on research activities for senior faculty little time and incentive to participate in research DOMS has facility to disseminate research findings and ideas thru CFM journal some unmet research needs in private sector that IOB may satisfy this points to the need for both relevancy and follow-up in research remains a feasible objective	assign newly trained staff to assist with teaching, tutorials and marking IOB should place research at top of its agenda; search for contracts and funds to pay faculty for research attempt to increase distribution of journal arrange access to PSOJ data bases and provide financial assistance to strengthen it provide completed research projects to participating firms design a thorough program (consider successful programs abroad)
Internship Program C. INSTITUTE OF BUSINESS IOB Director	IOB has been approved and fully accepted by UWI; many IOB activities currently being managed by project staff	evident need for a Director to consolidate work in IOB	advertise for the position of Director by the Spring of 1990
Consultancies	senior faculty are busy teaching and doing consulting on their own	must develop incentives to attract faculty to IOB	develop options to attract faculty to participate in IOB's consultancy services

CATEGORY/AREA OF CONCERN	FINDINGS	CONCLUSIONS	RECOMMENDATIONS
F. CONSTRUCTION AND REFURBISHING	new building complete; renovations on existing structure	facilities need to be maintained and fully utilized; only a few procurements outstanding	procure audio-visual equipment; overhead screens need to be installed before EMBA starts
2. CONTRACTOR PERFORMANCE:	Dr. Heitmann assumed position in March 1988; rocky start	relationship with DOMS may improve as he gets more involved;	clarify expectations and roles re: developing personal & institutional relationships with the business community
	there were 11 completed visits by PSU staff (providing short-term technical assistance); several produced timely & relevant workshops and reports	PSU provided timely and substantive technical assistance in some but not all areas required	PSU should focus on contractual agreements in following areas for rest of Phase I: BSc program review, integration of computers in BSc, communication/instructional aids, teaching EMBA, planning & external relations, and establishment of library data base
	PSU contributions to project have been lacking in a number of areas	unclear at this point whether UWI and USAID have received adequate services for their payments;	monitor performance of contractor thru December 1989; if this has not improved significantly, consider reopening bidding for Phase II
	number of successful Jamaican businessmen have expressed interest in and availability to assist	there are sufficient local resources to maintain the quality of the project	before end of Phase II, consider need for long-term contract for Phase III; if UWI cannot provide adequate staffing, consider other options

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CATEGORY/AREA OF CONCERN	FINDINGS	CONCLUSIONS	RECOMMENDATIONS
3. UNIVERSITY COMMITMENT, SUPPORT AND ACTIONS	<p>there is issue of commitment: 8 of 13 full-time DOMS staff have had more than marginal involvement in the project</p> <p>thin and sporadic support for project; but interest among faculty members</p> <p>research projects have been proposed to build on research skills of FSS department members</p> <p>DOMS has few faculty above lecturer level; excessive number of students per faculty</p>	<p>many staff do not feel identification with project or see link between DOMS and project</p> <p>project manager, advisor and DOMS head should develop more contact with FSS</p> <p>there is interest in cross-dept collaboration in research and curriculum development</p> <p>DOMS could benefit from association with staff of Public Administration</p>	<p>new resident advisor be more integrated in DOMS and should teach at least one course</p> <p>conduct joint seminars & research activities; invite FSS staff to lecture on EMBA</p> <p>earmark project funds for curriculum devt and joint research activities between DOMS and other FSS dept members</p> <p>incorporate the staff of Public Administration within a School of Management Studies</p>
4. INTERACTION WITH BUSINESS COMMUNITY	<p>frequent and deliberate communication between the project staff and private sector; groups appear to be providing valuable input to project; BSc Management program well-regarded; input specially strong in EMDP; significant in EMBA program; IOB is also supported</p>	<p>significant data demonstrate that project has consulted private sector on project development; efforts to seek input from private sector seen in initial stages of design and continue thru implementation and monitoring; major potential weakness is lack of</p>	<p>publish quarterly newsletter with info about current research, staff introductions, acknowledgements of assistance given, requests for human and financial resources to assist IOB and DOMS, and info about the EMBA and EMDP</p>

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CATEGORY/AREA OF CONCERN	FINDINGS	CONCLUSIONS	RECOMMENDATIONS
5. INTERFACE WITH MANAGEMENT TRAINING INSTITUTIONS	<p>there is regular & extensive contact with IMP as opposed to scant contact with JIM; institutions requested assistance in providing guidelines for accreditation, faculty & curriculum development; also requested structured meetings</p> <p>contact with Administrative Staff College has been sparse; acting director interested in sending senior civil servants to attend EMBA</p>	<p>contact between project and training institutions has been worthwhile but somewhat limited</p> <p>there is interest in project in view of new directions in training civil servants, convenience and economic cost, and joint training of public and private sector</p>	<p>facilitate accreditation of courses from related management institutions; further structured meetings with training institution representatives to promote greater collaboration and cooperation</p> <p>recruit contingent of public sector managers for future EMBA classes</p>

docuname: matrix.wku

A N N E X E
LIST OF DOCUMENTS CONSULTED

ANNEX E

LIST OF DOCUMENTS CONSULTED

From the University

Department of Economics Course Syllabi
DOMS Course Syllabi
DOMS Personnel Files
DOMS Research Plan (draft), September 1988
UWI Departmental FTEs and S/S Ratios, Mona, 1988/89
UWI Faculty of Social Sciences Regulations
and Syllabuses, 1987/88
UWI Official Statistics, 1987/88

From Project Files

Contract Between USAID and Penn State University
Implementation Plan
Private Sector File
Quarterly Reports
Resident Advisor's Reports
Training Plan

From USAID/Kingston

Project Agreement, September 11, 1987
Project Paper, AID/LAC/P-393
Semi-Annual Review, October 1988 - March 1989

Other

"Assessment of the Jamaican Small Business Environment,"
Trevor Hamilton and Associates, March 1989

"Demand/Needs Assessment," Marshall Hall, April 1986

"Future Directions of Management Education in the
Caribbean," Neville Ying, Project Manager,
UWI/USAID Management Education Project, March 1989

"Future of Management Education at the U.W.I.," (Prepared
for Discussion at a Cross Campus Consultation on
the Future of Management Education at U.W.I.),
DOMS/Cave Hill, March 1989

"Institutional Review of UWI," Jan J. Loubser, Ronald
Hughes, Zaffar Ali, and Compton Bourne, CIDA,
February 1988

"Jamaica's Financial Market: The Way Forward." PSOJ,
January 1989

Review of Management Education and Training Projects
in the English-speaking Caribbean and Some Options
for Future Project Development (draft), Dave Evans,
AID/LAC/DR, May 9, 1989

The Jamaican Exporter, Official Yearbook and Membership
Directory, 1988-1989, Jamaican Exporters'
Association

A N N E X F

LIST OF INDIVIDUALS INTERVIEWED

ANNEX F

Individuals Interviewed

From USAID:

Dr. William Charleson, Director, Office of Education and Human Resources
Mr. Walter Coles, Director, Private Sector Office
Ms. Rebecca Cohn, Director, Office of Health and Nutrition
Ms. Patricia J. Lerner, Project Development Officer, Office of Project Development and Support
Ms. Nola Mignott, Project Officer, Office of Education and Human Resources
Mr. Lloyd A. Prince, Private Sector Office

From the University of the West Indies:

Prof. R. Augier, Pro Vice Chancellor, Staff Affairs
Ms. Rosemarie Clarke, Assistant Lecturer, Department of Management Studies
Mr. Rene Daley, Director/Senior Assistant Registrar, Office of Placement and Career Services
Mr. Earle Gibson, Lecturer, Department of Management Studies
Mr. Audley Harris, Assistant Lecturer, Department of Management Studies
Mrs. Jefferson, Library Director, Mona Campus
Dr. Edwin S. Jones, Reader and Dean, Faculty of Social Sciences
Mr. Claremont Kirton, Lecturer, Department of Economics
Mr. Locksley Lindo, Head, Department of Management Studies
Mrs. Margaret Mendes, Lecturer, Department of Management Studies
Mr. Diaram Ramjeesingh, Lecturer, Department of Management Studies
Prof. Leslie Robinson, Pro Vice Chancellor, Planning
Mr. Uriel Salmon, Lecturer, Department of Management Studies
Mr. Michael Williams, Lecturer, Department of Management Studies

From the Project Staff:

Dr. George Heitmann, Resident Advisor, Pennsylvania State University
Dr. Neville Ying, Project Manager

From Management Training Institutions:

Ms. Sadie Fraser, Acting Director, Administrative Staff College
Mr. Samuel Smith, Executive Director, Jamaica Institute of Management
Dr. Elsa Leo-Rhynie, Acting Director, Institute of Management and Production

From the Jamaica Business Community:

- Mr. Maurice L. Clarke, Senior General Manager, National Commercial Bank JA. Ltd.
- Mr. Oliver Clarke, Chairman of the Board of Directors, The Gleaner Company
- Mr. Clive S.A. Edwards, Jr., Managing Director, George & Branday Ltd.
- Mr. D.R. (Doug) Folkes, Managing Director, Mutual Security Bank Limited
- Dr. Marshall Hall, Managing Director, Jamaica Banana Producers Association
- Mr. Rex H. James, Deputy Managing Director, National Commercial Bank JA. Ltd.
- Ms. Gloria Knight, Managing Director, Mutual Life
- Dr. Noel Lyons, Managing Director, National Development Bank
- Mr. Donald McIntosh, Managing Director, McIntosh Furniture Company, Ltd.
- Mr. Joseph M. Matalon, Vice-President (Finance), Industrial Commercial Developments Limited
- Dr. Nathan Richards, Chairman of the Board, National Development Bank
- Mr. B.C. Wright, Personnel Manager, Nestle Jamaica
- Dr. Paul Chen-Young, Managing Director, Eagle Merchant Bank

From the Public Sector:

- Ms. Sylvia Goldson, Manpower Division, Planning Institute of Jamaica
- Dr. Mark Maitland, Manpower Division, Planning Institute of Jamaica
- Mr. Woodstock, Assistant General Manager, Urban Development Corporation

Associations:

- Ms. Marcia Bennett, Jamaica Exporter's Association
- Ms. Polly Brown Vice President, JAMPRO
- Dr. Gary Filerman, President, Association of University Programs in Health Administration
- Mr. Delroy F. Lindsay, Executive Director, Private Sector Organization of Jamaica
- Mrs. Camille Needham, General Manager, Jamaica Hotel and Tourist Association
- Mr. Trevor Riley, Manager, Public Relations, JAMPRO
- Mr. Louis Stephenson, Small Business Association of Jamaica

A N N E X G
L E T T E R O F I N T R O D U C T I O N

UWI Management Education Project

The Pragma Corporation has been contracted by USAID to conduct a mid-term evaluation of the Management Education Project. The project is being implemented collaboratively by the University of the West Indies and Pennsylvania State University.

The project is expected to (1) strengthen the capability of UWI's Department of Management Studies (DOMS) to develop and deliver self-sustaining and appropriate management education programmes; (2) provide mechanisms to retain high-quality staff; and (3) increase the interaction between UWI/DOMS and the Jamaican business community and other institutions providing management training. It is intended to help overcome the shortage of trained middle and upper managers in the public and private sectors of Jamaica.

Phase I (1987-1990) consists of three components: (1) development of UWI/DOMS staff; (2) development of the BSc, an Executive Management Development Programme, and an Executive MBA; and (3) establishment of an Institute of Business. USAID funding is providing UWI with technical assistance from Penn State, training, computers, library materials, and a new building at the Mona Campus. This will complement UWI's in-kind contribution of staff and management time, and office space.

Dr. Neville Ying is the Project Manager and Dr. George Heitmann is the Resident Advisor from Penn State. USAID Project Officers are Ms. Nola Mignott and Dr. William Charleson. Pragma evaluators for the project are Dr. Robert Girling and Ms. Melanie Sanders.

A N N E X H
INTERVIEW GUIDES

INTERVIEW GUIDE
BUSINESS COMMUNITY

A. Awareness/Involvement

1. Are you aware of the UWI project to strengthen DOMS?
What do you know about it?

2. Have you or anyone on your staff participated in the project? (executive seminars, case studies, lecturers)
Would you like to be involved?

B. Perceptions

1. What is your general feeling about the project?

Is it affected by the involvement of Penn State?

Do you expect it to make a difference in the quality of managers in Jamaica?

2. How would you compare the training received at UWI with that of JIM, IMP, or CAST?
3. Do you regularly hire graduates from UWI? from DOMS?
 - a. If yes, do you think they are well prepared?
 - b. If no, why not?
4. What is your sense about the reputation of DOMS in the business community?

What are the current strengths and problems of DOMS?

C. Recommendations

1. What could DOMS do to strengthen their image in the business community?
2. What are your current research needs? Do you see a role for DOMS? (Specify research needs.)
3. Would you be interested in hosting a DOMS intern for a summer, term, or longer?
4. What must the project do to really improve the quality of managers in Jamaica?

General Evaluation Questions for the University

1. How does decision-making within the University facilitate the achievement of Project objectives?
2. Is the Project being utilized by UWI to experiment with new structures, programmes and services?
3. How would you assess the level of support and commitment for the Project within UWI?
4. Are the objectives of the Project for staff development consistent with UWI's development programme for staff in the DOMS?
5. What are the strategies being utilized by UWI to ensure that members of staff and the DOMS derive maximum benefits from the staff development component of the Project?
6. To what extent are the new programmes and services under the Project enabling the University to better serve the business sector?
7. What strategies are being utilized by UWI to ensure that the DOMS increase/improve collaboration with the business community in the planning and implementation of its management development programmes and services?
8. Within the above, to what extent have efforts been made to enhance the regional interest of UWI and to take into account the management education/training efforts of others in the region, particularly Cave Hill, Barbados.

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A N N E X I

DOMS STAFF ASSIGNMENTS

DEPARTMENT OF MANAGEMENT STUDIES
TEACHING ASSIGNMENTS 1989/90

The following represents what we know at this time about the teaching assignments for next year. I would like you to consider these and make any suggestions, alterations, deletions and additions, bringing to my attention any cases of doubt, or any instances where a change for the better may be made. Staff members should feel free to volunteer for additional assignments.

DEGREE PROGRAMME

	Day	Evening
MS 106 Accounting I	Mr. Salmon	Miss Byfield*
MS 226 Organizational Theory and Behavior	Mr. Lindo Miss Crick	Mr. Lindo
MS 227 Business Economics	Mr. Ramjeesingh	Miss Gilbert*
MS 228 Marketing	Mr. Gibson Mr. Johnson	Mr. Gibson
MS 229 Accounting II	Mr. Williams Miss Clarke	Miss Clarke
MS 350 Project Analysis	Miss Shirley* Mrs. Robinson	
MS 360 Cost and Management Accounting	Mr. Salmon Miss Clarke	
MS 386 Data Processing and S.A.	Mr. Harris	
MS 387 Commercial Law	Hon. A.B. Edwards* Mr. Mangal*	Mr. Mangal Hon. Edwards
MS 388 P.M. & I.R.	Mr. Cowell* Mr. Roberts* Miss Crick	
MS 389 Accounting III	Mr. Hardy Henry	Dr. Lawrence*
MS 390 Production and Oper. Mgmt.	Mr. Haughton	Mr. Felix
MS 391 Business and Economic Policy	Dr. Keating**	Mr. Gibson

* part-time staff

** Fullbright

	DAY	EVENING
MS 37A Company Law	Mr. Foote*	
MS 38A Taxation	Prof. Williams	
MS 39A Auditing	Mr. Hardy Henry	

DIPLOMA PROGRAMME

MS 525 Carribean Business Environment		Mr. Brown
MS 526 Org. Theory and Behavior		Miss Crick
MS 527 Econ. and Quant. Aids		Dr. Small
MS 529 Management Accounting and Financial Analysis		Vacant
MS 530M Marketing		Mr. Spike
MS 530P Production Management		Dr. Small
MS 531 Business Policy		Mr. Prince

CERTIFICATE PROGRAMME

MS 425 Introduction to C.B.E.		Mr. Brown
MS 426 Org. Theory and Behavior		Vacant
MS 428 Marketing Management		Mr. Spike
MS 429 Intro. to Mgmt. Acc. and Fin. Anal.		Mr. Smalling
MS 487 Commercial Law		Mr. Mangal
MS 488 P.M. & I.R.		Mr. Roberts

Lockeley Lindo
29 May 1989