

A.I.D. EVALUATION SUMMARY - PART I

64/85

1. BEFORE FILLING OUT THIS FORM, READ THE ATTACHED INSTRUCTIONS.
 2. USE LETTER QUALITY TYPE, NOT "DOT MATRIX" TYPE

IDENTIFICATION DATA

A. Reporting A.I.D. Unit: Mission or AID/W Office <u>USAID/Jordan</u> (ES# _____)	B. Was Evaluation Scheduled in Current Annual Evaluation Plan? Yes <input type="checkbox"/> Slipped <input checked="" type="checkbox"/> Ad Hoc <input type="checkbox"/> Evaluation Plan Submission Date: FY <u>89</u> Q <u>2</u>	C. Evaluation Timing Interim <input checked="" type="checkbox"/> Final <input type="checkbox"/> Ex Post <input type="checkbox"/> Other <input type="checkbox"/>
--	---	--

D. Activity or Activities Evaluated (List the following information for project(s) or program(s) evaluated; if not applicable, list title and date of the evaluation report.)

Project No.	Project /Program Title	First PROAG or Equivalent (FY)	Most Recent PACD (Mo/Yr)	Planned LOP Cost (000)	Amount Obligated to Date (000)
278-0261	Management Development	84	12/91	\$5,000	\$5,000

ACTIONS

E. Action Decisions Approved By Mission or AID/W Office Director Action(s) Required	Name of Officer Responsible for Action	Date Action to be Completed
1. Conduct feasibility study for a private graduate business school.	Dempsey/Rousseau	9/89*
2. Develop a plan with FEAS for the implementation of evaluation that includes funding support through a reallocation of existing project funds.	Rousseau/FEAS	12/89
3. Transfer responsibility for backstopping the Health Services Management Program to the Office of Health, Population, and Nutrition.	Rousseau	11/30*
4. Develop strategic plan for JIM.	Rousseau/JIM	10/89*
5. Reach agreement with the Industrial Development Bank on re-allocation of project funds to support implementation of strategic plan.	Rousseau	12/89
* Indicates action completed		

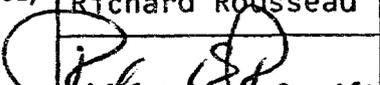
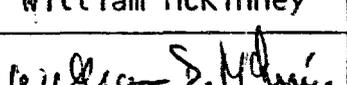
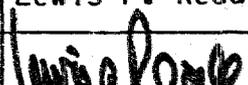
(Attach extra sheet if necessary)

Best Available Copy

APPROVALS

F. Date Of Mission Or AID/W Office Review Of Evaluation: _____ (Month) _____ (Day) _____ (Year)

G. Approvals of Evaluation Summary And Action Decisions:

	Project/Program Officer	Representative of Borrower/Grantee	Evaluation Officer	Mission or AID/W Office Director
Name (Typed)	Richard Rousseau	Dr. Abdel Rahman FEAS	William McKinney	Lewis P. Reade
Signature		Mr. Munir Zaghloul		
Date	12/20/89	JTM	12/20/89	12/20/89

ABSTRACT

H. Evaluation Abstract (Do not exceed the space provided)

The purpose of the project is to improve business management practices in Jordan through the following programs: Master in Business Administration (MBA) at the Faculty of Economics and Administrative Sciences (FFAS), University of Jordan; Master in Health Services Management Program (HSMP) at FFAS; and short term training at the Jordan Institute of Management (JIM). Most project activities are being implemented by the Institute for Resource Development (IRD). The purpose of the evaluation was to determine mid-course corrections and the need for additional resources to meet the project purpose. A four person evaluation team from Development Associates reviewed project documentation and interviewed project participants. The major findings and conclusions are:

-MBA: Although now in its sixth year, the program has only graduated 25 out of over 200 students admitted. This is due to its part-time nature, weak connections to the business community, and questions of quality. The program does not meet standards set by the American Assembly of Collegiate Schools of Business (AACSB) in the following: inadequate numbers of teaching and administrative staff; excessive teaching loads; low level of research; and lack of required courses in production management, legal environment, and policy analysis. It has been difficult for FFAS to recruit and retain qualified staff because of low salaries. As is it is unlikely that this problem will be resolved in the foreseeable future, the evaluators recommended that AID proceed with plans to support a new, private graduate business school, while continuing some funding for FFAS.

-HSMP is having a positive affect on health services management practices and enjoys wide support among the health services community. Twenty eight students have completed the program in about four years. The HSMP is not yet a viable graduate program, principally because it still relies heavily on the presence of an AID funded professor. However, one project-funded PhD will return in Fall 1989 and the other by the end of 1990. The HSMP does not meet standards in the following areas: number of permanent full-time faculty; level of research; some content areas of the curriculum; lack of departmental status; and the absence of accreditation for the host institution.

-JIM is having an impressive impact on the skills of its participants, who are mostly mid-level managers. During the period from 1985 to 1988 JIM trained 3,374 persons, well ahead of the 3,400 project target for six years. IRD has been very successful in developing the skills of JIM staff through shared delivery of courses in Jordan and training in the U.S. With the new project-funded computer center, JIM has been able to offer courses in computer skills for the first time. While the growth in demand for JIM courses has been impressive, it is still inadequate to cover operating costs. JIM needs to establish a long range strategic plan and aggressive marketing tactics that build on the positive training climate among the Jordanian business community.

-Lessons Learned: That management training institutions must be able to cover the majority of their operating costs from their clients in order to ensure that programs remain responsive to the community's needs.

C O S T S

I. Evaluation Costs

1. Evaluation Team		Contract Number OR TDY Person Days	Contract Cost OR TDY Cost (U.S. \$)	Source of Funds Project
Name	Affiliation			
Mr. William Berg	Development Associates	PDC-0085-I-6098 -00	\$64,855	
Dr. Richard Southby	George Washington University			
Dr. Donald Swanson	Development Associates			
Dr. Richard Weeks	University of Rhode Island			

Best Available Copy

2. Mission/Office Professional Staff
Person-Days (Estimate) _____ 0 _____

3. Borrower/Grantee Professional
Staff Person-Days (Estimate) _____ 0 _____

A.I.D. EVALUATION SUMMARY - PART II

SUMMARY

J. Summary of Evaluation Findings, Conclusions and Recommendations (Try not to exceed the three (3) pages provided)

Address the following items:

- Purpose of evaluation and methodology used
- Purpose of activity(ies) evaluated
- Findings and conclusions (relate to questions)
- Principal recommendations
- Lessons learned

Mission or Office:

USAID/Jordan

Date This Summary Prepared:

December 11, 1989

Title And Date Of Full Evaluation Report:

Evaluation Report of the MDP, March 1989

Purpose of Evaluation: To determine: 1) mid-course corrections needed to enhance the probability of meeting the project goal and purpose; and 2) whether AID should program additional resources toward achievement of the project purpose.

Methodology Used: review of documents and reports relevant to the project; interviews with officials of the University of Jordan, FFAS, the Industrial Development Bank, the Jordan Institute of Management, the Ministry of Planning, AID, and contractors; survey of past and current students/trainees and their employers; and survey of Jordanian business persons and students that have not utilized JIM and FFAS services.

Purpose of Activities Evaluated: The purpose of the Management Development Project is to improve business management practices in Jordan through the establishment or upgrading of the following management programs: Master in Business Administration (MBA) at the Faculty of Economics and Administrative Sciences (FFAS), University of Jordan; Master in Health Services Management at FFAS; and short term training at the Jordan Institute of Management (JIM)

Findings, Conclusions, and Recommendations:

MBA PROGRAM: Findings and Conclusions:

1. Impact on business management practices? There have been too few graduates for any impact to be observable.
2. Ability of FFAS to ensure that MBA program addresses areas of greatest need? FFAS has done very little to determine the specific needs of Jordanian managers.
3. What has prevented individuals and businesses from more extensive use of the MBA program? One of the principal reasons is the low level of awareness of the MBA program in the business community.
4. Improvements in Institutional Capacity at FFAS? The most visible evidence of improvement is in the increased utilization of computer hardware and software. In addition improvements have been made in the library, the availability of audio-visual equipment, and skills of professors and staff.
5. Meets accreditation standards of the American Assembly of Collegiate Schools of Business? The MBA program does not meet standards in a number of areas including: inadequate numbers of teaching and administrative staff; excessive teaching loads; low level of research and publication; lack of required courses in production management, legal environment, and policy analysis; and lack of sufficient library and computer facilities, mainly due to short working hours.
6. Extent of knowledge and skills transfer from project funded teachers/advisors to faculty and students? Skills of FFAS students have been developed in a satisfactory manner, while some staff training in computing has resulted.
7. Extent to which U.S. training has improved curriculum and teaching methods? Faculty and staff members spoke highly of U.S. training. Computer training had a quite positive impact which is continuing to grow.
8. Extent to which new equipment has contributed improved curriculum and teaching methods? Computers are used heavily by students and are obviously having an impact. Demand is high for courses which train students in utilizing computers to solve business problems.
9. Is there sufficient demand to cover program costs? Sufficient demand exists to fill program openings, but costs will never be covered without radical changes in tuition.
10. Should AID continue to work with the program? Should other institutions/programs be established? AID should continue to support the MBA program at FFAS, especially if the salary issue can be resolved. In addition, AID should fund a feasibility study for the establishment of a new, private MBA program in Jordan. If the salary issue is not resolved at FFAS and the results of the feasibility study are positive,

then AID should support the new program. The existence of two programs is probably justified by the perceived high demand for business education and the expected differences in the quality of the two programs.

11. Needed organizational changes, including separate faculty of business? A separate faculty would raise the visibility of the business programs at the University, ensure that the Dean has a degree in business, and that he understands business programs.

12. Changes in personnel compensation systems? In promotion/tenuring systems? FFAS salaries are insufficient to attract and retain the best faculty members.

MBA PROGRAM: Principal Recommendations:

- Organizational and Management Changes: FFAS should appoint an MBA Program Director with sufficient release time from teaching to allow for proper administration of the program. Department Chairpersons in accounting and business administration should also be allowed a one course teaching release to provide more time for administration. The Dean of FFAS should appoint a committee to study the possibility of creating a separate Faculty of Business Administration.

- Staff: FFAS should continue efforts to attract two additional doctorally qualified faculty members in Finance. Until such members are successfully recruited, it is desirable that USAID should continue to fund one American professor of finance. At the same time the University of Jordan should initiate a complete review of the way specialization allowances are indexed to base salary; the world market for business professors suggest that they should be indexed at a level comparable with those of engineers. FFAS should ensure that professors are trained in computer software packages and that they incorporate them into their courses.

- Teaching Loads: FFAS should reduce loads through changes in class size, scheduling and other mechanisms; in addition, FFAS should limit the number of preparations to three per semester.

- Research and Publication: FFAS should charge a committee with responsibility for actively seeking grant proposals for funding under the USAID project.

- Curriculum: FFAS should add three courses in production management, legal environment, and business policy in order to meet the standards set by the American Association of Collegiate Schools of Business. To offset this increase in workload FFAS should: reduce the number of required credits in the area of specialization to nine, incorporate the comprehensive examination into the business policy course, and eliminate the thesis option.

- Students: While admission requirements are reasonable, they should be administered in a more flexible fashion. FFAS should establish a committee that has the authority to make exceptions to established conditions and has an input into the establishment of acceptance requirements. As program demand builds up, it would be desirable to raise admissions criteria. In order to address student concerns and the low level of graduates to date, FFAS should establish a committee chaired by the Dean to review and act on suggestions made by MBA students.

- External Relationships: FFAS should undertake the following actions to promote its program and to increase its relevance to the business community: appoint an MBA Director; establish a business advisory council of prominent business leaders; encourage faculty members to consult in the business community; encourage the faculty to join professional associations; invite business leaders to speak to MBA students; encourage businesses to sponsor employees participation in the MBA program.

- Facilities: FFAS should use remaining project funds to strengthen the journal collection. In addition, the University should extend library hours to better serve MBA students and others who find it necessary to

use the facilities in the late afternoon and evening. Computer labs should be open for student use when not being used for teaching.

MASTERS IN HEALTH SERVICES MANAGEMENT: Findings and Conclusions:

1. Impact on management practices? The program has had a positive affect on health services management practices. There is wide support for the program among the health services community and especially among the employers of its graduates.
2. Ability of FFAS to ensure that program addresses areas of greatest need? There has not been a careful assessment of the need or potential demand for the numerous categories of health service administrators in Jordan, either by the University or the Government.
3. What has prevented individuals and businesses from more extensive use of the HSMP? The health services community is well aware of the program; the only constraint may be that the program does not yet measure up to international standards.
4. Improvements in Institutional Capacity at FFAS? While capacity has been improved, the HSMP is still not a viable graduate program principally because it still relies heavily on the presence of an AID funded professor. The crucial time will be when two project-funded PhD's complete their studies.
5. Meets accreditation standards of the Accrediting Commission on Education for Health Services Administration in the U.S.? The HSMP does not meet standards in the following areas: lack of permanent full-time faculty; lack of research; need to upgrade some content areas of the curriculum; lack of departmental status; and the fact that its host institution, FFAS, is not accredited.
6. Extent of knowledge and skills transfer from project funded teachers/advisors to faculty and students? The one project funded professor was given high marks by students for his knowledge, teaching ability, and helpfulness.
7. Extent to which U.S. training has improved curriculum and teaching methods? As of the date of evaluation the two project funded PhD candidates were still studying in the U.S.
8. Extent to which new equipment has contributed improved curriculum and teaching methods? Not answered specifically for HSMP. See comments under MBA program.
9. Is there sufficient demand to cover program costs? Like MBA program sufficient demand exists to fill program openings, but costs will never be covered without radical changes in tuition.
10. Should AID continue to work with the program? Should other institutions/programs be established? AID should continue to work with HSMP to ensure its sustained growth and development.
11. Needed organizational changes? FFAS is the most logical venue for the continued operation and expansion of HSMP. However, the latter should evolve into a separate department within FFAS.
12. Changes in personnel compensation systems? In promotion/tenuring systems? FFAS salaries are insufficient to attract and retain the best faculty members.

MASTERS IN HEALTH SERVICES MANAGEMENT: Recommendations:

- Organization and Management Changes: HSMP should evolve into a separate department within FFAS, and FFAS should appoint a senior, qualified academic to replace the current Visiting Professor/Program Coordinator. USAID/Jordan should fund the services of the current Professor/Coordinator for an additional year so that he might act as an advisor to his replacement. USAID should also consider funding the services of the current lecturer in health finance for two years to assure program continuity.
- Compliance with Standards: The Dean of FFAS should appoint two faculty members to assist the health services faculty in identifying changes that are required to meet the criteria established by the Accrediting Commission on Education for Health Services Administration.

Also, FFAS should place greater emphasis on research in health services management, and try to better organize the experiential learning component of the program.

- External Relationships: FFAS should appoint an advisory committee to HSMP that would meet at least once a year to review progress and provide guidance. In conjunction with the advisory committee, HSMP should also initiate the creation of an independent professional association, similar to the American College of Healthcare Executives.

- Demand: The University, the National Medical Institute, the Ministries of Planning and Health, and private hospitals should collaborate in a major health manpower research project to determine educational needs for all categories of health care workers.

- Class Scheduling: FFAS should schedule classes at times that are more convenient for part-time students.

JORDAN INSTITUTE OF MANAGEMENT: Findings and Conclusions:

1. Impact on management practices? JIM has had an impressive impact at the knowledge/information and skill attainment level of its participants, who are mostly mid-level managers. However, it is difficult to measure changes in business management practices as a result of JIM training.
2. Ability of JIM to ensure that program addresses areas of greatest need? JIM conducts informal meetings and intuitive needs assessment with the Jordanian business community. Better follow-up is required to assure that training fits business needs.
3. What has prevented individuals and businesses from more extensive use of JIM courses? Jordanian businesses would use JIM more extensively if the following were available: specialized courses for individual firms; flexible hours and expanded course offerings; less theory and more in-office applicability. Cost of the courses was not a serious hindrance.
5. Meets accreditation standards? Not applicable to JIM.
6. Extent of knowledge and skills transfer from project funded teachers/advisors to staff and trainees? Skills training has been of high quality as evidenced by JIM's ability to now conduct courses developed by on its own. Trainee evaluations range from 80-95% positive for the six courses developed and delivered by IRD.
7. Extent to which U.S. training has improved curriculum and teaching methods? U.S. training has concentrated on the professional development of JIM trainers rather than the development of new curriculum based on U.S. courses. All trainers reported significant changes in training styles as a result of observing the ways in which courses are delivered in the U.S.
8. Extent to which new equipment has contributed to improved curriculum and teaching methods? New equipment has had a significant impact. JIM has been able to offer courses in computer skills development for the first time. In addition, JIM has introduced computer-based learning in many of its courses.
9. Is there sufficient demand to cover program costs? While the growth in demand for JIM courses has been impressive, it is still inadequate to cover operating costs. Increasing the number of participants per course and adding a few new course per trainer would considerably reduce the budget deficit.
10. Should AID continue to work with JIM? Should other institutions/programs be established? AID should continue to work JIM, especially in providing assistance on institutional development areas such as the development of a strategic plan and more aggressive marketing tactics. AID support of alternative middle level, private training institutions is not prudent at this time.
11. Needed organizational changes? Both JIM staff and Jordanian businesses are positive about JIM's operation as a division of the Industrial Development Bank and believe that a continuing association is desirable.

12. Changes in personnel compensation systems? Present compensation levels are attracting well-qualified personnel at all levels of JIM. There is no indication that this will change in the future.

JORDAN INSTITUTE OF MANAGEMENT: Recommendations:

- Strategy: JIM needs to establish a long range strategic plan and aggressive marketing strategy that build on the positive training climate among the Jordanian business community. The marketing strategy should emphasize the importance of personal contacts. The technical assistance contractor, IRD, can assist in this regard by shifting the emphasis of its assistance toward more direct overall technical assistance for the entire JIM program.
- Staff: JIM should contract out for trainers for specialized courses. New trainers should only be hired if they are immediately able to generate sufficient revenue to cover their costs. Future staff training should be geared specifically towards institutional rather than professional development. In other words, JIM professors should take courses which can be adapted immediately for use at JIM. A maximum of two short term courses should be taken during a month of U.S. training.
- Curriculum: JIM should make a concerted effort to reach new executive level markets with high level seminars, conferences, and policy dialogue. JIM should also consider: expanding in-house specialized courses for individual Jordanian firms; more computer based accounting, finance and management training; and basic training in computers, accounting and finance, and management. JIM should also develop about 25-50 Arabic language case studies focussed on management problems in the country and region.
- Organizational Changes: JIM should establish a separate marketing unit which is devoted exclusively to the marketing of JIM services. In addition, JIM needs to better coordinate the activities of the training section with the Manufacturing and Marketing Improvement Section (MMIS), which is also receiving AID assistance.
- Training Demand and Impact: JIM should establish better follow-up mechanisms with graduates, and conduct both formal and informal demand/needs assessments for its courses. JIM should make a concerted effort to measure the extent of impact and skill transfer.

Lessons Learned:

- While AID included covenants in the project agreement concerning adequate compensation of JIM and FFAS staff, this was obviously not enough to ensure that salaries were high enough to attract and retain qualified staff.
- Training organizations are generally more responsive to the needs of the business community if they must cover a major portion of their costs through user charges.
- Compensation for professors and trainers should be based on performance to help ensure that organizations cover costs.

ATTACHMENTS

K. Attachments (List attachments submitted with this Evaluation Summary; always attach copy of full evaluation report, even if one was submitted earlier; attach studies, surveys, etc., from "on-going" evaluation, if relevant to the evaluation report.)

Evaluation Report of the Management Development Project - Jordan, Development Associates, Inc., March 1989.

COMMENTS

L. Comments By Mission, AID/W Office and Borrower/Grantee On Full Report

In general USAID/Jordan agrees with most of the findings, conclusions, and recommendations of the evaluation report. The evaluation was conducted in a professional manner by all members of the four person team. However, it would have been desirable for the consultants investigating the MBA program and the HSMP to have spent additional time in Jordan evaluating the impact of these programs and their relation to the client community. It would have also been desirable if the three programs had developed computer based information systems on all their students prior to the evaluation. This would have facilitated the measurement of the impact of the various programs.

MBA Program: As suggested by the evaluation, USAID has conducted a feasibility study for the establishment of a private graduate business school; the results of the study are positive. USAID is now assisting a local group of private businessmen to establish the school. Support for the program at FEAS will continue through the current expiration date of the grant agreement. If FEAS can identify qualified candidates for PhD's programs in the U.S., then AID may provide funding under a separate training project.

JIM: While it may be desirable for JIM to expand into the executive level market as suggested by the evaluators, current staffing and budget limitations and JIM's traditional focus on mid-level managers make it highly unlikely that this can be accomplished in the near future. AID takes exception to the evaluation conclusion that JIM compensation is adequate. While it is true that JIM has been able to retain training staff under the current system, they were not been able to attract new high caliber staff in their new consulting division, the Manufacturing and Marketing Improvement Section. As a result, JIM's parent organization, the Industrial Development Bank had to allow a special exemption to the standard pay scale.

It should be noted that JIM took strong exception to the evaluation finding that it was hard to measure changes in business management practices as a result of their training. JIM believes that significant changes have resulted from their training.

HSMP: AID does not intend to fund the services of the locally hired lecturer in the program as suggested by the evaluators.

64187

EVALUATION REPORT
of the
MANAGEMENT DEVELOPMENT PROJECT
JORDAN

Under Contract No. PDC-0085-I-6098-00⁰⁵
^

Submitted To:

USAID / JORDAN

Submitted By:

DEVELOPMENT ASSOCIATES, INC.
2924 Columbia Pike
Arlington, Virginia 22204

Prepared By:

Mr. William B. Berg - Development Associates, Inc.
Dr. Richard F. Southby - George Washington University
Dr. Donald A. Swanson - Development Associates, Inc.
Dr. Richard R. Weeks - University of Rhode Island

March, 1989

EVALUATION OF THE
MANAGEMENT DEVELOPMENT PROJECT

Amman, Jordan February - March, 1989

TABLE OF CONTENTS

	<u>PAGE</u>
EXECUTIVE SUMMARY	1
BASIC PROJECT IDENTIFICATION DATA	5
<u>PART ONE: INTRODUCTION</u>	6
I. Evaluation Methodology	6
II. Background & Context of Project	7
<u>PART TWO: MASTER OF BUSINESS ADMINISTRATION (MBA)</u>	10
I. Introduction	11
II. Project Goal & Purpose	11
III. MBA Program	12
A. Faculty & Staff	13
1. Critical Mass	14
2. Administration	15
3. Teaching Loads	15
4. Course Preparation	16
5. Faculty Qualification	16
6. Research & Publication	17
7. Salaries	18
B. Students	19
1. Admission Process	20
2. Quality of Student Body	21
3. Graduating Students	22
4. Student Satisfaction	23

C.	Curriculum . . . . .	.25
1.	Common Body of Knowledge . . . . .	.25
2.	Breadth Requirement . . . . .	.26
3.	Change in Program Design . . . . .	.26
D.	Library, Computers, Facilities, & Services	
1.	Library . . . . .	.27
2.	Computer Laboratories . . . . .	.29
3.	Training & Audio-visual Aids . . . . .	.30
E.	External Relationships . . . . .	.30
F.	Organizational Venue . . . . .	.32
G.	Questions Answered . . . . .	.36

PART THREE: MASTER OF HEALTH SERVICES MANAGEMENT .39

I.	Introduction . . . . .	.40
II.	Objectives . . . . .	.40
III.	Health Services Management Program . . . . .	.41
A.	About the Program . . . . .	.41
B.	Faculty . . . . .	.41
C.	Students . . . . .	.43
D.	Measured Standards . . . . .	.44
E.	Impact & External Relationships . . . . .	.47
F.	Organizational Venue . . . . .	.50

PART FOUR: JORDAN INSTITUTE OF MANAGEMENT52

I.	Introduction . . . . .	.53
A.	Background . . . . .	.53
B.	Methodology . . . . .	.53
II.	Statement of Objectives of Grant Project . . . . .	.53
III.	Activities / Outputs . . . . .	.54

A.	Service delivery of JIM . . . . .	.54
B.	Westinghouse Technical Assistance . . . . .	.54
C.	Funding / Expenditures of Project . . . . .	.55
IV.	Training Program . . . . .	.55
A.	Short Term Training . . . . .	.55
B.	Training Courses & Curriculum . . . . .	.59
C.	Training Demands / Needs . . . . .	.62
D.	Training Effectiveness . . . . .	.64
E.	Training Impact . . . . .	.66
F.	Training Limitations . . . . .	.67
V.	JIM Institutional Issues . . . . .	.69
A.	Institutional Capability Improvement . . . . .	.69
B.	Training Costs . . . . .	.72
C.	JIM Sustainability . . . . .	.75
D.	Organizational Structure & Changes . . . . .	.77
E.	JIM Personnel Compensation . . . . .	.79
VI.	Overall Conclusions . . . . .	.80
VII.	Overall Recommendations . . . . .	.80

PART FIVE: APPENDICIES

Appendix A	Evaluation Scope of Work
Appendix B	Log Frame of Project
Appendix C	Evaluation Format
Appendix D	Interviewing Lists
	1. MBA
	2. HSM
	3. JIM
Appendix E	Records Review
	1. MBA
	2. HSM
	3. JIM
Appendix F	Standards
	1. Excerpts from AACSB
	2. Criteria for HSM
Appendix G	Cooperative Agreement
Appendix H	JIM - Short Term Training Programs
Appendix I	JIM Training and Financial Information
Appendix J	JIM Financial Report

EXECUTIVE SUMMARY

As a result of USAID/Jordan initiating an evaluation of the Management Development Project (278-0261), Development Associates undertook this assignment with a four-person team under their Development Information and Evaluation IQC.

This evaluation is an interim review of a U.S. \$5 million grant that began in 1984 with a planned completion date (PACD) of 1991. The purpose of the evaluation is to 1) recommend what, if any, mid course corrections can and should be made to enhance the probability that the original project goal and purpose will be met; and 2) whether AID should program additional resources toward achievement of the project purpose.

The goal of the Management Development Project is to achieve better business management practices and to increase the availability of more managers with both general and specific skills. Its purpose is to institutionalize an educational / training process and to transfer the necessary technology to improve the quality and increase the quantity of professionally competent Jordanian business managers available in general and specialized skill areas.

The Management Development Project involves the establishment and/or upgrading of the following management programs in Jordan:

- Master of Business Administration at the University of Jordan;
- Master in Health Services Administration at the University of Jordan; and
- Short term training activities at the Jordan Institute of Management (JIM).

The principal inputs of the project include technical assistance, faculty and staff training, training aids and research grants.

In conducting this review, attention was given to the twelve specific questions included in the Statement of Work. In the cases of the two academic programs, the Accreditation Standards and Guidelines for MBA Programs and the Criteria for a Graduate Program in Health Services Administration were used as a basis for assessing the quality of these two programs. The evaluators conducted interviews with the faculty, staff, and students of all three organizations and with a wide variety of business personnel. There was an extensive review of records and files.

Masters in Business Administration (MBA) Program

In reviewing the Masters in Business Administration Program, the evaluators found some encouraging facets in this young program. These include the number of qualified faculty members, the quality of the student body, the book collection at the library and the impact of the AID-funded computers.

While the qualifications and the critical mass of the faculty are sufficient in accounting and management, it is recommended that two more doctorally qualified persons be attracted in the field of finance and that in the meantime USAID, through the IRD/Westinghouse contract, provide one visiting professor of finance. The teaching loads and the number of course preparations of the faculty are excessive. This load should be reduced in order to free the faculty to do more research, write more journal articles, and provide consultations to Jordanian businesses.

The problem that has the potential to keep this program from reaching desired levels of excellence is the low salaries provided these faculty members as compared to other faculty members in the University of Jordan. Salaries are insufficient to keep productive faculty members. This is a major cause of low morale.

While the MBA program is now in its 6th year, it has graduated less than twenty students. At first look, this seems to be a minimal result for such a program. However, because of some start-up problems and due to the fact that most of the students have full-time employment resulting in a slower throughput, this lack of graduates is more understandable. By concentrating on other quality improvements recommended in this report, it is felt that this problem will correct itself in due time.

The common body of knowledge conforms to most requirements except in production management, legal environment, and policy analysis. This report makes some recommendations of programming that will help alleviate this situation.

It was found in interviewing Jordanian business personnel and various business associations that they have little or no knowledge of the MBA program. Considering the low number of graduates, the lack of business consultations by the faculty members, and the absence of a director with adequate time to pursue these business contacts, this finding should be of no great surprise.

The issue has been raised as to the appropriate organizational venue of the MBA program ---that is, as is within the Faculty of Economics and Administrative Sciences at the University of Jordan, or as an external private organization on its own. The evaluator found advantages to both options. This paper recommends that if there is a request and/or interest in the business community for a separate, external MBA program, that USAID fund a feasibility study to determine the degree of this support, especially financial. If the salary issue of the present MBA program is not solved, and if the results of the feasibility study enthusiastically favor the establishment of a private MBA program, the evaluator recommends that USAID consider providing whatever support to this separate organization is appropriate in its purpose of encouraging quality management in Jordan. Support for the present MBA program should be continued.

Master Program in Health Services Management (HSM)

Considering that the Health Services Management Program has only been in existence for four years, it has been successful in producing a significant number of graduates that have been placed in positions of administrators of health services.

At the present time, there are only two faculty members in this program,-- one funded under the IRD/Westinghouse contract and the other funded as non-career staff by the university. In addition, there are two persons completing doctoral studies in the United States. These persons will return to take up positions as full-time Assistant Professors of Health Services Management.

The two faculty members receive high marks from the students. However, being only two of them, the potential variety, depth, and breadth of the program is, of course, limited. The evaluator recommends that the senior faculty member be

extended by the USAID-funded IRD contract one more year and that a senior appropriately qualified and experienced professor be appointed to overlap and then replace him. It is also recommended that the present junior faculty member be funded by USAID to assure continuity of a program that has a good start.

This paper measures the Health Management Program against the standards of the Accrediting Commission and finds that while good progress has been made, it falls short of these standards.

Wide support for this program was found among employers of its graduates. Everyone interviewed indicated a clear demand for the HSM. The evaluator recommends that an advisory committee to the HSM program be created to provide relevant input to the program. Also, AID/Washington should establish a Cooperative Agreement with the Association of University Programs in Health Administration to disseminate information and support services on health service administration and health services management to the University of Jordan.

The evaluator felt that this program should evolve into a department within the FEAS when the Jordanian faculty members return to the University.

Jordan Institute of Management (JIM)

There is solid evidence that the Jordan Institute of Management (JIM) training is of high caliber and perhaps one of the top two or three training institutions in Jordan. There is also strong evidence that JIM training is being used by participants in their institutions, demonstrating fairly positive impacts in those businesses.

The IRD / Westinghouse technical assistance model is working well. The new courses that they have introduced have been integrated into the JIM curriculum and have assisted in improving the training methodology of its trainers. Now, however, JIM and IRD should work together toward a more "institutional building" effort in both their participant training of faculty and in their technical assistance.

JIM's most prominent issues relate to its need to do some serious strategic planning about the future. Its present budget situation is unacceptable and requires new emphasis on the marketing of JIM's programs. It needs to reorganize to become more efficient with new courses, new clients, and new strategies to attract more students per course. To anticipate the need for more trainers, it should at least contract with outside specialists the training in those fields requiring their expertise.

JIM officials should make a concerted effort to reach beyond the mid-level manager and train the executives with high level seminars, conferences, and policy dialogues. They should also become more active in the basic programs of computers, accounting, finance and other basic management level training offerings.

The overall picture and value of JIM is very positive, but to continue to grow rather than stagnate, it must now take some bold steps to become a self-sustaining, integrated, excellent management training organization.

Final Conclusion and Recommendation

The evaluators, without exception, believe that USAID/Jordan has been correct in providing assistance in these three programs, and recommend whole-heartedly that USAID continue this support by designing their assistance around helping these organizations follow the recommendations resulting from this report.

BASIC PROJECT IDENTIFICATION DATA

1. Country: Jordan
2. Project Title: Management Development
3. Project Number: 278 - 0261
4. Project Dates:
 - a. First Project Agreement: 18 September 1984
 - b. Final Obligation Date: 18 September 1984
 - c. Most Recent PACD: 31 December 1991
5. Project Funding:

a. AID Bilateral Funding Grant	US\$ 5,000,000
b. Other Major Donors	US\$ -
c. Host Country Counterpart Funds	US\$ 2,355,000
Total	<u>US\$ 7,355,000</u>
6. Mode of Implementation:
 - a. Host Country Contract (FEAS) with IRD, Westinghouse
 - b. Host Country Contract (JIM) with IRD, Westinghouse
7. Project Designers:

USAID/Jordan, Government of Jordan: Ministry of Planning, University of Jordan, & Jordan Institute of Management
8. Responsible Mission Officials:
 - a. Mission Directors: Gerald F. Gower and Lewis Reade
 - b. Project Officer: Richard Rousseau
9. Previous Evaluation: None

Best Available Copy

PART ONE - INTRODUCTION

I. EVALUATION METHODOLOGY

This report presents the findings, conclusions and recommendations of the external evaluation team of Development Associates who were contracted by AID under the Development Information and Evaluation Indefinite Quantity Contract No. PDC-0085-I-00-6098-00

The scope of work for this report specified that this evaluation should review the status of the overall project entitled "Management Development - Jordan" with particular emphasis on its twelve questions (Appendix A) that the evaluators were to consider. The format shown in Appendix C was used by the evaluators to assure concentration on the major issues raised by these questions in ascertaining the findings, conclusions, and recommendations.

The Evaluation Team:

- * Mr. William Berg, Senior Associate of Development Associates, was the team leader and coordinator.
- * Dr. Richard Southby, the Chairman of the Department of the Health Services Administration at George Washington University was the key evaluator of the Health Services Management Program in the Faculty of Economic and Administrative Sciences (FEAS) at the University of Jordan.
- * Dr. Donald Swanson, Corporate Training Specialist for Development Associates, was responsible for the evaluation of the Jordan Institute of Management (JIM).
- * Dr. Richard Weeks, Professor and former Dean of the College of Business Administration at the University of Rhode Island, took on the task of evaluating the Masters of Business Administration within the FEAS at the University of Jordan.

This report contains five parts including this introduction:

- Part II---Masters in Business Administration Program
- Part III--Health Services Management Graduate Program
- Part IV---Jordan Institute of Management
- Part V----Back-up documentation of the findings.

The evaluation team has incorporated into this report comments received from USAID, FEAS, JIM, and business personnel--both those using the services of these programs and those not using these services.

In the cases of the two academic programs, the U.S. Accreditation Standards for MBA programs and for Health Services Administration (See Appendix F-1 and Appendix F-2) were used as a guide and format in assessing the growth, capabilities, and weaknesses of these Jordanian programs.

In the writing of this report, each of the three programs are being considered separately. Each sub-topic within these programs is reviewed by first listing the findings followed up with the evaluator's conclusions and then the recommendations, if any.

II. BACKGROUND AND CONTEXT OF THE PROJECT

Jordan, with a high population growth rate and limited agricultural land available must of necessity rely on the business sector as most critical to its economic stability and growth. It was found that many business management systems are still structured more in accordance with traditional family practices and thus, lack professionally competent middle and senior level business managers using scientific managerial techniques.

This need for professionally trained managers in the business sector was recognized by the Government of Jordan and in 1981 they initiated a series of discussions with USAID. This resulted in a formal request to USAID to finance consultancy services to help design a management development project for the business sector. In 1984 a four man consultancy team went to Jordan to fulfill this requirement. The reports of this team were used to design the Management Development Project. This design was aimed at improving the quality of Jordanian business management, helping fill the need for managers in certain special categories such as health and hospital administration, banking & finance, and to generally increase the number of trained managers available.

The Management Development Project was to contribute to Jordan's management training needs by providing assistance to two well-established Jordanian institutions --- the Faculty of Economics and Administrative Sciences (FEAS) at the University of Jordan and the Jordan Institute of Management (JIM).

A. Faculty of Economics and Administrative Sciences

Prior to this project, FEAS, over its 18 year history, had graduated over 4,000 B.A. students, most of whom found jobs in the private sector. FEAS was comprised of five departments: Accounting, Business Administration, Economics & Statistics, Political Science, and Public Administration. The project assistance would focus on the Department of

Accounting and the Department of Business Administration. In 1983, FEAS began a small MBA program with 28 students.

The FEAS portion of the project includes further assistance in the establishment of an MBA program with specializations in accounting, management, finance and marketing and the establishment of an MS program in health services management. A \$2,800,000 host country contract has been signed with Westinghouse Institute for Resource Development (IRD) to provide professors, curriculum development, staff training, and training materials and equipment.

Since 1984, 300 students have been admitted to the MBA program. Of these, less than 20 students have graduated while 160 are matriculating with over 100 drop-outs.

A master's degree program in Health Services Management has been initiated with a total of 57 students thus far enrolled. Of these, 28 have graduated with only 7 drop-outs.

Three staff members have completed short term participant training and two PhDs in health management are in process. Courses in marketing, finance, and health management have been developed or upgraded and 49 personal computers have been installed and are operational. The library has been upgraded.

B. Jordan Institute of Management

In 1976, the Industrial Development Bank (IDB) issued a resolution establishing JIM as a division of the Bank. JIM now offers over 50 short term courses, ranging in duration from one to four weeks in a variety of subject areas. It's participants come from a wide selection of private and public entities, though private sector participants predominate. Prior to this project JIM averaged over 500 participants annually.

In February, 1987 a \$1,100,000 host country contract was signed with Westinghouse IRD for the delivery of short management courses, curriculum development, staff training and the provision of training materials and equipment to JIM.

Since then, IRD has completed the second delivery of six new courses in which about 220 managers attended. From 1984 to 1989, over 3,000 persons completed JIM courses. Six staff members completed U.S. training and 24 personal computers and library materials have been purchased.

The following parts of this report will each deal specifically with the three major segments of the project. In each, the evaluators will present their findings, conclusions and recommendations. These will satisfy the twelve questions requested in the Scope of Work of this project evaluation.

No surprises are in this report. We found three programs with many problems. However, considering that these programs are relatively new, they are doing quite well. Our findings are that a good and substantive start has been made and that each of the three segments, with all of their problems, with continued assistance should continue to grow, prosper, and provide the Kingdom of Jordan with a better equipped and prepared group of managers in its private sector. We hope that this report will help these institutions in their pursuit.

The evaluators unanimously appreciate the support of FEAS, JIM, and USAID in their assistance in developing these findings and especially want to thank them for their frank and open discussions with the evaluators.

PART TWO

MASTER OF BUSINESS ADMINISTRATION (MBA)

PROGRAM

FACULTY OF ECONOMICS AND ADMINISTRATIVE SCIENCES

UNIVERSITY OF JORDAN

RICHARD R. WEEKS, D.B.A.
Professor of Marketing
University of Rhode Island

MANAGEMENT DEVELOPMENT PROJECT EVALUATION

MASTER OF BUSINESS ADMINISTRATION (MBA) PROGRAM

I. INTRODUCTION

The objective of this component of the project evaluation is to conduct a mid-term evaluation of the Master of Business Administration (MBA) program, Faculty of Economics and Administrative Sciences (FEAS), University of Jordan, Amman, Jordan.

In conducting this review, attention has been given to the specific questions included in the Scope of Work (Appendix A) which are relevant to the MBA program. The "Accreditation Standards and Guidelines for MBA Programs" (Appendix F-1) which have been adopted by the Accreditation Council of the American Assembly of Collegiate Schools of Business (AACSB) were utilized as a basis for assessing the quality of the MBA program offered by FEAS. Interviews were conducted with members of the administration of the University of Jordan and FEAS, members of the faculty and staff of FEAS, students enrolled in and graduates of the MBA program, the Head of the Periodicals Department of the University of Jordan Library, members of the business community, and the executives of several business associations located in Amman (Appendix D-1). An extensive records review was conducted (Appendix E-1). Facilities were also visited so that an assessment of their adequacy could be made.

Findings, conclusions, and recommendations will be presented so that mid-term adjustments can be made to enhance the probability that the original goal and purpose of the project will be met. The desirability of USAID/Amman providing additional resources to the project will be discussed.

Consideration will also be given to the possibility of establishing a private, free-standing MBA program in Amman with possible affiliation with an American university or a consortium of American universities.

II. PROJECT GOAL AND PURPOSE

The original goal of this project was to achieve better business management practices and the availability of more managers with both general and specific skills. The purpose was to institutionalize an education/training process and to transfer the necessary technology to improve the quality and increase the quantity of professionally competent Jordanian business managers available in general and specific skill

12

areas. The establishment of a high quality MBA program in the FEAS, University of Jordan, was to be one of the major vehicles utilized to accomplish the goal and purpose.

The principal inputs of the project included technical assistance, faculty and staff training, training aids, and research grants.

The expected outputs included MBA graduates, upgraded/trained faculty and staff, new and upgraded curricula, research projects completed undertaken, and training aids installed.

III. MASTER OF BUSINESS ADMINISTRATION (MBA) PROGRAM

The MBA program was started by the FEAS in 1983, with twenty-eight students enrolled. Most MBA students have some work experience, and most hold full-time jobs during the day and attend classes in the late afternoon and in the evening. Approximately 125 students are currently enrolled, although fewer than twenty students have graduated to date and received their MBA degree.

MBA programs are designed to train managers with general competence for overall management, and are not designed to train managers who wish to become technical specialists in specific disciplines. Most MBA programs do provide limited opportunities for specialization, however, and the MBA program offered by the FEAS does this in the following fields:

- accounting
- finance
- management
- marketing

The program design at the FEAS contains the following requirements:

- 9 credit hrs. of required prerequisite work
 - principles of statistics (3)
 - principles of economics (3)
 - general mathematics (3)
- 9 credit hrs. of prerequisite work selected from the following four courses (those selected must be outside of the field of specialization):
 - fundamentals of management (3)
 - fundamentals of accounting (3)
 - principles of marketing (3)
 - financial management (3)

- 9 credit hrs. of elective course work selected from offerings in the field of specialization plus 9 crt. hrs. for a thesis completed and approved in the field of specialization

or

- 18 crt. hrs. of elective course work selected from offerings in the field of specialization plus passing a comprehensive examination in the field of specialization.

A contract between the FEAS and the Institute for Resource Development, Inc. (IRD/Westinghouse) was signed on June 26, 1986. The contract calls IRD/Westinghouse to provide visiting faculty members to the FEAS, arrange both short and long-term academic training for current and new FEAS faculty so they can replace the visiting faculty members supporting FEAS programs during the first years of the project, the acquisition of training aids in the form of library materials and audio-visual equipment for the FEAS, and the acquisition of computer hardware and software for the FEAS.

A. FACULTY AND STAFF

The FEAS should have faculty, staff, and other instructional and support resources of sufficient quantity and quality to foster overall high quality in the MBA program. In order to assess the degree to which this high quality is being achieved, a review was conducted of the faculty and staff teaching in the MBA program. Extensive interviews were also conducted with members of the administration, the faculty, and the staff. Many activities contribute to overall high quality. Frequently these activities are highly interrelated, but the most important of these inputs are presented separately here in order to enhance the ease of presentation and understanding:

AACSB Standard III, Personnel, the relevant portions of which have been reproduced in Appendix F-1, has been used as a benchmark in judging whether faculty and staff resources are sufficient to foster overall high quality in the MBA program.

It is believed that the recommendations contained in this section are all desirable to enhance and improve the MBA program. Some of these recommendations may be possible within the funding provided by the current grant. Others will undoubtedly require additional funding and will need to be considered in that context.

1. CRITICAL MASS

In Judging whether a critical mass of the faculty is present, consideration such as depth and breadth of professional interest is represented.

a. Findings

accounting	7 faculty members
finance	1 faculty member
management	6 faculty members
marketing	2 faculty members

16 faculty members

computer laboratory-2 staff members (a third member of the staff is currently in the hospital and about to have a baby).

b. Conclusions

Sufficient numbers of qualified faculty members currently exist in accounting and management to easily satisfy this requirement. In the area of finance, the one current faculty member does not satisfy this requirement and two additional people need to be added. Marketing is marginal in terms of having the critical mass to meet this requirement. If Dr. Fuad Sheikh Salem does not return to FEAS from his current assignment at Yarmouk University, a replacement will be needed to satisfy this requirement.

One additional staff member is needed in the computer laboratory if the hospitalized staff member does not return. This staff member could increase the number of courses taught and assist in increasing the hours when the laboratory is open.

c. Recommendations

It is recommended that efforts to attract two additional doctorally qualified faculty members in finance be continued. This would provide the critical mass necessary to provide continuity to the program. Until these members are successfully recruited, provision of one terminally qualified foreign

faculty member in finance by USAID is badly needed and highly desirable.

2. ADMINISTRATION

a. Findings

The MBA program does not have an assigned director.

Department chairs are not awarded released time to cover their administrative responsibilities.

b. Conclusions

The MBA program requires additional administrative input and a director is needed who will receive released time from teaching responsibilities in order to provide this input.

Departmental activities require extensive administrative input and released time should be provided to the chairs of accounting and business administration to make it possible for them to increase this input.

c. Recommendations

An MBA program director should be appointed and provided with sufficient released time (at least a two course teaching release) from teaching responsibilities to permit the director to administer the program properly. It needs to be promoted actively in the business community of Jordan, and many linkages with the business community need to be created.

Department chairs in accounting and business administration need to be provided with a one course teaching release to provide more time for administration. This recommendation undoubtedly has broad implications for other administrative entities, and is deserving of careful consideration before implementation.

3. TEACHING LOADS

a. Findings

Professors are required to teach nine credit hours per week. Associate and assistant professors are required to teach twelve credit hours per week. Overload teaching of up to six credit hours per week is permitted.

This practice results in some faculty members who have total loads of 15 - 18 credit hours per week. This includes courses which are taught in the MBA program.

b. Conclusions

Teaching loads are excessive and loads in excess of twelve hours per week should not be permitted. Unfortunately, this matter is clearly tied to the salary issue and it may be difficult, if not impossible, to accomplish this if salaries are not substantially increased.

c. Recommendations

Teaching loads should be reduced to more acceptable levels if progress can be made on the salary issue. This is a difficult problem, but changing class sizes and scheduling patterns may also provide a mechanism for achieving improvement in this area.

4. COURSE PREPARATIONS

a. Findings

Several cases were found where faculty members had four different course preparations in a single semester.

b. Conclusions

Course preparations in excess of three different preparations during a semester should not be permitted. Whenever possible, course preparations should be held to two per semester.

c. Recommendations

The scheduling officer should be instructed to limit individual course preparations to three different preparations a semester. Reducing teaching loads should be very helpful in solving this problem.

5. FACULTY QUALIFICATIONS

a. Findings

All of the faculty members interviewed held the rank of assistant professor, associate professor, or full professor. All possessed the appropriate doctors degree for the field in which they were teaching. Most of the

doctorates were awarded by universities in the United States.

Examples include:

University of Illinois - Champaign
Ohio State University
University of Texas - Austin
CUNY
University of Wisconsin - Madison

b. Conclusions

Faculty qualifications are appropriate to permit teaching in the MBA program which reflects overall excellence.

c. Recommendations

No change is needed in the type of qualification being sought.

6. RESEARCH AND PUBLICATION

a. Findings

Scholarly productivity includes the quality and extent of research, and publication of findings from that research. The level of publication activity by members of the faculty ranged from zero publications to numerous publications. Several members of the faculty have published five or more articles.

Zero research proposals have been submitted requesting support from the USAID grant.

b. Conclusions

Faculty research and publication activity is generally below what would be expected of faculty members of comparable rank in the United States. FEAS Administration has been actively seeking research proposals from the faculty members. This below average activity can undoubtedly be contributed, at least in part, to the extremely high teaching loads carried by members of the faculty.

c. Recommendations

Charge a committee with the responsibility of actively soliciting faculty grant proposals. If grant proposal activity is still not

forthcoming, divert excess funds to provide other needed improvements.

7. SALARIES

a. Findings

Compensation for faculty members at the University starts with a base salary which is then adjusted for the area of specialization, transport, cost of living, etc. to determine the final salary on an annual basis.

Unfortunately, all of the specializations contained in the FEAS have been adjusted to only 60% of the base salary rate. This results in an enormous marketplace disparity, causes low morale, and encourages shopping for other offers. All of these conditions were found to exist with various faculty members in the FEAS.

Faculty members are compensated for overload teaching at the following rates:

professors	12 JD / cont. hr.
associate professors	10 JD / cont. hr.
assistant professors	8 JD / cont. hr.

b. Conclusions

Salaries are insufficient to keep the most productive faculty members in place. Many of them were assisted by the University of Jordan to work on doctorates abroad, i.e., faculty members are paid full salary while working abroad on doctorates. University rules require that faculty members spend two years teaching at the University of Jordan for every year they receive this assistance. If they leave before completing this obligation, they must pay back all money received plus a fifty percent penalty. Without this obligation, many faculty members would leave for higher paying jobs. Two faculty members had offers in hand from other Arab universities at approximately four times their current salaries. Salaries in the business and accounting disciplines in the United States all command a significant positive increment over most other

disciplines in universities. Annual salaries would average in excess of four times the current salary level at the University of Jordan.

c. **Recommendations**

Continue efforts to convince the President that a complete review of the way university salaries are indexed to the base salary is essential. The World marketplace for business professors clearly indicates that they should be indexed at a level comparable to the level of the engineers. Even an increase to this level will make it difficult to retain the best people, but it should help to greatly relieve the current pressure to look elsewhere and also improve morale.

This problem presents the greatest threat to building a high-quality MBA program. Failure to make progress in the solution of this problem will almost certainly keep the program from achieving excellence in the long run.

If progress cannot be made on this issue, alternative structures for housing the MBA program should be explored. This possibility will be discussed further under "Organizational Venue" in a later section of this report.

B. STUDENTS

In total, twenty-six current and former students were interviewed in an effort to gather their opinions about the program.

- 12 students had graduated & received the MBA degree;
- 1 student had finished all course work & received a diploma;
- 12 students were currently enrolled in the program;
- 1 student dropped from the program and didn't plan to return.

Faculty members teaching in the program and administrators working with the program were also interviewed. AACSB Accreditation Standard II, Admissions (see Appendix F-1) was used as a benchmark in reaching conclusions about this section of the report.

Some of the recommendations contained in this section require changes in administrative procedures, but introduce no new costs. Changing an entrenched bureaucracy can be difficult to accomplish, however, and the effort needed to implement these recommendations may be considerable and should not be underestimated.

1. ADMISSION PROCESS

a. Findings

There are several acceptance conditions which must be met in order for an applicant to gain admission to the MBA program offered by FEAS: 1) the applicant must have received a baccalaureate degree from the University of Jordan or its equivalent and have received a minimum grade of "good"; 2) the applicant must pass an English examination, the conditions of which are specified by the Accounting Department and the Business Department; 3) acceptance is competitive and is determined by grade averages in the baccalaureate program and on the English examination; and 4) the applicant must specify his or her field of specialization and acceptance is based on competition within this field. University of Jordan graduates are guaranteed 50% of the slots in the program.

These criteria are established by the Faculty of Graduate Studies, and not by FEAS. While the admissions process is currently administered by FEAS, some faculty members complained that because of the criteria, they are administered strictly by the numbers, and that no judgement can be used concerning the field of undergraduate study, the quality of the university attended, the extent and nature of the applicants experience, etc. These faculty members felt that a stronger student body could be selected if more judgement could be introduced into the selection process. The general feeling seemed to be that the criteria used in the selection of students should be under the control of those who teach them.

b. Conclusions

The standard admission screening process utilized in MBA programs in the United States

uses an index number which is computed utilizing undergraduate grade point average and the score achieved on the Graduate Management Admission Test (GMAT). This test is administered by the Educational Testing Service (ETS) in Princeton, New Jersey, and is given four times a year at locations all over the World. This index gives the highest coefficient of determination available to admissions officers to assist in making admissions decisions. The last time I looked at the ability of this coefficient of determination to predict success it was only .43. Thus the coefficient is very helpful, but certainly does not permit a high level of certainty in making admissions decisions. ETS employees are adamant in saying that admission decisions should utilize pre-established criteria, but should also use judgement in making exceptions to those criteria when logic favors doing so to pick more capable students. It can therefore be concluded that the argument made by members of the faculty to utilize judgement in the admission process has merit.

c. Recommendations

The conditions which must be met to gain admission to the MBA program are reasonable at this stage of development. They need to be administered in a more flexible fashion, however. I recommend that a small committee of faculty members from the FEAS be established to make recommendations concerning exceptions to established conditions. This requires a case-by-case review of marginal decisions before final recommendations are made. I also recommend that this committee be given an input into the establishment of conditions for the program.

2. QUALITY OF THE STUDENT BODY

a. Findings

Overall, the faculty judged the quality of the students in the MBA program to be acceptable, but not outstanding. Faculty members expressed a desire to have more students with baccalaureate degrees in engineering matriculate into the program. No strong complaints were registered over the quality of the student body, however, and the faculty members interviewed did not believe this was a serious problem.

b. Conclusions

Since the admission criteria utilized to select students for the MBA program at FEAS differs from the common criteria utilized in the United States, it is not possible to make a meaningful numerical comparison. The Project Director at FEAS equated the grade of "good" to "C+" in the United States. Most MBA programs in the United States want a GPA of 3.00 (scale of 4.0) which equates to a "B" average. If this comparison is accurate, the requirement of "C+" is slightly low but not bad for a new program still trying to build a reputation.

c. Recommendations

I do not recommend any precipitous changes in the conditions used to select the current student body for the MBA program. I believe it is desirable to ratchet-up the quality of the student body over time. As demand for the program builds, conditions for admission should be raised to keep the size of the student body within acceptable limits. An effort should be made to increase the required baccalaureate performance level to a "B" average as conditions permit.

3. LOW NUMBER OF STUDENTS GRADUATING

a. Findings

Everyone associated with the FEAS MBA program has been disappointed with the low number of graduates to date. The program is currently in its sixth year, yet fewer than twenty students have received an MBA degree from the program. Several factors appear to have contributed to this slow throughput: 1) the program suffered startup problems with staffing, course scheduling, thesis supervision, bureaucratic delays, etc. which have slowed student progress; 2) most students enrolled in the program have full-time jobs and take all of their courses in the late afternoon and evening which normally limits enrollments to two courses per semester; 3) work demands sometimes force students to drop courses; 4) students who take their baccalaureate degree in academic areas other than business are required to

take prerequisite course work which may greatly lengthen the time required for program completion; 5) family obligations sometimes interrupt or terminate programs; and 6) military obligations may interrupt or terminate programs.

b. Conclusions

It is safe to conclude that no single problem is responsible for the low throughput in the MBA program. I believe this situation will improve markedly as the FEAS reduces its startup problems. Part-time graduate students with full-time jobs always have a low graduation rate, however, because the time required to complete the program is so long that many variables can intervene in a negative fashion. While it is disappointing that a higher percentage has not yet graduated, it should also be pointed out that students who have not yet completed the program or who will not complete the program may still have learned much that will help their management performance.

c. Recommendations

I believe the very low throughput of the MBA program is a cause for concern which needs attention, although I expect it to start increasing now that the program pipeline is relatively full. Many of the student complaints and/or suggestions for improvement shown in III B 4a below should prove quite helpful in attacking this problem. I recommend that a committee of the FEAS faculty be established to review these complaints and/or suggestions and recommend program improvements to handle those items judged to have merit. I recommend that this committee be chaired by the Dean and that the Project Coordinator be included on the committee and be given a vote.

4. STUDENT SATISFACTION WITH THE MBA PROGRAM

a. Findings

Most students were quite positive about their total experience in the MBA program. The overall attitude appeared very favorable, and those who had graduated were extremely proud of their accomplishment.

Students did offer a number of complaints and/or suggestions for improvement, and these are listed below:

- * the program takes too long to complete
- * there is not enough utilization of the computer in course work
- * It is too hard to get to utilize a computer terminal
- * lectures are in English, but some faculty members require that exams be written in Arabic
- * the material is much too theoretical and often is difficult to apply
- * students who took the baccalaureate degree in business from the FEAS stated that they had some of the same faculty members in their MBA program that they had studied under in the baccalaureate program, and the books used and the material taught was identical
- * the library closes too early
- * there is too little current material in the library
- * many faculty members use textbook examinations, i.e., memorization of the textbook is all that is required
- * the program does not have enough interaction with the real world, i.e., there are not enough guest lecturers from business, field trips to look at business operations first hand, etc.
- * there is not enough focus on international business
- * some theses had to be translated to Arabic
- * not enough faculty assistance in selecting a thesis topic
- * no condensed prerequisites are offered
- * too few MBA courses are offered because of heavy undergraduate teaching
- * it takes too long to complete the thesis requirement
- * the comprehensive examinations are unrealistically hard and too high a percentage of students fail

b. Conclusions

Student complaints and/or suggestions for improvement can be very helpful to those desiring to improve a program. Some of the student comments point to needed areas of improvement where changes should be possible without incurring additional costs. Others

may be judged to be without merit. Still others may be needed but too costly to implement. It is important that these comments receive careful consideration, however, because some have the potential to cause serious damage to the program if permitted to continue over a long period of time.

c. Recommendations

I recommend that a committee of the FEAS faculty be established to review these complaints and/or suggestions and recommend program improvements to handle those items judged to have merit. I recommend that this committee be chaired by the Dean and that the Project Coordinator be included on the committee ex-officio with vote.

C. Curriculum

The AACSB Standard IV, Curriculum, states that: "The purpose of the curriculum shall be to provide for a broad education preparing the student for imaginative and responsible citizenship and leadership roles in business and society - domestic and worldwide." The Standard provides an excellent backdrop against which the curriculum of the MBA program offered by the FEAS can be evaluated.

1. COMMON BODY OF KNOWLEDGE

a. Findings

The MBA curriculum required by the FEAS does not require three areas of course coverage required by the AACSB common body of knowledge:

* an elective course, No. 24713 Production Management, is offered as a possible selection in the management specialization.

* no course appears to be offered which deals with "legal environment as it pertains to profit and/or nonprofit organizations along with ethical considerations and social and political influences as they affect such organizations"

* an elective course is offered in the management specialization which deals with integrating analysis and policy determination at the overall management level.

b. Conclusions

The MBA curriculum conforms to most of the AACSB "Common Body of Knowledge" requirements. Only in the areas of production management, legal environment, and policy analysis are the requirements not met.

c. Recommendations

Make the elective course, No. 24713 Production Management, into a requirement for all students. Current faculty members in management already teach this course, so there may be no staffing implications.

Add a required course to the curriculum in "legal environment." Seek to arrange for a faculty member from the Faculty of Law to teach the course. If this is not possible, arrange for a practicing lawyer in the business community to teach the course.

Add a required course in "Business Policy" to the curriculum for all MBA students. Current faculty members in management already teach this course, so there may be no staffing implications.

2. BREADTH REQUIREMENT

a. Findings

The MBA curriculum contains sufficient course work outside of the area of specialization to satisfy the breadth requirement.

b. Conclusions

The AACSB breadth requirement (work outside of the field of specialization) is met.

c. Recommendations

No recommendations are needed.

3. CHANGES IN PROGRAM DESIGN

Since the recommendations necessary to bring the MBA program curriculum into conformity with "common body of knowledge" requirements would add nine credit hours to the required course work, a change in program design is required to

accommodate this addition. This could be accomplished by adding nine hours to the total requirements. I do not recommend this, as I believe the time period required to complete the program is already too long. The addition of nine credits of required courses could also be accomplished by reducing the number of credits required in the area of specialization. I recommend that this be accomplished by reducing the area of specialization to nine credit hours and eliminating the thesis option. I would build the comprehensive examination into the policy course. This course should be designed to require the integration of knowledge from all business disciplines, and would provide a perfect backdrop to prepare students for the comprehensive examination. This could do much to improve the throughput problem.

I would like to be clear about the fact that I do not dislike the thesis requirement. I believe it is a perfectly acceptable option. You can only require so much work if the program is to be realistic, however, and the FEAS has already reached the limit that is acceptable in a program dealing with primarily part-time students who are full-time employees. Therefore, something has to go if the new requirements are to be added.

D. LIBRARY AND COMPUTER RESOURCES, FACILITIES, & SERVICES

Site visits provided the opportunity to tour the library and make a random check of the materials available. The Head of the Periodicals Department, University of Jordan Library, helped me perform this review. The computer laboratories utilized by the FEAS were also toured. The Acting Director of the Computer Laboratories and a Supervisor assisted in the performance of this review.

1. LIBRARY

a. Findings

The University Library at the University of Jordan is housed in a modern building which seems very adequate.

A review of the card catalog containing the book collection in the business disciplines revealed a good selection of the main books in each discipline checked.

A review of the card catalog containing the journal collection in the business disciplines revealed that many business journals are not available.

Time did not provide the opportunity to examine the services available in the library. It is not possible, therefore, to assess their adequacy. Library hours, however, are very short to provide needed service to students who study in the late afternoon and in the evening.

b. **Conclusions**

The USAID grant provision for the acquisition of book materials has made a very positive impact on the book collection. The collection is modest by U.S. standards, but I judge it to be adequate to support the mission of the FEAS and its MBA program.

The USAID grant has helped improve the journal collection in the business and accounting disciplines, but the collection is still extremely weak. A check of available journals in marketing, e.g., revealed that only five journals with marketing titles were available. This is not enough material to permit adequate research and teaching on current developments in marketing. A random review of other specializations showed general weakness in the extent of the journal collection.

Library hours are too short to provide adequate service to students in the MBA program.

c. **Recommendations**

Remaining monies in the grant for the acquisition of library materials should be utilized to strengthen the journal collection. A systematic review of the journal collection in each business and accounting discipline should be conducted and major journals not currently available should be ordered to the extent permitted by the grant.

Library hours should be lengthened to better serve students like those in the MBA

program who study in the late afternoon and in the evening. The library should be open until 10:00 p.m. on days when classes are in session. This has possible budgetary consequences, but it may be possible to accomplish this recommendation through rescheduling the utilization of staff time. Only a skeletal staff should be necessary to maintain minimum service in the evening.

2. COMPUTER LABORATORIES

a. Findings

The computer equipment purchased through the grant has been well documented in the reports prepared by IRD/Westinghouse reports, and will not be itemized here. The equipment has been installed in attractive laboratories and is receiving heavy usage, and is obviously making an impact.

The computer laboratories are closed to students when classes are not in session.

Approximately 30% of the time currently available in the computer laboratories is utilized by MBAs.

b. Conclusions

There is heavy demand for courses which train students to utilize computers in the solution of business problems. For example, instruction in DOS, Lotus 1-2-3, and SPSS is included in the courses which are available. When the seven courses offered in the present term were opened for enrollment, all seats were filled within two hours and a waiting list existed for each course. The availability of computer courses and access to the computer laboratories needs to continue to be expanded if the impact of this hardware and software is to continue to grow.

c. Recommendations

I recommend the funding of one additional staff member to replace the staff member currently in the hospital if she is unable to return. This staff member should be utilized to expand the number of computer courses offered. When the computer laboratories are not being utilized for classroom teaching, they should be open for use by students in the FEAS with priority given to students in

the MBA program. The additional staff member can also be utilized to provide the staff supervision needed to make this possible.

Efforts should be continued to train members of the faculty and staff in the utilization of available software in their MBA courses. The Acting Director stated that five professors are currently utilizing computer packages in their MBA courses, but there is still considerable room to expand software utilization.

3. TRAINING AND AUDIO-VISUAL EQUIPMENT

The training and audio-visual equipment ordered under the grant by IRD/Westinghouse has been received and is being utilized.

E. EXTERNAL RELATIONSHIPS

Interviews were conducted by the Corporate Training Specialist, Don Swanson, with ten representatives of major business firms in Jordan (See Appendix D-3). He asked a series of questions in these interviews about the MBA program offered by the FEAS, University of Jordan.

Interviews were conducted by the Business School Specialist, Richard Weeks, and the Team Leader, William Berg, with representatives of four of Jordan's major business associations (See Items 18-25 of Appendix D-1 of this report). Questions were asked about the MBA program offered by the FEAS.

1. FINDINGS

The representatives of major business firms in Jordan had no knowledge of the existence of the MBA program offered by the FEAS, University of Jordan. Since they had no knowledge of the existence of the program, they had no image of the program, either positive or negative.

Of the representatives of the major business associations, one had an employee enrolled in the program. His image of the MBA program was somewhat negative as he stated that the program was too theoretical. He stated that many faculty members have no idea about real business. The other representatives of major business associations either had no knowledge of the MBA program or only very limited knowledge. They knew of the existence of the program because of the interview which had been arranged, but could offer no specifics about the program.

2. CONCLUSIONS

The lack of knowledge of the program among representatives of major business firms and major business associations is not surprising. The program has so few graduates to date that businesses have yet to hear of its existence.

Members of the faculty of the FEAS do not actively engage in consulting activities with the business community and thus do little to spread information about the MBA program. (One of the reasons for lack of consulting is that the University requires that all consulting be done through the University Consulting Center at an hourly rate based on the professor's base salary.)

The lack of a formally assigned MBA director with released time to use for administrative duties and to promote the MBA program in the business community contributes to this problem.

3. RECOMMENDATIONS

The FEAS should appoint an MBA program director and provide him/her with the necessary released time to make active promotion of the program in the business community possible. Raising the image and the visibility of the program should be part of the director's assigned responsibility.

Establish a business advisory committee of prominent business leaders to advise the Dean and the newly appointed MBA program director. This should help raise the program's visibility in the business community and provide valuable inputs from the business community about its needs for trained managers. I would recommend that this committee have at least twenty members. Top people are very busy and a committee of twenty or more should ensure adequate attendance at business advisory committee meetings. The committee should be convened two times a year at the University.

Encourage faculty members to engage in active consulting in the business community. In the United States, consulting of up to one day a week, on average, is considered acceptable practice for business faculty members. This consultation has a dual benefit in that it helps keep faculty members aware of current business problems and also helps to reduce the pressure to relocate caused by an inadequate salary structure. This consultation would also be helpful to the business community in that it would make available a pool of highly educated and trained faculty members to assist in the solution of business problems.

Encourage faculty members to join professional organizations in their disciplines to help raise the visibility of the FEAS and its MBA program.

Establish a faculty committee to study the issue of throughput in the MBA program (See recommendation B, 3, c).. If the current slow completion rate can be accelerated, graduates of the program should do much to raise the visibility in the business community.

Invite business leaders to speak to MBA student groups.

Encourage business leaders to identify fast-track employees and sponsor their participation in the MBA program.

F. ORGANIZATIONAL VENUE

The subject of organizational venue can be addressed from two separate directions: 1) are changes desirable in the current administrative structure which houses the Accounting Department and the Business Department in the FEAS and 2) should an MBA program be established in Amman which is private and completely separate from the University of Jordan? These questions were explored during interviews conducted at the University of Jordan, and during interviews conducted with representatives of major business associations in Jordan.

i. FINDINGS

Some faculty members of the Accounting Department and the Business Department would like to see a separate faculty established to house the business disciplines. They believe this would raise the visibility of the business disciplines within the University of Jordan. It would also ensure that the Dean would have a business degree and would understand business programs (This does not necessarily have to be the case with the current structure of FEAS.). They also perceive that this would increase the autonomy of the program.

Representatives of the major business associations offered mixed opinions about the desirability of starting a separate private business school. Opinions ranged from extremely strong feelings that the only way to get an outstanding MBA program in Jordan is to start a private school using a U.S. or European regional or international model, to feelings that the MBA program should definitely stay in its current location in the FEAS, University of Jordan. Among the comments made which help to shed light on this issue were the following:

- * Our employees who are candidates for management positions all have technical degrees in fields like engineering and chemistry. After they gain sufficient practical experience we have normally sent them to the United States to get an MBA degree. Because of increasing program costs and the devaluation of the JD, this has now become prohibitively expensive. There is growing need to start a private MBA program in Jordan so we can train these people here without sending them to the U.S. The reason a private school is necessary is that we must remove bureaucratic structures so that we can pay competitive salaries. In order for a private school to be started, it is essential that the politics of the situation be handled correctly. The idea would have to have broad support in the business community, and an endorsement from the Royal Family would also be helpful.

- * I am not certain there will be enough students to support a private MBA program and the current program offered by the FEAS. For this reason, I believe the MBA program should stay where it is at the University of Jordan. Our organization would be willing to take initiative to promote the graduates of the MBA program to the business community if that would be helpful.

- * If you had asked me about starting a private MBA program five months ago, I would have jumped at the idea. A private MBA program would definitely be a better model, but in the economic situation we are now in, I doubt that the cost can be handled. The best bet is to improve the current situation by bringing in outside professors to introduce cases into the program. The current MBA program is too textbook oriented and does not provide enough real world experience. The appeal of the private model to me is that I know we have to pay competitive salaries to attract and retain faculty members. This is only possible in a private program not hindered by bureaucratic rules. I am thinking of resigning my position in Jordan and moving to Kuwait, where I can earn four times my present salary, in order to be able to afford to send my son to earn an MBA in the United States. If USAID really wants to help the Arab World, it should help the American University of Beirut move to Jordan.

- * Jordan should have an MBA program run the American way. I would be willing to participate in setting up an MBA program as a private school.

Representatives of the faculty of FEAS who were interviewed were interested in seeing a private MBA program established because they see it as the only possible way to solve the salary problem. They would desire, of course, to relocate to the private MBA program at a much higher salary.

2. CONCLUSIONS

The time on site did not permit interviews with all of those impacted by a change in the location of the Accounting Department and the Business Department within the University of Jordan. For example, I believe it would be necessary to conduct interviews with the President of the University, with members of the Economics, Political Science, and Public Administration Departments, and with faculty members teaching in the Health Services Management program to assess the potential upside and downside impacts of such a move.

Intuitively, there is little question in my mind that the business administration programs would benefit from such a move, but I am uncertain about the impact on the other programs. I would expect that from my conversations with business managers in Jordan there would be more than sufficient demand for business programs in Jordan to make the establishment of a Faculty of Business Administration economically feasible and desirable.

While several interviews were conducted among representatives of business associations in Jordan to get some feeling for the level of interest in establishing a private MBA program, the extent of these interviews did not permit a clear conclusion to be drawn.

3. RECOMMENDATIONS

I recommend that the Dean appoint a committee of faculty with representatives from the areas that would be impacted by a new venue for business administration and accounting programs. This committee should be charged with interviewing all faculty members and administrators in the departments located in the FEAS, and with making a recommendation to the Dean concerning disposition of this matter. If the recommendation supports the establishment of a separate Faculty of Business Administration, the Dean should forward it to the President for final disposition.

I recommend that USAID fund a feasibility study to carefully research the feasibility of establishing a private MBA program in Jordan. This study should explore, inter alia, the:

- * extent of support for this concept in the private business community,

- * willingness of members of the business community to provide endowment for this program,
- * willingness of members of the private business community to sponsor employees to enter the program and assist them financially while progressing toward the degree,
- * regional demand for this program from other parts of the Arab World, and
- * willingness by a member of the Royal Family to provide endorsement for this concept.

The study should deal with the issues of financing the program, the size of the faculty to be recruited, the anticipated student enrollment, the name to be carried by the program, the physical location of the program, the cost of the classrooms and offices to support the program, the equipment which would be needed for the program, and the cost of providing library facilities to support the program.

I am very fearful that the salary issue will not be solved by the administration of the University of Jordan. Failure to solve this problem will cause serious recruitment and retention problems in the Business Administration and Accounting Departments. These problems will almost certainly prevent the MBA program offered by the FEAS from reaching the high level of excellence which is needed by the business community.

If the salary issue is not solved, and if the results of the feasibility study favor the establishment of a private MBA program, I recommend that USAID provide support for the establishment of a private MBA program. It seems clear to me that the future of Jordan is highly dependent on the quality of leadership in its private business sector. This sector, in my opinion, is the sector most critical to Jordan's economic stability and growth. The rationale for USAID to support such an effort is therefore quite obvious. I believe this program should be started as a new private MBA program, and that the MBA program offered by the FEAS should continue to exist and receive support. There is no question in my mind that the two will be sufficiently different, and that the demand for the two programs will be more than sufficient to justify their separate existence.

ADDITIONAL COMMENT

Recent changes in AID procedures have made it very difficult to send professors to the United States for further studies.

Effective December 1988, there were some changes in training rates. Technical training of 5 months or longer at

academic institutions continue to be paid at the academic rate for the institution concerned---between about \$650 and \$850 per month. At non-academic locations the maintenance rate varies from \$985 for standard cities up to a maximum of \$1201 for certain high cost cities.

This makes it prohibitive for sabbaticals abroad. Any senior person who has to maintain a separate domicile in order to take a sabbatical abroad would find this completely prohibitive.

I recommend that AID consider changing its procedures to provide \$1,000 per month for faculty members to study abroad up to one year while on sabbatical leave. If system-wide considerations make this undesirable, I recommend that a way be found to make a special exception for faculty members in the FEAS so that it will be possible for selected faculty members to continue to spend their sabbatical leaves studying abroad. Continual faculty upgrading is needed if the MBA program is to continue to improve..

STATEMENT OF WORK QUESTIONS
AS RELATED TO THE MBA PROGRAM

The findings, conclusions, and recommendations reported in the previous sections of this report have addressed most of the relevant questions posed in the Statement of Work. The answers to other questions can be inferred from the findings and conclusions presented and the recommendations made. The following narrative is offered in an effort to cover the issues which have not been covered directly in previous sections.

1. To what extent have Jordanian business management practices been affected by the FEAS portion of this project ?

Jordanian business practices have been minimally affected by the MBA program or more specifically, by the MBA portion of the project. The impact of an MBA program is felt in the business community from its graduates and from the research and consultation work of the faculty. There have been too few graduates, and all of those who have graduated have done so quite recently, for much impact to be observable. As noted in the report, no research has been done and little or no consultations have been made. Therefore, thus far in the project there has been very few business practices changed or affected by the MBA portion of the project.

2. To what extent is FEAS capable of ensuring that their programs address the areas of greatest demand/need ?

Very little has been done by faculty members of FEAS to determine what the specific-Jordan management needs/demands are. The assumption has been that the courses/programs of foreign countries (i.e. U.S.A.) would fit here in Jordan. This is a big and questionable assumption. It is felt by some of the faculty members that the MBA program is training students for general competence in overall management, so there is little need for FEAS to determine the areas of specialization which have the greatest demand/need. The most effective way for a program like the MBA to be relevant is by having an active faculty doing research and providing consultations to the business community. This is what makes the teaching not only more relevant to Jordan, but it answers the demand/need question.

3. What reasons have prevented individuals and businesses from more extensive use of FEAS programs ?

Individuals and businesses have not made more extensive use of the FEAS MBA program because there is a very low level of awareness of this program in the business community.

Recommendations have been made to help correct this situation.

4. What evidence is there that the institutional capacity of FEAS has been improved as a result of this project ?

The institutional capacity of the FEAS has been improved by this project in a number of ways. The most visible evidence can be seen in the current level of utilization of the computer hardware and software. The library holdings in business books and periodicals have been improved, audio-visual equipment availability has been enhanced, and faculty and staff members have been trained and upgraded. Where there are areas of faculty weakness in the business specializations offered, FEAS faculty members have supplemented it by the recruitment of external faculty members on a visiting basis. This has satisfied the immediate need, but has only forestalled the expansion of the institutional capacity. Most of the project activities have proceeded quite successfully. In those areas which have been disappointing, recommendations have been made to try to improve the situation.

5. Does FEAS currently meet accreditation standards established by AACSB ? In what areas deficient ?

The MBA program offered by the FEAS fails to meet AACSB accreditation standards on a number of dimensions. Recommendations for correcting these deficiencies have been included in previous sections of this report.

6. To what extent have the professors funded under various AID contracts been successful in developing the skills of the FEAS students ?

The only professor or trainer who was present at the FEAS during my visit was Dr. David Loy, and he chose to abstain from offering evaluative comments about the program. I interviewed some students who have studied under the visiting professors (Dr. B. Curtis Hamm and Dr. Loy). I have also reviewed their reports. I can infer from the information gathered in this manner that the skills of FEAS students have been developed in a satisfactory manner. Some staff training in computing has resulted from the grant, and some staff assistance in support of research activities is currently being provided by the computer laboratory's staff.

7. To what extent have AID funded training in the U.S. contributed to improvements in the curriculum/teaching methods ?

Those faculty members that received training in the U.S. under the AID grant spoke very highly of the training they received and felt that their teaching methods have been favorably effected. However, since many faculty members at the FEAS have spent considerable amount of time in U.S. universities that was not necessarily a part of this project, it is quite difficult to sort out the actual impact of the AID grant on the curriculum except in the area of computing. The impact in this area has been quite positive and is continuing to grow. The curriculum is in need of some minor modifications, but by and large is in satisfactory shape.

8. Is there sufficient demand for the MBA program to cover program costs?

Tuition revenues from the MBA program cover only a small percentage of the program cost. There is sufficient demand for the program to fill its openings, but program costs will never be covered without a radical change in tuition charges at the University of Jordan.

9. Should AID continue to work with FEAS as a vehicle to improve business management practices ?

If the "salaries" of the faculty members at FEAS cannot match the salaries of their peers in other faculties, the motivation toward excellence is substantially impaired. However, if this "salary problem" is solved, there is absolutely no question that AID should continue to work with FEAS. There have been some disappointments, but the overall need for this program is extremely large. The potential for significant contribution to an improved and expanded pool of available management talent makes continued support worthwhile.

HEALTH SERVICES MANAGEMENT PROGRAM

FACULTY OF ECONOMICS AND ADMINISTRATIVE SCIENCES

UNIVERSITY OF JORDAN

RICHARD F. SOUTHBY, Ph.D., F.H.A.
Professor and Chairman
and
Professor of Health Care Sciences
The George Washington University

MANAGEMENT DEVELOPMENT PROJECT EVALUATION

HEALTH SERVICES MANAGEMENT

I. INTRODUCTION

The objective of this component is to conduct a mid-term evaluation of the Master of Health Services Management degree program within the Faculty of Economics and Administrative Sciences at the University of Jordan in Amman, Jordan.

In conducting this review, attention has been given to the specific questions included in the Statement of Work. (Appendix A). It will be possible to determine what mid-term corrections can and should be made to enhance the probability that the original project goal and purpose will be met. Consideration will also be given to the question of USAID/Amman providing additional resources for health services management education at the University of Jordan.

The evaluation of the Health Services Management Program has comprised two groups of activities:

- (i) Review of materials provided by AID and the University (see Appendix E-2)
- (ii) Personal interviews with the persons listed in Appendix D-2.

II. OBJECTIVE

The original objective of the Health Services Management portion of this project was "to institutionalize an education/training process and to transfer the necessary technology to improve the quality and increase the quantity of professionally competent Jordanian health managers."

The principal inputs of the project included technical assistance, participant training, training aids, and research grants.

The expected outputs included: students graduated from a Master's Degree in Health Services Management; staff upgraded and/or trained; curricula upgraded and developed; research projects undertaken; and training aids installed.

III. MASTER PROGRAM IN HEALTH SERVICES MANAGEMENT

A. ABOUT THE PROGRAM

The Health Services Management Program was established to prepare manpower for the administration of health services in Jordan and neighboring countries. This program was established in 1984 with USAID support and in consultation with the World Health Organization. It offers a graduate course leading to the Master's Degree in Health Services Management. It is designed to prepare qualified individuals who seek careers as administrators of health services.

Students may choose to specialize in one of the following fields:

- a. Public Health Administration
- b. Hospital & Health Facilities Administration
- c. Health Economics and Finance

There are two tracks in each specialty: the first includes study of core courses (12 hours), specialty courses (15 hours) and writing a thesis (9 hours). The second track includes study of core courses (12 hours), specialty courses (24 hours) and sitting for a comprehensive written examination based upon the material which the student has studied during the program.

A contract between the Faculty of Economics and Administrative Sciences (FEAS) and the Institute for Resource Development, Inc., (IRD/Westinghouse) was signed on June 26, 1986. The contract calls for IRD/Westinghouse to provide visiting faculty members to FEAS, procure audio-visual, library and computer commodities, and sponsor PhD candidates and professorial research/training sabbaticals in the U.S.A.

B. FACULTY

1. FINDINGS

At the present time there are two faculty members, Dr. Wadie Kamel, Visiting Professor and Coordinator, Health Services Management Program, and Mr. Matthew Yee, Lecturer. In addition, there are two people completing doctoral studies in the United States. It is anticipated that one will return in late 1989 and the second in 1990 to take up positions as full-time Assistant Professors of Health Services Management.

On February 1, 1987, Dr. Wadie Kamel, who was then serving as Professor of Health Services Administration, began being funded from the IRD/Westinghouse contract. It was expected that Dr. Kamel would then remain in this position for two years.

While some of the courses are taught by members of the Faculties of Medicine and Engineering and FEAS, Dr. Kamel and Mr. Yee are often single-handedly taking on the bulk of the teaching load and the full counseling load of the program. Both persons are unanimously given high marks by the students for their knowledge, teaching ability, and helpfulness.

Since the two Jordanian faculty members have not yet returned from the United States, it is too early to assess the impact of AID funded training in the United States on the contributions to improvement in curriculum / teaching methods. This should be more apparent after the Jordanian faculty members return from the United States.

Matthew Yee is an American citizen living in Jordan with his Jordanian wife. He has been contracted by the University as a lecturer in the Health Services Management program. Since he shares with Dr. Kamel a heavy load of teaching, if, for any reason, Mr. Yee were to depart, the remaining load of teaching would be untenable and could jeopardize the progress made so far in this program. His salary is so small that the potential that he might leave is always a possibility.

2. CONCLUSIONS

The institutional capacity of the health services management program within the Faculty of Economics and Administrative Sciences has clearly been improved as a result of this project. In fact, it is doubtful that such a program would even have been initiated without the support that this AID grant provides. Although the capacity has been improved, it is still insufficient to be a viable graduate program in health services management without further expansion.

The faculty members (2) have been clearly successful in developing the skills of the health services management students. However, with only two faculty members, the potential variety, depth, and breadth of the program becomes quite problematic. In fact, unlike the other two programs in this project (MBA and JIM) the whole program is conditioned upon the AID funded professor. This is potentially dangerous and steps must be taken to not lose what has already been gained. The crucial time will be when the two faculty members return from the United States. They may be unfamiliar with what has occurred during their absence and will need an experienced guiding hand to ease them into the leadership of the program.

3. RECOMMENDATIONS

A senior, appropriately qualified and experienced academic should be appointed to replace Dr. Wadie Kamel when his

contract expires. This appointment should be at the Full Professor level. Since the program has depended almost entirely on Dr. Kamel, his early departure could negatively affect the progress made thus far. It would therefore, be appropriate for Dr. Kamel to remain as an advisor to the new appointee for a period of twelve months. Dr. Kamel should not be expected to teach during this period, but to counsel and assist the returning faculty in both teaching and administering the program.

For similar reasons, the retention of Mr. Matthew Yee in the program would help to stabilize the program during the crucial time when the faculty members return from the U.S. Should for some reason he depart, the vacancy would place a heavy strain on the newly returned faculty members. Therefore, for insurance that this might not happen, Mr. Matthew Yee should be funded by AID for a period of two years. This would more than likely assure another degree of continued stability in the teaching process.

C. STUDENTS

1. FINDINGS

All of the students who were interviewed indicated that they had learned a great deal from their course work. Some students indicated that they had problems in relating the theories and materials in the American textbooks to practical applications in Jordan. Dr. Kamel does make a serious effort to apply the theoretical knowledge to local conditions.

The graduate program in health services management has thus far been successful in producing a significant output of graduates over a relatively short period of time.

Of the 57 students enrolled thus far:

- a. Average age is 29
- b. There were 40 males and 17 females.
- c. Thirty four from Private Enterprise
- d. Twenty-three from Government
- e. There were 7 drop outs.
- f. Twenty-eight have graduated.
- g. Twenty-four were physicians prior to the course
- h. Seven were registered nurses prior to course.
- i. Eleven were Administrators before the course.
- j. Thirty-six were full time students and 21 were part-time.
- k. Of the 28 graduates, 23 were placed in a related field (i.e. Administrator of a Health Service).

2. CONCLUSIONS

For a program which has only been in existence for four years, the Health Services Management Program has been successful in producing a significant number of graduates. This has been achieved with very limited faculty resources and support personnel. Hopefully this will be further improved when the Jordanian faculty members return from postgraduate studies in the United States.

The percentage of graduates placed as Administrators of Health Services is high, reflecting an impressive degree of relevancy of courses and a recognized need for this program.

3. RECOMMENDATIONS

As faculty resources are increased, classes should be scheduled at times which would be more convenient for part-time students. This will enable more students to participate in graduate professional education while remaining in full-time or part-time employment. However, it should be recognized that an increase in the number of part-time students will negatively effect the throughput.

D. MEASURED STANDARDS

To evaluate a program such as the Health Service Management Program, one should compare it to some "standard". The standard used here is from the Accrediting Commission on Education for Health Services Administration in the United States. These standards are listed in Appendix F-2a through F-2h.

1. FINDINGS

Listed below are the criteria in which this program was found to be deficient.

CRITERIA

"Id. It is expected that if the Program is located in a specialized graduate school (i.e. FEAS) within the University, the school shall be accredited by the appropriate recognized specialized accrediting agency."

FINDING

As a policy, neither the Accrediting Commission on Education for Health Services Administration nor the Accrediting Commission for Business Administration are willing to confer accreditation outside of the United States of America.

CRITERIA

"IIa. The academic resources of the University shall be sufficiently broad to support a master's degree Program --and sufficient access to these resources."

FINDING

The program has not been in effect long enough to demonstrate this support or lack of it.

CRITERIA

"IVc. The following content areas shall be addressed in the curriculum. The study of:

1. Relevant aspects of the social-behavioral disciplines.
2. Individual, social, and environmental determinants of health, disease, and disability.
3. Elements of personal health services systems.
4. Management and of administrative skills and their application to health services organizations.
5. Required field work consistent with the Program objectives."

FINDING

The curriculum design was made available to the evaluator. All of the above elements were included, but, as to be expected from such a young program, it was felt that each element needed substantial strengthening.

Comments were made by the students regarding the unorganized manner and lack of importance placed on the experiential portion of the program.

The program is very supportive of the incorporation of microcomputer technology into the Health Services Management Program. It has already been included in the Advanced Health Finance and Materials Course taught by Mr. Yee.

CRITERIA

"Va. There shall be a sufficient number of full time faculty, academically and professionally qualified for the teaching obligations of the Program."

Vb. Each Program shall have a minimum of two full-time faculty members, who hold professorial appointments (assistant, associate, or full professor)."

FINDING

There are presently two full-time faculty members in the program (Dr. Kamel and Mr. Yee). However, they are not permanent staff members. Two Jordanian faculty members will

be returning soon and hopefully will qualify for this criteria.

CRITERIA

"Vd. The organization of the program and its relationship to larger academic units shall be conducive to scholarly and academic productivity --- including sufficient authority to meet the needs of the Program and receive appropriate recognition for this responsibility"

FINDING

The Health Services Management Program is located within the Faculty of Economics and Administrative Sciences and does not have departmental status.

CRITERIA

"VII. There shall be evidence of faculty activity directed toward development of new knowledge relevant to health services administration. There shall also be evidence of policies providing appropriate time and other support for faculty research activities."

FINDING

Due to the teaching overload of the two faculty members, little or no organized research is taking place, or in fact, possible.

2. CONCLUSIONS

While it is not the intention of this evaluation to recommend the impossible -- that is, accreditation by the ACEHSA -- it is intended that this report compare the Health Services Management Program in FEAS with a known standard -- ACEHSA.

The following are the areas in which the Health Services Management is deficient and should be addressed by the university in its efforts to continuously upgrade this program.

- * Availability of broad academic resources and administrative practices within the university.
- * Demonstrated stability and continuity of adequate support provided to the program by the university.
- * Upgrading of some content areas of the curriculum.
- * Lack of permanent full-time faculty members.

* Lack of departmental status.

* Lack of research in health services management.

There is impressive potential for this graduate program in health services management. If this program were to meet these standards of accreditation, and were to receive careful nurturing and strong, cooperative leadership, it could become a major educational resource in the region.

3. RECOMMENDATIONS

Greater attention needs to be placed on research in health services management. New faculty members should be recruited on the basis of their research potential as well as their teaching abilities. Opportunities for health services research should be exploited in collaboration with the National Medical Institute, the Ministries, and the private sector.

The experiential learning component of the program should be organized better and be more rigorous in its demands of the students. The students' performance should be carefully evaluated by a Preceptor within the health facility and a faculty member.

A careful review of the academic program in health services management should be conducted by the health services faculty and two other faculty members appointed by the Dean. This review committee should identify the areas where changes are needed in order to meet the criteria set up by the Accrediting Commission on Education for Health Services Administration within the next three years.

E. IMPACT & EXTERNAL RELATIONSHIPS

1. FINDINGS

There is wide support for this program among the health services community and especially among the employers of its graduates. Everyone interviewed was well aware of the Health Services Management Program and indicated that there is a clear demand for this program and its expansion and development.

Professionally educated graduates have been introduced into the health services administration field. Until now the field has depended on physician directors and "on-the-job" trained administrators, both of whom have lacked formal education in management.

The AID-funded visiting professor is highly active in the community of health services. He is on numerous health

committees and thus extends the knowledge of this graduate program among the medical field in Jordan.

There has not been a careful assessment of the need or potential demand for the numerous categories of health services administrators in Jordan, either by the university faculty or government officials.

2. CONCLUSIONS

Jordanian health services management practices have been positively affected by the establishment of the program at the University of Jordan.

All of the interviewees saw the impact of the graduate program very positively and are supportive of its continued development.

In discussions with officers from four different hospitals and from the National Medical Institute and the Ministry of Health, it was made clear that there is sufficient demand for at least the next ten years for graduate trained health services managers to more than utilize the graduates of the program. This statement does not diminish the significance of the need for manpower research and planning required beyond these next ten years. Unless the production of health services is planned in a logical manner, one can foresee an outcome where there will be a serious imbalance in supply, demand, and distribution of these important categories of health manpower in the future.

Without the resources from AID it is unlikely that the University would be willing to provide the necessary funds for the continuation of the health services management program. Within five years the program should have gathered even broader support and recognition from its users - National Medical Institute, the Ministry of Health, the Ministry of Planning, and the Private Hospitals - so that it will be able to continue without AID funding.

3. RECOMMENDATIONS

USAID should continue to work with FEAS and the Health Services Management Program to ensure the sustained growth and development of these activities.

An Advisory Committee to the health services management program should be created to provide relevant input to the faculty on the desirable developments and changes in the graduate program. Membership could be drawn from the following groups :

- * National Medical Institute
- * Private Hospitals
- * USAID/Amman

- * Ministry of Health
- * Ministry of Planning
- * Association of University Programs in Health Administration.

This Committee should meet at least annually, but as often as deemed necessary, to review progress and offer advice to the program.

In conjunction with this Advisory Committee the program should also initiate the creation of an independent professional association, similar to the American College of Healthcare Executives, to be responsible for the professional development of health services managers in Jordan.

In addition, the University, the National Medical Institute, the Ministry of Planning, the Ministry of Health, and the Private Hospitals should collaborate in a major health manpower research project, possibly funded by AID, to determine the educational needs and demand for all categories of health services management in the near and far future.

I also recommend that AID/Washington establish a Cooperative Agreement with the Association of University Programs in Health Administration, (Appendix G), to disseminate information and support services on health services administration and health services management education to the University of Jordan: This would assist the university in developing its health services management program into a major educational resource for the region.

F. ORGANIZATIONAL VENUE

The Statement of Work for this evaluation asks the evaluation team to explore: (1) "What organizational changes should be made at FEAS to improve the relevancy of their programs to the needs of Jordanian businesses?" and (2) "Should a separate faculty of business be created at the University?" While these two questions do not ask about the Health Services Management Program, obviously it would be affected.

1. FINDINGS

Presently the Health Services Management Program is within the FEAS and does not have departmental status.

The physical facilities provided the faculty is left wanting. The program has no regularly assigned classrooms and must often "look" for classroom space they might use.

2. CONCLUSIONS

The Faculty of Economics and Administrative Sciences within the University of Jordan is the most logical venue for the continued operation and future expansion of the Health Services Management Program, with support from AID. For this to be effective, however, there should be some structural changes within the health program and the faculty.

3. RECOMMENDATIONS

The health services management program should evolve into a Department within the FEAS. This would be appropriate and feasible to do at the time the Jordanian faculty members return to the university.

There also needs to be a strong chairman of the new Department who will be able to work with the other Department Chairmen to provide graduate students with the required educational experiences necessary for a first class program in health services management.

In addition, the university might consider the use of joint faculty appointments for faculty members who teach in FEAS and other parts of the university. Joint appointments signify commitment and support by faculty members throughout the university community and do not require additional financial resources. An alternative organizational arrangement does not appear to offer any significant advantages at this stage.

It is also important that the Master's Program in Health Services Management becomes more fully developed before serious consideration is given to the establishment of any new academic programs as this would lead to the dilution of already scarce academic resources.

The university should declare its firm commitment to graduate education in health services management by implementing the program recommendations stated above.

JORDAN INSTITUTE OF MANAGEMENT

DONALD A. SWANSON, Ph.D.
Corporate Training Specialist
Development Associates, Inc.

JORDAN INSTITUTE OF MANAGEMENT

The Jordan Institute of Management (JIM) is a separate component of the Management Development Project (AID No. 278-0261) and is assessed in this section of the mid-term evaluation.

I. INTRODUCTION

A. BACKGROUND

The Jordan Institute of Management (JIM) was founded in 1979 as a department of the Industrial Development Bank (IDB) for the purpose of providing training for managers and staff of Jordanian businesses. In 1981 the Government of Jordan requested technical assistance to help JIM bolster its program. In 1984 USAID/Jordan conducted a feasibility study and a Project Paper outlining the kinds and types of assistance that could be provided to JIM. On September 18, 1984, USAID/Jordan and the Government of Jordan signed a grant agreement for the Management Development Project.

The Grant Agreement has been extended with the Government of Jordan to December 31, 1991.

The Institute for Resource Development (IRD) of Westinghouse Electric Company was awarded a host country contract with JIM in February 1987 for a period of three years until January 31, 1990.

B. METHODOLOGY

This mid-term evaluation was conducted February 1-24, 1989 by Development Associates under an IQC for USAID/Jordan. In-depth interviews were conducted with JIM staff and USAID/Jordan officers to ascertain information about the JIM program. Other key informants were interviewed to obtain assessments of JIM's effectiveness and impact. Ten Jordanian JIM client businesses were selected in a stratified random sample based on the magnitude of institutions trained by JIM. We interviewed the principal training officer or personnel director in each business as well as 32 JIM participants from those organizations. A good balance was made between those attending Westinghouse-directed training programs and those trained by JIM staff. See Appendix D-3 for a complete listing of persons interviewed. Relevant JIM documents, training curriculum, IRD reports, and USAID/Jordan reports were also reviewed.

This mid-term evaluation assesses twelve principal questions addressed by USAID/Jordan in its statement of work for this evaluation (Appendix A). The questions have been transformed into program components and issues and re-organized around two central themes: 1) JIM's training program under the grant agreement; and 2) JIM's institutional capability and sustainability for the future.

II. STATEMENT OF OBJECTIVE

The general grant agreement objective for JIM is:

Institutionalize an education/training process and in transferring the necessary technology to improve the quality and increase the quantity of professionally competent Jordanian business managers available in general and specialized skill areas.

Specific objectives for the JIM grant are:

1. Assist JIM in upgrading its current curriculum and expanding it to include new subjects such as computer science.
2. Introduce and institutionalize within JIM new teaching methodologies in a broad range of subject areas including accounting and finance, management, marketing, industrial production, and computer sciences. Methodologies will incorporate the use of computer hardware and software relevant to Jordan's business requirements and the use of audio visual aids and library materials.
3. Provide JIM staff with training in the U.S. and third countries.

III. ACTIVITIES/OUTPUTS

A. SERVICE DELIVERY

The following service delivery activities and outputs are to be accomplished within the grant agreement:

1. JIM is to train 3,400 participants during a five year period.
2. JIM is to introduce 10 new courses per year and to upgrade its curriculum of existing training courses.
3. JIM is to establish a library for participants and staff. It is to establish a computer laboratory for training and for the JIM institution. Training aids such as audiovisual equipment and other training aids are to be used in training.

B. WESTINGHOUSE IRD TECHNICAL ASSISTANCE

IRD is to provide technical assistance and commodities as follows:

1. Provide short-term technical advisors to JIM to conduct new courses for JIM.
2. Provide the planning and placement of JIM staff in short-term training courses in the U.S. and third countries.
3. Procure computer equipment, library materials, and training aids on behalf of JIM.

C. FUNDING/EXPENDITURES

The Westinghouse IRD host country contract is for \$1,075,000 through January 31, 1990. Another \$600,000 in grant funds is earmarked for JIM and is administered by USAID/Jordan. Those funds have been used for additional contracts, special training courses, and evaluations.

IV. TRAINING PROGRAM

This section provides assessment of findings, conclusions, and corrective actions and alternative possibility recommendations of JIM's training program.

A. SHORT-TERM TRAINING

Under the Grant Agreement six of the proposed nine JIM staff members have received short-term training in the United States through January 31, 1989 (see Appendix H for participant training details.)

1. Findings

JIM and IRD have completed 48 of the scheduled 235 person-weeks of short-term training as of February 1989.

The short term training provided to date is as follows:

Lutfi Al Khawaja: April 20-July 3, 1987

Computer Basics, Lotus, Data Base III Plus, Computer Application.

Washington DC, Richmond, Chicago, San Francisco, Atlanta, Orlando.

Sameh Abu-Laban: August 6-October 3, 1987

Management, Marketing, Computer-Assisted Management, Leadership and Decision-making.

New York City, San Francisco, Washington DC, St. Paul/Minneapolis, Massachusetts, Atlanta, Houston,

Ali El Kuz: August 28- October 17, 1987

Advanced Computer Programming, Data Communications. Washington DC, Atlanta, New York City, Boston, San Francisco, Portland.

Adel Dawood: September 12-October 17, 1987

Marketing, Leadership for Supervisors, Internship. Washington DC, Chicago, St. Paul, Clemson.

Kamal Ismail: October 12-December 11, 1987

Finance, Computer-Assisted Decision Making, Computer Applications.

Washington DC, Richmond, Chicago, San Francisco, Atlanta, Orlando.

Muhammad Malallah: January 4-February 12, 1988

Management, executive decision making.

Phoenix, IRD headquarters, Charlottesville, Virginia.

Formal JIM participant evaluations are generally positive concerning course content, course structure, and general course organizations. There is positive assessment of almost all aspects related to course administration.

Participants wrote critical assessments on course duration, applicability for Jordan, and in a few cases the level of courses matching the participants skill level. In most cases participants believed that the individual courses were too short and covered the materials too quickly. There were critical evaluations that the materials presented were for American audiences with American case studies and application and that they would be difficult to apply in Jordan. In a couple of cases the JIM participants were not prepared for the high level courses and in another couple of computer courses the JIM participants were over-skilled for the course. But, in general, their evaluations are positive.

IRD states in several quarterly reports that they were hampered in their programming by the strict dates required by JIM for programming. IRD had to program training in a small window of exact dates imposed by JIM for the participants between course loads at JIM. This meant that they programmed several concurrent training programs in different city locations.

JIM administration believes that the short-term training was too intensive in some two or three day programs. They feel that training impact was lessened by moving about from site to site and having short two or three day training. They recommend that future participant training be concentrated in one or two places rather than four or five locations.

JIM participants report that participant training was geared more toward personal development than toward institutional development of JIM. Their opinion is that they took courses aimed at their personal enhancement rather than aiming at the application of these courses toward future course development at JIM. IRD coincides with this perception in their quarterly reports and correspondence with JIM regarding participant training. There were no requirements made of the participants to implement actions upon return to Jordan.

Participants recommend unanimously that short-term training be more carefully planned between JIM and IRD to include the following:

1. A training needs assessment with very specific skills that are required by participants.
2. Participants take full courses of one or two weeks in one or two locations rather than shorter courses.
3. Participants attend U.S. training with the obligation to adapt, translate to Arabic, and implement those same courses at JIM.

Comparing short-term training in the U.S. with on-the-job training by IRD in Jordan, JIM trainers make the following observations:

1. U.S. training is more rewarding personally because it exposes them to different teaching methodologies, different training materials, and different course designs. On-the-job training only exposes them to a few different course designs and with similar teaching methodologies.
2. On-the-job training provides more intensive dialogue between IRD advisors and JIM trainers and therefore course designs and implementation are much more thorough and are indeed implemented at JIM.

Regarding short-term impact on curriculum/teaching methods, JIM trainers assess that they have taken some curriculum designs from their short-term training but not nearly as much as they would have expected. The reasons stated are because the courses were too short and they had little time to interact with the professors. Also, they felt no obligation to design courses from

the training they received. Regarding teaching methodologies, they place major credit for reformed training methodologies on the influence of witnessing and experiencing their short-term training experience. All JIM trainers reported significant changes in their training styles based on the short-term training.

Their conclusion is that both short-term training and on-the-job training ought to be continued as they complement each other.

2. Conclusions

Participant training has been performed adequately by the contractors provided by IRD and IRD has performed adequately given the tight windows required by JIM. Short duration courses in many locations is less satisfactory than longer and more intensive training in one or two locations. Concentration has been made on personal development of JIM staff rather than institutional development and this clearly requires a shift in 1989 and beyond.

Short-term training has good impact for teaching methodologies and can be useful for exposure to different curriculum designs. It has had less impact on designing new courses because this was not perceived as a requirement. On-the-job training in Jordan has been much more effective for having impact on course design and development. This balance could change given the corrective actions proposed herein.

3. Recommendations

- JIM and IRD should plan jointly longer and more sustained short-term training in one or two training sites. JIM trainers should take a maximum of two short-term courses during a month training in the United States.
- Future participant training should be geared specifically for institutional development. Training courses should be selected in which JIM professors can take a course and apply it immediately to a new or upgraded training course at JIM. An expected outcome should be for each JIM trainer to design two new courses upon return to Jordan.
- Recognizing that this is difficult and expensive, Internships should be emphasized as was done at the University of Clemson as they provide more interaction with the American instructors and lead to more direct course outputs.

4. Alternative Possibilities

- The insertion of JIM professors in regularly scheduled training programs in the U.S. is not the only viable practice of providing short-term training. JIM and IRD could explore longer term involvement with internships such as was conducted with Clemson University internship.
- Specially designed courses can be planned for several Jordanian JIM professors at the same time. This has had excellent results in other USAID-funded projects. Participant training costs can be cut considerably also. However, with so few number of JIM trainers, this may not be practical. For example, the JIM trainers can go to Colombia, Maryland and receive a good deal of their specially- designed training there with internships in the area. Training specialists could provide some of the training courses at IRD.
- JIM and IRD could explore short-term training in other areas assessed as being critical for JIM institutional capability. A few examples are training in writing case studies, marketing promotion, strategic planning, and designing training programs.

B. TRAINING COURSES AND CURRICULUM DEVELOPMENT

JIM has provided training to 3,374 participants for the period 1985-88 and is well ahead of the 3,400 target levels for a five-year period. In 1988 JIM provided 65 courses and is expected to provide 74 training courses in 1989.

1. Findings

JIM provides middle-level technical training in five areas of management, accounting/finance, production management, marketing, and computer science (see Appendix I for training course information.) According to JIM records, training courses are provided to persons with the following background: 47% administrative, 37% financial, 9% production, 4% marketing, and 3% other. Thirty percent of the courses are given to financial institutions, 24% to government, 23% to industrial, 8% to commercial, 8% to transport, and 7% to others. A majority (56%) of participants have BA degrees, 17% have technical diplomas, 17% have high school degrees, 5% have MA's, 1% have Ph.D., and 2% are below high school level education.

JIM participants are at the middle-level and lower middle-level managerial and support staff level. According to JIM, they do not provide training for the top-level executives, general managers, CEO's, nor the top department heads. According to several people interviewed, JIM has made its reputation for being a middle-level manager training institution.

JIM states that 50 Jordanian companies represent 80% of their participants. Another 250 Jordanian companies have had participants trained at JIM representing the other 20% of their participants. JIM has trained 5,408 participants in the last ten years. This means that in those 50 companies an average of 86 course offerings have been attended from each company or approximately 8 training slots filled per year per company. Of the remaining 250 companies each one has filled less than one-half a training slot per year.

To determine the potential training market in Jordan is difficult due to the unknown number of managers and potential managers in the 300 companies mentioned. Add to this the list of 76 course offerings of JIM (1989 - see Appendix I-6 to I-8) that possibly any or all managers could attend, the potential is exhaustive.

Training courses have a duration of one week (25 hours) to four weeks (100 hours). The 1988 distribution of courses was as follows:

COURSE	NUMBER	PARTICIPANTS
Management	18	269
Production Management	4	69
Marketing	12	156
Accounting/Finance	25	374
Computer Science	6	82
TOTAL	65	950

It should be noted that many computer courses are combined with accounting/finance and management. The planned schedule for 1989 has about the same proportion of course offerings as 1989.

Westinghouse IRD introduced six new courses in 1987. The plan implemented was for IRD to develop the courses completely and conduct the courses with a JIM staff member as assistant professor. In 1988, the IRD professor and the JIM staff trainer conducted the same course jointly in order to transfer the technology of giving this new course. In 1989, the JIM staff trainer is to conduct the same course with observation/assistance from IRD in some courses. Courses conducted to date are as follows:

<u>Date</u>	<u>Course</u>	<u>Participants</u>
<u>1987</u>		
July 11-16	Computer Application for Managers	11
July 18-30	Management Information Systems	19
Sept. 5-17	International Marketing Strategies	14
Sept. 19-Oct. 1	Corporate Financial Planning	24
Nov. 7-12	Data Communications and Networks	24
Nov. 21-Dec. 3	Productivity Measurement and Improvement	19

1988

Feb. 1-7	Computer Appreciation for Managers	10
Feb. 8-14	Computer Appreciation for Managers	11
Mar. 28-Apr. 3	Data Communications and Networks	14
Aug. 8-26	Management Information Systems	15
Aug. 15-28	International Marketing Strategies	8
Sept. 24-Oct. 6	Productivity Measurement and Improvement	17
Nov. 19-Dec. 1	Corporate Financial Planning	14

The same courses were presented as planned. The JIM assessment is that these courses were of high caliber. JIM staff trainers state that IRD provided excellent technology transfer and well-designed courses. JIM staff trainers stated that they were capable of presenting the same materials in 1988 and agreed that they can handle the courses themselves in 1989.

In assessing the course curriculums, they were found to be of high standards with a good balance of reading materials, class lectures, case studies, and problem-solving. Almost all case studies are from the United States. The majority of reading materials are also from U.S. journals and reproductions from American literature. This was one of the few critical assessments made by both JIM staff trainers and Jordanian participants.

Participant evaluations rate five of the six courses very high in course content, presentation, and new information and skills provided. According to participant course evaluations the overall range for all courses is 7.4 to 9.4 on a ten point scale. The Data Communications and Networks course received the lowest rating in both 1987 and 1988. Participants interviewed taking this course stated that it was too basic, planned poorly, and the visiting IRD professors did not handle the materials well.

Other critical assessments by participants interviewed were:

- Some courses were deemed too theoretical and not related to specific Jordanian business problems.
- Training materials used were foreign case studies and foreign reading materials.
- Problem-solving was emphasized at the middle manager level but some participants stated that they could not put into practice some of their training.

This last assessment is a critical finding of this evaluation. JIM trains middle-level managers in decision-making, problem solving, and management, but some of the participants state

their inability to put these new skills and information into practice. These persons express blockage from the top-level executives to implement the training skills learned. Because of this, these participants expressed high frustration at their inability to implement changes in their institutions.

JIM's introduction of computer facilities opened up new opportunities for new courses and also for upgrading other course offerings to include computer-based training in management, accounting, finance, and marketing. According to JIM staff, the computer facility has made a significant difference in their course offering and their capability to provide up-to-date courses. Nine new computer courses have been offered since 1987.

JIM has requested new procurement in 1989 that would bolster their training programs. They state a need to have additional computer equipment and offset equipment to produce training materials.

2. Conclusions

JIM training courses are of a good caliber for middle-level managers. The variety of courses is well-balanced and JIM maintains a high degree of success in providing solid courses. However, the participants are not able to put into practice some new skills learned because of their perceived blockages of change from their high-level executives in their organizations.

The introduction of computers has made a positive contribution to JIM. It gives them the opportunity to offer new courses as well as upgrade existing courses with computer-based training.

3. Recommendations

- JIM should start immediately to develop about 25-50 Jordanian case studies with grant funds that can be incorporated into its management, production, and marketing courses to alleviate the dearth of cases for the Middle East and in Arabic.
- JIM should explore ways to involve high executives in the planning of the training of their middle managers so that training skills learned can be implemented into their institutions.
- USAID/Jordan, JIM, and IRD should decide about new procurement requests for 1989.

4. Alternative Possibilities

- JIM could explore marketing possibilities to reach a greater share of the potential training participants. A

first priority is to reach the high-level executives by providing executive seminars for two day seminars at hours convenient to these executives. Most likely these seminars would be in the afternoons, evenings, and weekends when top-level executives could attend such events. They could be made attractive by bringing in expatriate and well-known international figures.

- JIM could explore expanding its computer program for lower-level line staff for the Jordan business community. They could expand considerably their offerings of basic level computer courses in word processing, data base systems, accounting, and computer-based financial analysis for these new markets.

However, it is of the opinion at JIM that they have reached a certain professional level which they are not willing to go below. Expansion, in their opinion, should be either horizontal through promoting JIM's progress to a larger number of organizations in and out of Jordan, or vertical through approaching higher managerial levels.

- JIM should make sure that its guest lecturers follow JIM's teaching methodology strategies. Some participants detected discrepancies between JIM trainers case study and problem solving methodology versus some more traditional training lectures provided by guest speakers and contract trainers.

C. TRAINING DEMANDS AND NEEDS

The JIM training program is to address the areas of greatest demands and needs of the Jordanian businesses.

1. Findings

JIM conducts informal meetings and intuitive needs assessments with the Jordanian business community. It does not conduct formal surveys nor training needs assessments.

In almost all cases JIM states that it does not conduct pre-course surveys to determine participants needs. It generally does not do, for example, a skills inventory, a knowledge/information test, nor a job attitude survey. Most courses combine participants from various companies and therefore these assessments are made by the JIM professors informally during the first few hours of the course.

JIM provides an evaluation sheet at the end of training to ascertain participants training satisfaction with content and its applicability for their jobs. JIM staff and administration personnel also review training relevancy for the participants jobs. They pinpoint how the training will be applied and how the training might affect their future work.

JIM staff report some formal mechanisms used for follow-up three months or six months after training. JIM's relationship with the Industrial Development Bank (IDB) is assessed to be helpful as IDB maintains close relationships with the major Jordanian businesses.

JIM trainers manifested only peripheral relationships with Jordanian businesses. They stressed their desire to maintain closer contact with those companies but they admit they are not doing so.

Based on their informal surveys, JIM is presently deciding to offer some new courses in Effective Delegation, Strategic Planning, Decision Making with Computers, Production Management with Computers, and Basics of Industrial Management. Some of these courses may be offered in 1989.

Both JIM and participants interviewed reiterated their frustrations that there is a large training gap not filled at the top management positions. They expressed that until this training gap is filled the present training will have less impact on the business practices of the Jordanian companies.

2. Conclusions

There are some formal mechanisms by JIM to ensure that their training programs address the areas of greatest demands and needs. Also, their assessment is they have a good "feeling" for the training market. This is most likely true in that there is high quality training and high degree of participant satisfaction. There is some indication that JIM modifies its training offerings based on the evaluations they do conduct.

By JIM's own admission they can improve greatly in maintaining more systematic relationships with the Jordanian businesses. They require better follow-up to assure that their training fits more perfectly the businesses needs.

3. Recommendations

- o JIM should establish immediately several mechanisms for ensuring follow-up with their JIM training graduates in the many Jordanian businesses.
- o JIM should conduct at least informal needs/demands surveys with formal feedback mechanisms for the JIM organization.
- o For all new planned courses, JIM should conduct more formal training needs assessments, detecting specific knowledge, skills, and attitudes that will be addressed in training.

4. Alternative Possibilities

- JIM could explore conducting a more formal training needs assessment of the entire Jordanian business community. More likely, it might approach ILO of the United Nations to ascertain their interest and congruence in conducting such a survey. If this were to take place it most likely should be done in collaboration with the Amman Chamber of Commerce, Chamber of Industry, and the IDB.
- JIM could assess more closely their long term prospect of continuing to train middle-level managers and employees but that the training might not be addressing some significant problems in Jordanian business practices.
- The consultant detected a whole series of new course ideas while conducting the surveys with Jordanian businesses. Some suggestions are offered here:
 - JIM could follow-up each informal meeting with a letter addressing any specific project ideas with the Jordanian business firms. For example, the Central Bank would welcome a training of trainers seminar for its trainers. This is also most likely true for the Jordan Electric Authority and the Royal Jordanian Airlines.
 - JIM should explore more intensively in-house training for individual Jordan firms. JIM would write proposals for training based on their discussions with the firms. For example, the Cairo Amman Bank most likely will contract JIM for an intensive two week Computer-based accounting course for 15-20 employees to be held at the Cairo Amman Bank.

D. TRAINING EFFECTIVENESS

The JIM training staff, with IRD technical assistance, is to provide training under the AID grant assistance that will develop knowledge/information, skills, and appropriate new practices that will enhance the Jordanian business community. At another level, IRD is to train trainers at JIM to carry out effective training.

1. Findings

JIM commends IRD for its solid technical assistance in preparing the six new courses and for transferring technology to JIM. There is positive assessment of IRD's work in preparing the

courses thoroughly and preparing JIM trainers alongside them in conducting the courses. The strategy of jointly conducting the courses in 1987 and 1988 was viewed positively by JIM.

JIM states positive statements that IRD has transferred training skills to JIM staff. This is evidenced by JIM's capability of conducting the courses on their own. They have also been able to use the IRD-provided training materials and case studies.

JIM course evaluations attest to the very high levels of training skill transfer provided by JIM. The evaluations cover four areas of program content, instructional staff, administration, and overall evaluation of the training program. In summary evaluation forms reviewed, all evaluations were over 80% positive and some as high as 95% positive evaluation. The highest scores were for the Computer Appreciation for Managers, Management Information Systems, and Productivity Measurements and Improvement. The lowest rating was for the Data Communications of Networks that dipped to a lower rating in 1987 but improved somewhat in 1988.

In general, these evaluation ratings are very high.

2. Conclusion

At both levels of IRD technical assistance, training JIM participants and JIM staff, there is ample evidence that skills training is of high quality. Nevertheless, IRD has provided minimal technical assistance in the larger issues facing JIM concerning the viability of the institution in its present status and the seemingly entrenched nature that their training is only reaching a certain middle-level manager in the Jordanian companies. In fairness to IRD, this was not in their host country contract.

3. Recommendations

- o To maximize IRD technical assistance, it is recommended that IRD shift its emphasis in 1989 toward more direct overall technical assistance for the entire JIM training program. They should not only look into introducing a new course in 1989, but rather systematically explore with JIM other technical assistance efforts. These would include 1) in-house specialized courses for individual Jordanian business firms; 2) executive-level seminars; 3) more computer-based accounting, finance, management training; and 4) development of basic computer courses offerings.

4. Alternative Possibilities

- o In the last year of IRD's host country contract, it would be prudent to explore how they might be more helpful to JIM in addressing some larger institutional

issues facing that institution. Their involvement could be modified somewhat to assist in strategic planning, marketing, and ways in which JIM can become sustainable over the long run.

E. TRAINING IMPACT

The project grant goal is to achieve better management practices and the availability of more managers with both general and specific skills. This is the end result of the training activities.

1. Findings

JIM has conducted informal surveys and follow-up to a limited degree and believes that Jordanian businesses are taking some actions on the training received. They are somewhat cautious of this conclusion because they recognize that top-level Jordanian managers do not attend JIM training courses and since the Jordanian business culture is such that there is minimal delegation of authority and trustworthiness to delegate authority they may be varying limitations on the ability of the trainee to implement changes.

Nevertheless, all JIM trainers express confidence that they are making impact on knowledge/information transfer, attitude change, and most importantly practice changes at the middle management level. They provided some good examples that Jordanian companies have made changes based on training in cash flow accounts, accounting systems, salary scale systems, business plan changes and implementation, marketing strategies, and setting up computer-based financial systems. All of these examples demonstrate some fairly good evidence by JIM of their capability of making impact changes.

Jordanian business participants give some favorable credit to JIM for having made some improvements in their business practices. In interviews, they manifested some positive results that they felt resulted from JIM training. Some examples they provided in interviews were a revamping of their salary scale system, establishment of a quality control program, a marketing strategy in an insurance company, investment analysis techniques used in an investment bank, and the ability to conduct risk analysis.

Several companies visited have their own technical training programs and give JIM credit for having influenced them in setting up those programs along the lines of JIM. They stated that they were influenced by JIM course designs, teaching methodologies, materials, and course content. These several companies normally use JIM for courses that they themselves do not offer.

The evaluation assessed impact on three levels: 1) new information/knowledge; 2) skill attainment; and 3) putting training into practice. The knowledge/information impact was reported in almost all interviews to be positive. JIM was assessed to be providing good and new information. Secondly, new skills were learned well and participants give JIM favorable ratings for skill attainment. Thirdly, putting this training into practice dips down considerably for the before mentioned reasons of blockage and entrenchment at the top levels.

2. Conclusion

Overall, JIM has made an impressive training impact at the knowledge/information and skill attainment level of its participants. It is one of the reasons why companies continue to return to them for training. They have a good reputation for providing skills for the participants that the companies state they want and need.

While a modest number of changes were mentioned, it is not possible in this evaluation to measure accurately practice changes in the Jordanian businesses. Sometimes these practice changes take time over several years. The participants themselves are quite optimistic about their own personal development but some are more skeptical about their affecting changes in their companies.

3. Recommendations

- JIM should make a concerted effort to measure the extent of the impact and skill transfer they make on the participants.

4. Alternative Possibilities

None.

F. TRAINING LIMITATION ISSUES

The research question is: "what are the reasons that have prevented individuals and businesses from more extensive use of JIM programs?" The project grant is to increase the quantity and quality of JIM courses and thus, attract more participants.

1. Findings

Jordanian business firms interviewed manifested a strong and continued effort to train their staff. From other sources, we found that Jordan, in general, has a high respect for education and training. There appears to be also a major boom in the 1980's for Jordanian businesses to upgrade and modernize their firms. They seem to realize that they ought to become more competitive, especially in the international arena. Jordanian firms with no international contacts and business might be more reluctant to see the need for upgrading of their staff.

By mid-February 1989, a majority of the Jordanian business firms interviewed had already made their training plans for 1989. This demonstrated their keen interest in planning ahead for this year. In most cases these firms looked to JIM to satisfy some of their training needs. They are especially interested in getting management, accounting, finance, and computer instruction from JIM. They stated that they have a set training budget for each year and that JIM gets from 10-30% of their business.

Jordanian businesses would be more amenable to JIM training under the following conditions:

- Specialized courses for individual firms
- Flexible hours and expanded course offerings
- More training related directly to their needs. This means less theory and more in-office applicability.

Firms reported looking for specialized training, for example, to set-up a specific personnel filing system. They are almost requesting individualized organizational development efforts combined with technical training as the response to the OD effort.

According to JIM records and JIM staff interviews, both the introduction of new courses with IRD assistance as well as the new computer training center has opened up JIM to becoming a more attractive and viable training institution. The six new courses as well as the 12 new computer courses have attracted new and different company participants. At the same time, according to JIM staff, computer-based programs in accounting, finance, marketing, and management information systems have made JIM competitive in the Jordan management training field. They maintain that a majority of their course offerings have computer-based instruction integrated into their curriculum.

There seems to be a wide divergence within JIM on the matter of responding to individual requests. The evaluator was told that JIM does not consider themselves a consulting firm and they believe it quite difficult to respond to individual requests. Their preference is to continue adapting their courses to a wider variety of firm needs. On the other hand, it was pointed out by the administration of JIM that they respond to individual requests and initiate contacts with concerned organizations to design specialized programs for them. It was added that during the last ten years JIM conducted 64 in-house programs which represents 20% of total programs.

Present course costs were not mentioned as a serious hindrance. Only two of ten firms interviewed thought the course costs were

too high; five thought they were about right; and three considered JIM costs low in comparison to other comparable training with other institutions. TEAM - Cairo charges about three times the prices of JIM.

Participants interviewed clearly indicated preferring course offerings during working hours Saturday-Thursday. Almost all of the participants said they would not be overjoyed with taking courses in the afternoons, evenings, or on the weekend. This means that JIM's window is narrowed somewhat to offering training during office work hours.

The current economic recession and devalued dinar is not a barrier for offering training programs. No Jordanian business firms interviewed reported cutting back on their training programs during the past three or four years. A few have increased the number of employees receiving training.

2. Conclusion

Jordanian businesses have a reasonable positive attitude toward training. All businesses interviewed had already made their training plans for the year and they had included JIM in their training plans. They cannot be expected to increase enrollments under the present conditions. Increased JIM marketing could expand their training opportunities with the business community.

3. Recommendations

- JIM should implement more aggressive marketing strategies to build on the positive training climate among the Jordanian business community. They should attempt to devise new marketing strategies to capture more of the set training budgets of those companies.

4. Alternative Possibilities

- While 18% of JIM's progress were offered in the afternoons (which are not office hours) during 1988, JIM could explore expanding even further the opening of its training facilities for the afternoon, evenings, and weekends to attempt to capture more of the training market.
- JIM could explore a "Scholarship Program" for individual participants and firm employees. AID funds could be used to subsidize certain course offerings; especially for individuals and small business firms. This system has worked very well in several Latin American training programs sponsored by AID.

V. JORDAN INSTITUTE OF MANAGEMENT INSTITUTIONAL ISSUES

This section provides findings, conclusions, and recommendations regarding six JIM institutional issues outlined in the Scope of Work. It concentrates on six questions posed by USAID/Jordan.

A. INSTITUTIONAL CAPABILITY IMPROVEMENT

The program grant is to bolster the JIM institutional capability to fulfill the project purpose of institutionalizing the education/training process.

1. Findings

The grant agreement is limited to creating some new courses, upgrading some existing JIM courses, assisting in developing a computer center, and providing training aids and library books. Participant training was an input to support these four principal activities. IRD technical assistance was designed to be short-term consulting for some new course development but not necessarily for institution-building. There is no long term advisor from IRD to perform any role of institution-building. JIM and IRD have a host country contract with very specific tasks to be performed and of a somewhat limited nature.

JIM, with IRD assistance, created in 1987 and 1988 six new courses provided through technical assistance given by IRD. According to JIM administration, IRD's intervention greatly improved JIM's capability to develop new courses. JIM adds that those six new courses would have been virtually impossible to develop on their own. IRD provided full development of those courses with training materials, course design, and case studies. Additionally, JIM gives IRD credit for training JIM trainers in teaching methodologies.

JIM credits the short-term training in the United States for the impetus for developing another 12 management and marketing courses as well as the 12 new computer science courses. They state that their institution has gained prestige by merely being associated with IRD and because, as they put it, JIM had the foresight to obtain outside assistance and thus gain higher levels toward training excellence. They maintain that JIM is looked up to now as a more complete training institution.

JIM places considerable emphasis on their institutional capability in computer science. They place strong emphasis on their ability to draw new students because of the computer center. In 1988 JIM provided 12 new computer courses with 156 new participants. Since 1987, JIM has introduced and re-designed most of their courses to include computer-based learning. They consider this a major achievement.

There has been a substantial increase of library materials and training aids. JIM credits IRD positively for having selected excellent resource materials and training aids.

Business officials interviewed consider that JIM has made good progress in the past two years in offering new courses and upgrading existing courses. They recognize that JIM is gaining some regional recognition.

Jordan has recently witnessed an economic recession with the dinar being devaluated. As a result, it is reported that Jordan businesses are becoming more conservative, and thus, less risk taking. This would ordinarily create and that there normally would be much more resistance to taking on training programs for the companies. Nevertheless, JIM continues to offer a variety of courses attractive to Jordan businesses and enrollments have remained steady during the economic recession.

The grant agreement does not deal with other equally important JIM institutional building aspects such as conducting needs assessments, marketing of course offerings, and institutional financial arrangements. IRD institutional-building responsibilities and obligations are likewise limited to certain elements of JIM.

JIM has not fulfilled the grant agreement in contracting five new trainers. JIM administration admits their inability to finance contracting new trainers now. Their position is to request USAID/Jordan to finance two new trainers for an interim period of two years until time when JIM could make sure these trainers were able to conduct courses. The IDB states that it cannot and will not finance any new JIM trainers until JIM starts to become financially viable.

2. Conclusion

There is little doubt that JIM has performed well since January 1987 in developing new courses and upgrading existing courses. Its balanced and professional program is well-established. The computer center is in place and functioning well. Participant training has been effective in providing JIM with trainers with new training methodologies and course ideas. Therefore, on the training side JIM has demonstrated good institutional capability improvement.

Nevertheless JIM faces some tough institutional decisions in 1989 that are not addressed in the grant agreement. These include establishing a market strategy, dealing with its deficit, and establishing a long range strategic plan. While JIM has reduced its deficit, it needs to continually stress not operating at a loss to IDB.

Regarding additional trainers, it is judgmental question whether USAID/Jordan should fund additional trainers. This consultant believes that JIM should demonstrate more concerted marketing efforts to cut business losses before getting into more debt. Additional funding for staff personnel is not warranted at this time and provides a wrong signal of increasing potential debt over the long run.

3. Recommendations

- JIM should establish a long range strategic plan that includes a pragmatic market strategy.
- JIM and IRD should promptly discuss a work plan for 1989 that encompasses other ways that IRD can assist in making more direct assistance towards JIM's institutional building.

4. Alternative Possibilities

- Although the grant agreement is being fulfilled properly, there are certainly other activities that could be accomplished to utilize grant funds in a most effective manner. This would require modifying the present grant agreement activities. For example, the one or two new courses planned for 1989 should go forward as planned but that appears to be all that is needed right now. IRD does not need to provide any more backstopping for the six new courses already developed as they are functioning well now and do not require outside assistance. Participant training needs to be re-structured, modified, and in some cases reduced.
- As stated elsewhere in this report, participant training needs to be geared towards having specific course development outputs coming out of this participant training.
- A careful review could be made to determine new computer-based training software that could be purchased so that new courses can be developed.
- Based on some of the findings of this evaluation as well as project review by the parties, it is possible to re-structure the existing pool of funds in joint discussions with JIM, IRD, and USAID/Jordan. The three parties could make a concerted effort to assure that remaining grant funds are used judiciously. JIM's recommendation to extend IRD's contract for one more year and to include other technical assistance activities would be acceptable and helpful to JIM.
- The IRD proposal for an additional add-on contract for technical assistance in strategic planning, market analysis, and human resource management falls directly in line with many of the recommendations of this evaluation. While it is perhaps too elaborate and too costly a proposition, it could be scaled down and still be under the existing contract. The recommendation is that those concepts be implemented within the existing IRD contract.

B. TRAINING DEMAND TO COVER PROGRAM COSTS

The project grant is geared to providing JIM with the increased institutional viability to increase training demands which will in turn cover program costs.

1. Findings

A couple of interrelated issues are explored in this finding.

JIM has fixed training costs and administrative support that requires it to charge JD 3.550 per participant hour, or roughly US\$ 6.60 per participant hour at the present official exchange rate of JD.538 = US 1. A normal 40 hour course therefore costs about \$264 per participant. This is considered reasonable by most companies, but expensive by a few of the participating companies officials that were interviewed. Yet, the participant fees and other revenues still left JIM with deficit of about US\$100,000 in 1988. This difference had to be absorbed by its parent organization, IDB.

In JIM's strategic planning for 1989 it intends to maintain the fee per participant hour at JD 3.55 and raise it JD 3.75 in 1990 and JD 4.0 in 1991. Its plan is to charge international participants slightly higher at JD 4.75 in 1989, JD 5.00 in 1990, and JD 5.25 in 1991.

Development Associates conducted a revenue and budget study in July 1988 and made three major recommendations:

- Increase the number of trainees per seminar
- Increase the price per training hour
- Increase the number of hours of training per trainer

Regarding the first recommendation, in 1988 JIM had 950 participants in 65 courses or an average of 14.6 participants per course. By raising the number of participants per course to 20 participants, 5.4 additional participants, JIM could increase revenues by JD 49,790 in 1989.

The second recommendation of increasing price per training hour has already been implemented and further price increases do not seem feasible to JIM at this time. Jordanian businesses expressed some concern at increasing fees in 1989.

Increasing the number of hours of training per trainer was quite feasible and attractive to JIM administration and the JIM trainers. At present the four principal trainers have about 550 platform hours, representing roughly 33% of their annual work time. By having each trainer conduct one more course per year with 50 hours, with 20 participants, JIM could generate another JD 14,200 in 1989.

JIM assesses that it is reaching perhaps 25% of the potential training market in Amman. Jim trainers state that there are no known market surveys of training needs or market potential for training in Jordan. They conclude that they can provide better marketing that could reach other potential markets. They are also trying to recruit participants from the Gulf States.

2. Conclusion

JIM is making progress in enrolling 950 participants with 65 different courses in 1988 at what is considered to be increased tuition costs. They are to be commended for their present marketing strategy to obtain this level in a depressed Jordan economy and with Jordanian companies restricting operations and becoming less risk taking.

JIM can also make a few revisions and unobtrusive changes that could alleviate their present budget deficit. Increasing numbers of participants per course and adding a few additional courses with the present trainers would reduce considerably their present budget deficit.

3. Recommendations

- JIM should have a target to increase the number of participants per course to 20.
- Each trainer should increase the number of courses he/she teaches by one course in 1989 that would attract at least 20 participants.
- JIM should begin a market strategy to implement the above two corrective actions. This includes providing more so-called in-house training for specific institutions, increasing public sector training, personal visits to businesses, and other energetic marketing strategies.

4. Alternative Possibilities

There are a host of alternative possibilities that JIM could initiate in a market/promotion strategy. The following are just a few that this consultant will mention and that could be explored and developed by JIM and IRD.

- JIM could offer top-level executive seminars for the estimated 2,000 CEO's, general managers, presidents, department chiefs that currently do not attend JIM courses. These seminars need to be attractive and dynamic and provided at convenient times in afternoons, evenings, and weekends for busy executives. They would include prestigious professors, lecturers, and excellent training materials. In many ways, JIM staff

may play a coordinating and organizing role in some seminars. Seminar themes need to be market-tested and discussed with the leading company managers. They could be coordinated with the IDB, Amman Chamber of Commerce, and Amman Chamber of Industry. Some potential seminar topics are as follows: Strategic Planning for the Modern Executive; Marketing Strategies for the Arab Region; Pursuit of Excellence in the 1990s.

- JIM can capitalize on its excellent computer center, by offering additional basic and beginning computer courses in the afternoons and evenings. These course offerings can be in Use of Dos; Beginning Data Base III Plus; Lotus 1,2,3; Word Processing in English; Word Processing in Arabic; and many others. Trainers can be contracted for these courses.
- JIM can begin to approach their client companies to offer more intensive in-house training. They could start with organizational development consultations and then assist in conducting training needs assessments. After designing a training strategy, they could solicit contracts for long term training with these many businesses. JIM would contract-out for trainers to conduct the training courses.

C. JIM SUSTAINABILITY

The issue is whether JIM is a sustainable institution worthy of continued grant assistance to improve business management practices. Also, to what degree could USAID/Jordan support alternative institutions or assist in establishing other institutions?

1. Findings

In 1979, JIM had 165 participants. This number has steadily grown to 950 participants in 1988. It has also increased the number and variety of course offerings each year from 10 in 1979 to 65 in 1988 and a planned 74 courses in 1989. Participants and company officials interviewed made positive statements that JIM is a consistent, responsible, and reliable training institution.

JIM professional staff has over 40 years combined management training experience. JIM trainers are recognized for their serious endeavors. Participant evaluations are consistently positive with high ratings.

According to JIM staff, the grant assistance to date has provided JIM an opportunity to bolster its on-going programs, initiate new programs, strengthen curriculums, and introduce computer training into existing and new courses. From their point of view, this has made them a viable institution.

On the other hand, JIM has only four principal trainers. JIM administration is concerned that their output will lessen with the resignation of one or more trainers. They have only a limited few contract trainers that can be called upon to offer courses. These come from the Faculty of Economic and Administrative Sciences, University of Jordan, and private businesses.

JIM has limited itself to training primarily middle-level administrative and financial company employees, representing 84% of their participants since 1979. This means that there are several other potential markets not being tapped. About 50% of the principal 50 Jordanian companies have their own technical training units (e.g., Royal Jordanian Airlines, Jordan Electric Authority, Central Bank, Jordan Potash, and Jordan Petroleum Co.) They utilize JIM for training that they cannot handle themselves such as management, marketing, accounting/finance, production, and computer science.

The provision of training of personnel that support managers appears to be untapped in the Jordanian businesses. JIM estimates at least another 10,000 employees who could benefit from a variety of management training. Jordanian businesses emphasized the need for support staff training, especially in computer sciences, accounting and finance, and word processing.

Regarding other training institutions, there are an estimated 15-20 training institutions that provide support staff training in Amman. They conduct short-term training in computer use, secretarial, basic accounting, English, and other such courses. Participants interviewed stated that JIM provided more professional training than these organizations.

The Jordan Institute for Public Administration (JIPA) provides management training for public sector employees. Several participants interviewed who had attended JIPA training also thought both institutions were about equal in quality training.

At the top-level, the principal JIM competitor is Team-Cairo. They are beginning to approach the Jordan market with top level executive seminars. In 1988 they held 20 executive seminars with about 300 participants. Another 56 Jordanian businessmen attended their executive seminars in Cairo and other Middle East countries. According to a few participants interviewed, JIM provides the same quality training as TEAM-Cairo.

Other JIM competitors are the University of Jordan and University of Yarmouk courses provided by faculty members. JIM is considered more professional by the Jordanian business officials interviewed. However, professors from both universities are lecturers and contract trainers at JIM.

JIM's new Manufacturing and Marketing Improvement Section (MMIS) is a full scope management consulting unit that provides marketing and manufacturing consulting to Jordanian businesses. At this point MMIS has not been merged well with the training division.

2. Conclusion

JIM has made considerable progress in the past two years in becoming a viable institution to provide first class business management training. It requires a major effort to alleviate its budget deficit issue and requires more qualified trainers. This second issue can be attacked by recruiting contract trainers. Perhaps most importantly, it requires a serious market strategy developed and implemented in 1989. USAID/Jordan should definitely continue its support of JIM through the PACD December 31, 1991.

USAID/Jordan support of other alternative middle level private business management training institutions is not prudent at this time. It would be detrimental to USAID/Jordan's and JIM's best interest to support another middle level training institution.

On the other hand, though not examined in this evaluation, it could be possible to provide technical assistance to JIPA. It is our understanding that they provide good public sector management training.

3. Recommendations

- A top priority is for JIM to establish a marketing strategy immediately to attract more participants in different and varied courses and to increase enrollments.
- JIM needs to coordinate the training division and MMIS thoroughly so that all JIM staff members can support both sections.

D. JIM ORGANIZATIONAL STRUCTURE AND CHANGES

The evaluation issue is to what extent certain JIM organizational structural changes are required to improve their program relevancy to Jordanian businesses needs.

1. Findings

JIM's relationship to IDB is viewed by JIM staff and Jordanian businesses as positive. Jordanian businessmen interviewed recognized the necessity that JIM continue to be associated with IDB. In their opinion, this makes JIM a most viable institution.

According to JIM's administration their prime issue is the critical need of a core of well-trained trainers. The administration recommends upgrading their present trainers through more on-the-job training and short-term training in the United States. They also state their need to contract new qualified trainers. Their objective is to have two new trainers by the end of 1989.

The JIM trainers interviewed feel the number of trainers is adequate to the number of courses and that present trainers could be complemented by contracting qualified trainers for specific courses. Under this arrangement, qualified trainers would be contracted on an as-needed-basis. IDB coincides with this view because it does not want to hire full time more JIM trainers. The resolution of this issue is important in strategic planning in 1989.

JIM's second issue relates to marketing. JIM recognizes an urgent need to market better their training program with the Jordanian businesses. They maintain their need is for a complete marketing strategy. At present no one person is in charge of marketing within the institution. JIM's administration and trainers assess that their critical need is to re-organize themselves.

2. Conclusions

Regarding the first issue, trainers, JIM needs to have on hand qualified and experienced trainers. This can be accomplished by contracting trainers for specific courses. By contracting-out, JIM is able to offer a wider variety of course offerings as new needs develop and are beyond the specialty areas of their present trainers. For example, in the interviews about 20 different kinds of training courses were identified by the Jordanian businesses. Some training needs identified were social psychology and business, personal relations between middle-level managers and top-level executives, advanced computer programming in marketing, inventory control, business law in Jordan, shipping procedures for export, writing contracts, etc. These specialized course offerings can best be handled by experts in those specific courses.

Regarding marketing, JIM has not practiced what it preaches; namely, a systemic approach to marketing their product. They are

only running at perhaps 50% of their full potential marketing capacity. Marketing is done through sending out brochures in direct mailings and some mass media advertising. (The interesting observation is that with these two market strategies alone they are able to attract 950 participants in 65 courses in 1988.) By re-organizing themselves with a marketing unit, JIM should be able to increase enrollments and offer new courses.

3. Recommendations

- JIM should contract-out trainers for specialized courses. They should not hire new training staff until they are assured that new trainers would be able to generate enough revenue to cover themselves now.
- JIM should set-up a marketing unit through re-organization that is devoted exclusively to marketing JIM training courses.

4. Alternative Possibilities

- JIM could learn well from a couple of well-established training institutions this consultant has worked with in the past and is presently affiliated. Those training institutions have a full-service and integrated approach to training that includes research and investigation, business analysis and journal writing, business consulting, case study preparations, and writing of new training materials. The institutions are at the cutting edge of producing excellent business journals, business news and ideas, policy dialogue, and research. These combined efforts have enabled them to be sought out for training and consulting services.
- The grant agreement could be modified to include contracting out for case study preparation and Jordanian business analysis. A goal could be to prepare 25-50 Jordanian case studies in Arabic in the areas of marketing, management, and production over the next three years. JIM could supervise these case studies that could be carried out by JIM trainers, FEAS professors, and business managers at \$1,000-\$2,000 each.

E. JIM PERSONNEL COMPENSATION

The issue here is to what extent JIM personnel compensation systems should be changed to ensure attraction and retention of qualified personnel.

1. Findings

JIM is a division of the Industrial Development Bank and therefore staff salaries are in line with IDB policies and regulations. In addition to salaries, IDB provides social

security, a thrift plan, staff insurance, and medical care that are part of their fringe benefit package. Job security appears to be safe. Salary levels of JIM staff are reportedly commensurate with the market levels in Amman. JIM trainers stated that their salaries at IDB are above the level they could receive at a national bank in positions of financial analysts or market analysts. They are also much higher than their colleagues at the University of Jordan.

According to JIM administration it would be virtually impossible to change the current compensation system without separating away from the IDB. There is no interest by anyone in JIM to become independent from IDB.

Present compensation levels are attracting well-qualified personnel at all levels at JIM. This includes the Acting Director to the support staff level. JIM trainers are well-qualified and well-trained and we received no indication whatsoever that they had intentions to leave the organization.

There is keen interest by JIM trainers to receive additional assignments after hours in fulfilling additional course training, writing case studies, and doing business research. It would have to be explored to see if IDB were favorably disposed to such a plan.

2. Conclusions

The present JIM compensation system appears to be satisfactory. Qualified personnel are being retained and there is no indication that this will change in the future.

3. Recommendations

None.

4. Alternative Possibilities

In those instances that JIM trainers clearly conduct seminars outside of the normal business day, trainers should get paid additional money for the additional work.

VI. OVERALL CONCLUSIONS

Jordan Institute of Management (JIM) has taken some important steps in using the grant agreement to strengthen its organization and to make it a viable institution. Since 1985 it has taken advantage of the grant to strengthen its professional trainers by obtaining good short-term training in the United States. Using good IRD technical assistance, JIM has initiated six new courses following a model prescribed in the Project Paper and the Grant Agreement. Other JIM courses have been upgraded with new training materials and training aids. JIM's new computer center is set-up in a most professional fashion and has respect in the Jordanian business community.

There is solid evidence that JIM training is of high calibre and perhaps one of the top two or three training institutions in Jordan. There is equally strong evidence that JIM training is being used by participants in their institutions, demonstrating fairly positive impacts in those businesses. This generally favorable report is impeded only slightly by some fairly strong entrenched top-level executives who do not take full advantage of innovative training of their middle-level managers.

Westinghouse IRD's technical assistance model appears to work well. Their advisors get favorable reviews from both JIM and the participants. There is good evidence that their new courses have been integrated into the JIM curriculum. Their placement of library materials and training aids is adequate. The decisions of establishing a computer center and their appropriate procurement are first rate.

JIM's most salient issues relate to their need to do some serious strategic planning about the future. Their present budget situation is unacceptable and requires some new revisions. They need to re-organize themselves to become more marketable with new courses, new clients, and new strategies. They could also raise their present good training performance even higher with more systemic training needs assessments, better quality training materials, pragmatic and experiential training, and follow-up.

VII. OVERALL RECOMMENDATIONS

Several overall recommendations for JIM emerge from this assessment and are presented as overall recommendations. Specific corrective actions and alternative possibilities were presented in individual sections.

A. NEW TRAINING OFFERINGS

JIM should make a concerted effort to reach new executive level markets with high level seminars, conferences, and policy dialogue. These training offerings will reach the top level decision-makers in Jordanian businesses and can be offered to top level public sector officials. JIM can make a significant contribution to the many business issues facing the nation in the late 1980's and early 1990's. In all instances JIM will set the agendas and provide the planning, coordination, and analysis required to conduct such events. In some instances JIM staff members will lead discussion groups while in other instances it will coordinate top level speakers and analysts under the JIM/IDB auspices.

JIM should also consider becoming active in promoting more basic training in computers, accounting and finance, and other basic management level training offerings. This will fill a vacant gap in Jordanian business management skills for the country:

B. STRATEGIC PLANNING

JIM needs to take some bold steps and perhaps leaps of faith to become a more integrated and uplifted management training organization. The steps required are better integration of the entire organization with its training and MMIS sections; increased levels of research, analysis, and case studies of the Jordanian economy and business milieu; increased preparation, development, and implementation of its training offerings; upgrading of its trainers to staff professionals; and turning its computer center into the best possible training center in Jordan. It can take the MMIS challenge to Jordanian business executives inwardly by challenging itself to the pursuit of excellence.

APPENDIX A

SCOPE OF WORK EVALUATION OF MANAGEMENT DEVELOPMENT PROJECT

I. ACTIVITY TO BE EVALUATED

The Contractor shall be responsible for evaluating the Management Development Project which involves the establishment and/or upgrading of the following management programs in Jordan: Master in Business Administration at the University of Jordan, Faculty of Economics and Administrative Sciences (FEAS); Master in Health Services Administration at FEAS; short term training activities at the Jordan Institute of Management (JIM).

II. PURPOSE OF THE EVALUATION

The primary purpose of this evaluation is to recommend:

1. What, if any, mid-course corrections can and should be made to enhance the probability that the original project goal and purpose will be met.
2. Whether AID should program additional resources toward achievement of the project purpose.

The primary users of the evaluation recommendations will be:

1. The University of Jordan
2. The Jordan Institute of Management
3. The Ministry of Planning
4. USAID/Jordan

III. BACKGROUND

In 1981 the Government of Jordan requested AID to assist in the design of a management development project to address a shortage of professionally competent middle and senior level business managers. This shortage was perceived as a principal constraint to the growth of the business sector and to improvements in Jordan's position as a regional business center. While initial discussions focused on the creation of a new, advanced management institute, it was later decided to work with existing institutions to keep costs down. In June of 1984, a four person consulting team composed of a human resource development expert, a professor in computers and statistics, and two retired business school deans, designed the project in cooperation with AID, senior Government of Jordan officials, business representatives, FEAS, and JIM.

Project Goal and Purpose:

Goal: To achieve better business management practices and the availability of more managers with both general and specific skills.

Purpose: To institutionalize and education/training process and to transfer the necessary technology to improve the quality and increase the quantity of professionally competent Jordanian business managers available in general and specialized skill areas.

Progress Toward Achievement of Planned Outputs (Planned quantities are noted in parenthesis):

FEAS:

MBA graduates (300): Approximately 125 MBA candidates are currently enrolled, 50 of whom were admitted to in Fall 87; since inception of program in 1983 seven MBA degrees have been awarded. Nine more MBA's are expected to be awarded by 9/88. In addition, about 50 candidates have enrolled in health services management program since its inception in the Fall of 1984, 16 of whom have received graduate degrees. (N.B. both FEAS and JIM were conducting programs prior to AID grant.)

Staff (13-16 upgraded/trained): Three professors have completed nine-month sabbatical/training programs in U.S., 2 in accounting and 1 in marketing. Director of microcomputer lab completed four-month program in 8/87. Two Ph.D. candidates in health management are now enrolled in programs in U.S.; one is expected to finish by 9/89 and the other by 12/90.

Curricula (3 new, 3 upgraded): New curricula have been developed in health management and in finance; plans to develop a specialization in insurance have been dropped. Marketing, management, and accounting curricula are being upgraded.

Research Projects (4): Criteria/procedures were agreed to by FEAS and AID in 8/87. While FEAS invited its staff members to submit proposals shortly thereafter, no proposals have been received to date.

Training AIDS: 39 PC systems now in operation. Westinghouse is in process of procuring library materials, audio visual aids, and additional computer hardware/software.

JIM:

Short term trainees (3400): Close to 150 manager attended the eight courses offered by Westinghouse and JIM in 1987 and 1988 (Computer Applications for Managers (2); Management Information Systems; International Marketing Strategies; and Corporate Financial Planning, Data Communications and Networks (2), Productivity Measurement and Improvement). From 1984-1987 a total of 2,982 managers participated in JIM programs (558 in 1984; 803 in 1985; 864 in 1986; and 757 in 1987).

Staff (9 upgraded/trained): JIM has hired two new trainers since project inception, bringing the full-time professional staff to eight persons. Six have completed short term training in the U.S. to date, while two more are scheduled for training in 1988.

Curricula (10 new courses per year): Jim and Westinghouse have completed curricula for the six courses mentioned above. JIM continues to update other courses.

Training AIDs: 24 PC systems now in operation. A limited amount of audio-visual equipment, films, books, and periodicals have also been purchased. Total purchased to date: \$120,000.

Problems and Issues

A. FEAS

1. Low Number of MBA's: The low number of graduates continues to be a concern. At this point in the life of the FEAS MBA program (5 years old in 9/88) annual throughout should be much higher than the 4 degrees awarded during the past year.
2. Staff for Finance Specialization: The recent appointment of PhD in finance alleviates this problem to some extent. However, faculty recruitment and retention (especially in finance) remain major problems, ones that threaten the overall success of the project.
3. Research Fund: In over one year of operation not a single research proposal has been submitted to AID. The lack of interest has been attributed to two factors: the low value placed on research at FEAS; the perception that the Research Fund does not offer adequate enough financial incentives.

B. JIM

1. Staff: The recent resignation of Dr. Mohammed Malallah, JIM's founder and director for ten years has stretched on JIM's administration and training staffs to the limit. The resignation of any of its four full-time trainers would prevent JIM from delivering the planned level of courses.

2. Cost Recovery: From 1985 to 1987 JIM's operating deficit more than doubled. Until JIM comes up with a bona fide plan to address this problem, requests to its parent organization, the Industrial Development Bank (IDB), for additional staff or an expansion of programs will probably be turned down by IDB.

IV. STATEMENT OF WORK

The Contractor shall answer the following questions, clearly distinguishing among findings, conclusions, and recommendations with respect to each question.

To what extent have Jordanian business management practices been affected so far by this project? By FEAS and JIM in general? (To be determined primarily by surveys of past/present students of JIM and FEAS programs and the businesses that employ them).

To what extent are JIM and FEAS capable of ensuring that their training programs address the areas of greatest demand/need?

What reasons have prevented individuals and businesses from more extensive use of FEAS and JIM programs.

What evidence is there that the institutional capacities of JIM and FEAS have been improved as a result of the project? As a result of other factors outside the project?

Does FEAS currently meet accreditation standards established in the United States by the American Assembly of Collegiate Schools of Business (AACSB)? Does the Health Services Management Program meet established U.S. standards? In what areas are they deficient?

To what extent have the professors and trainers financed under various AID funded contracts been successful in developing the skills of JIM and FEAS students? In passing on their knowledge to JIM and FEAS staff?

To what extent has AID funded training in the United States contributed to improvements in the curriculum/teaching methods at FEAS and JIM? What has been more effective: local on the job training or training in the U.S.?

To what extent has AID funded equipment (primarily computers) contributed to improvements in the curriculum/teaching methods at FEAS and JIM?

Is there sufficient demand for the MBA program to cover program costs? For the Health Services Management Program? For short term training programs at JIM?

Based on the evidence available to date should AID continue to work with these institutions/programs as vehicles to improve business management practices/ Should other institutions/programs be used as alternatives? Should new institutions/programs be established?

Assuming that efforts should continue to improve JIM and FEAS, what organizational changes should be made at JIM and FEAS to improve the relevancy of their programs to the needs of Jordanian businesses? Within this context should JIM be incorporated as a subsidiary of the Industrial Development Bank, rather than its current status as a division. Should a separate faculty of business be created at the University? If so, what departments should be included?

Assuming that efforts should continue to improve JIM and FEAS, what changes can be made in the personnel compensation systems at JIM and FEAS that would ensure attraction and retention of qualified personnel? In the promotion/tenuring systems?

V. METHODS AND PROCEDURES

1. Review of documents and reports relevant to the project, including the following:

Management Development Project Paper, September 18, 1984.

Project Agreement, September 18, 1984.

FEAS contract with Dr. Wadie Kamel.

FEAS contract with Westinghouse Institute for Resource Development.

JIM contract with Westinghouse Institute for Resource Development.

Miscellaneous equipment contracts.

Contractor work plans and progress reports.

AID progress reports.

Project correspondence.

2. Interview officials of the University of Jordan, FEAS, the Industrial Development Bank, JIM, Ministry of Planning, AID, and contractors.
3. Survey a random sample of past/current FEAS and JIM students and their employers.
4. Survey a random sample of Jordanian business persons/students that have not used JIM and FEAS services.

VI. COMPOSITION OF EVALUATION TEAM

1. Team Leader: At least 10 years experience in management development/training activities. Knowledge of AID evaluation procedures. Proven knowledge and application of statistical sampling techniques.
2. Corporate Training Specialist: At least 10 years experience as the head of a corporate in-house training department or a short term training institute. Will be primarily responsible for evaluating the JIM component of the project.
3. Business School Specialist: At least 10 years of experience in teaching and administrative positions within a accredited U.S. business school. At least 5 years must have been spent in the role of Dean or Vice Dean of an accredited U.S. Business school. Corporate experience a plus.

4. Health Management Specialist: At least 10 years of both academic and non-academic experience in the field of health and hospital administration.

VII. REPORTING REQUIREMENTS:

1. Final Report: The Contractor shall prepare a written report which includes the following:

Executive Summary: A three page, single spaced document containing a clear, concise summary of the most critical elements of the report.

Body of the Report: The Contractor shall address each of the questions listed in the Scope of Work, citing: findings (i.e., the "evidence"); conclusions (i.e., interpretation of the evidence and judgments based on this interpretation); and recommendations. The Contractor shall clearly distinguish among findings, conclusions, and recommendations.

Appendices: The Contractor shall include at a minimum the following: the evaluation scope of work; the Logical Framework; a description of the methodology used in the evaluation.

2. Report Submission: The Contractor shall submit a draft report at least two working days prior to departure from Jordan. AID, FEAS, and JIM will provide written comments within three weeks of submission of the report. The Contractor shall submit the final report within six weeks from the submission of the draft report.
3. Debriefing: The Contractor shall provide a formal debriefing(s) to AID, FEAS, JIM, and the Ministry of Planning within the week prior to departure from Jordan. The exact timing and location of the debriefing(s) will be worked out at a later date.

APPENDIX B

LOG FRAME MATRIX

of

Management Development Project - Jordan

COLUMN I

GOAL

To achieve better business management practices and the availability of more managers with both general and specific skills.

PURPOSE

To institutionalize an education/training process and to transfer the necessary technology to improve the quality and increase the quantity of professionally competent Jordanian business managers available in general and specialized business skill areas.

OUTPUTS

1. Students graduated from FEA's MBA program.
2. Participants trained by JIM.
3. FEAS members upgraded and/or trained.
4. JIM trainers upgraded and/or trained.
5. FEAS curricula upgraded.
6. New FEAS curricula developed.
7. Research projects undertaken.
8. Training aids for FEAS and JIM installed.

INPUTS

USAID financing of the following:

1. Training in the U.S. for existing and future FEAS faculty (PhD level) and JIM trainers.
2. American professors and trainers to help start new programs, replace Jordanians in training (including PhD programs) and help FEAS and JIM improve the quality of their programs.
3. Travel for FEAS and JIM personnel to: a) observe programs in the US which employ curricula or methodologies of possible value to FEAS or JIM; and b) promote clientele from other Arab Countries.
4. Teaching and training equipment and materials.

COLUMN II

OBJECTIVELY VERIFIABLE INDICATIONS OF PROGRESS

MEASURES OF GOAL ACHIEVEMENT

Growth in businesses employing FEAS graduates and JIM trainees.

MAGNITUDE OF OUTPUTS

1. At least 300 students graduated from FEAS's MBA program over the life of the project.
2. 3,400 participants trained by JIM.
3. 13-16 FEAS faculty members upgraded and/or trained.
4. 9 JIM trainers upgraded and/or trained.
5. 3 FEAS curricula upgraded.
6. 3 new FEAS curricula upgraded.
7. 40 research projects undertaken.
8. Training aids on site and being used.
9. 10 new JIM courses introduced each year.

END OF PROJECT STATUS

1. Graduates of FEAS and JIM programs occupy responsible management positions within their business sector organizations.
2. FEAS faculty to be functioning at expanded capacity (7 curricula and 20 FEAS faculty members) to service more undergraduated and graduate MBA students (120-150 MBA class by 1990).
3. JIM trainers to be functioning at expanded capacity (9 trainers) to service more participants (800 per year by 1989).

IMPLEMENTATION TARGETS (TYPE AND QUANTITY)

1. 6-8 PhD candidates sent to US in the following fields:

<u>FIELD</u>	<u>NUMBER</u>
Health & Hospital Administration	3
Banking & Finance	3
Insurance	2

2. Short-term skills upgrading for 7 FEAS faculty members on sabbatical in the following fields:

<u>FIELD</u>	<u>NUMBER</u>
Management	3
Marketing	1
Accounting	3

3. 9 JIM trainers to receive 56 person-months of training in U.S.

4. 3 U.S. faculty members working at FEAS in the following fields:

<u>FIELD</u>	<u>NUMBER</u>
Banking/Finance	3

5. 64 U.S. trainers visiting JIM for a total of 32 person-months.

6. 8 trips by FEAS faculty members and JIM personnel to observe other programs (curricula and methodologies) or to attract students.

7. The following equipment and materials: computers; library books/periodicals; training films.

COLUMN IIIPURPOSE

1. FEAS and JIM records.
2. Opinion survey of firms employing graduates and trainees.

OUTPUTS

FEAS and JIM records.

INPUTS

Project Records.

MEANS OF VERIFICATIONGOAL

Survey of opinion of executives in selected institutions.

PURPOSE

1. FEAS and JIM records.
2. Opinion survey of firms employing graduates and trainees.

COLUMN IV

ASSUMPTIONS

1. That deficiencies in the quality and quantity of Jordanian managers is an important obstacle to the growth of business.
2. That other factors necessary for growth, such as capital, favorable economic conditions, skilled workers, favorable government policies and entrepreneurship, will continue to exist.
3. That the gap between the demand for and supply of managers will continue to be significant and not be reduced radically, e.g. by return of personnel from the Gulf States.

PURPOSE

1. That education & training to be provided at FEAS and JIM will respond to the most urgent needs of Jordanian management and make a substantial impact on the program.

OUTPUTS

1. That FEAS and JIM are capable of administering the qualitative and quantitative improvements proposed.
2. That FEAS and JIM will maintain in the level of administrative competence required for successful implementation of the project.
3. That participation in decision-making and responsibility for organizational goals in the FEAS will be broadened so that its effectiveness is not dependent on one person.
4. That the "brain drain" of FEAS faculty and JIM trainers will not be significantly diminish the capability of those institutions during the life of the project.
5. That FEAS wages and JIM trainer compensation packages will be adequate to retain their staff.
6. That the selected PhD and trainee candidates will successfully complete their education and training programs and return to FEAS and JIM and that their education and training will substantially contribute to their effectiveness.
7. That U.S. technical assistance personnel will be effective.
8. That observation and promotion tours will produce useful innovations and "sales".
9. That the equipment and materials to be furnished will contribute to the effectiveness of education and training.

FEAS

EVALUATION FORMAT

EVALUATOR: _____

DATE _____

PERSONS INTERVIEWED _____

QUESTIONS	FINDINGS
<p>1. To what extent have Jordanian business management practices been affected by the FEAS portion of this project ?</p>	
<p>2. To what extent is FEAS capable of ensuring that their programs address the areas of greatest demand/need ?</p>	
<p>3. What reasons have prevented individuals and businesses from more extensive use of FEAS programs ?</p>	
<p>4. What evidence is there that the institutional capacity of FEAS has been improved as a result of the project ?</p>	
<p>5. Does FEAS currently meet accreditation standards established in the U.S. by AACSB ?</p> <p>In what areas deficient ?</p>	
<p>6. Does the Health Services Mgt. Program meet established U.S. Standards ?</p> <p>In what areas deficient ?</p>	

QUESTIONS	FINDINGS
<p>7. To what extent have the professors funded under various AID contracts been successful in developing the skills of FEAS students?</p> <p>In passing on their knowledge to FEAS staff ?</p>	
<p>8. To what extent have AID funded training in the U.S. contributed to improvements in the curriculum/teaching methods ?</p>	
<p>9. What has been more effective: local on-the-job training or training in the U.S.?</p>	
<p>10. To what extent has AID funded equipment (computers) contributed to improvements in the curriculum/teaching methods at FEAS ?</p>	
<p>11. Is there sufficient demand for the MBA program to cover program costs ?</p> <p>For the Health Services Mgt. Program?</p>	
<p>12. Should AID continue to work with FEAS as a vehicle to improve business mgt. practices ?</p> <p>Should some other be used as an alternative ?</p> <p>Should new institutions/ programs be established ??</p>	

FEAS Evaluation
page 3

QUESTIONS	FINDINGS
<p>13. What organizational changes should be made at FEAS to improve the relevancy of their programs to the needs of Jordanian businesses ?</p>	
<p>14. Should a separate faculty of business be created at the University ?</p> <p>If so, what departments should be included ?</p>	
<p>15. Should a separate faculty of business be created at the University ?</p> <p>If so, what departments should be included ?</p>	
<p>15. What changes can be made in the personnel compensation system at FEAS that would ensure attraction and retention of qualified personnel ?</p> <p>In the promotion/tenure systems ??</p>	

FEAS

EVALUATION FORMAT

EVALUATOR: _____

DATE _____

PERSONS INTERVIEWED _____

QUESTIONS	CONCLUSIONS	RECOMMEND
1. To what extent have Jordanian business management practices been affected by the FEAS portion of this project ?		
2. To what extent is FEAS capable of ensuring that their programs address the areas of greatest demand/need ?		
3. What reasons have prevented individuals and businesses from more extensive use of FEAS programs ?		
4. What evidence is there that the institutional capacity of FEAS has been improved as a result of the project ?		
5. Does FEAS currently meet accreditation standards established in the U.S. by AACSB ? In what areas deficient ?		
6. Does the Health Services Mgt. Program meet established U.S. Standards ? In what areas deficient ?		

FEAS Evaluation
page 2

QUESTIONS	CONCLUSIONS	RECOMMENDATIONS
<p>7. To what extent have the professors funded under various AID contracts been successful in developing the skills of FEAS students?</p> <p>In passing on their knowledge to FEAS staff ?</p>		
<p>8. To what extent have AID funded training in the U.S. contributed to improvements in the curriculum/teaching methods ?</p>		
<p>9. What has been more effective: local on-the-job training or training in the U.S.?</p>		
<p>10. To what extent has AID funded equipment (computers) contributed to improvements in the curriculum/teaching methods at FEAS ?</p>		
<p>11. Is there sufficient demand for the MBA program to cover program costs ?</p> <p>For the Health Services Mgt. Program?</p>		
<p>12. Should AID continue to work with FEAS as a vehicle to improve business mgt. practices ?</p> <p>Should some other be used as an alternative ?</p> <p>Should new institutions/ programs be established ??</p>		

FEAS Evaluation
page 3

QUESTIONS	CONCLUSIONS	RECOMMENDATIONS
-----------	-------------	-----------------

3. What organizational changes should be made at FEAS to improve the relevancy of their programs to the needs of Jordanian businesses ?

4. Should a separate faculty of business be created at the University ?
If so, what departments should be included ?

5. Should a separate faculty of business be created at the University ?
If so, what departments should be included ?

Best Available Copy

5. What changes can be made in the personnel compensation system at FEAS that would ensure attraction and retention of qualified personnel ?
In the promotion/tenure systems ??

APPENDIX D-1

INTERVIEWING LIST MBA

The following people were interviewed to gather information on the MBA program currently offered by FEAS.

1. Dr. Mahmoud Sammrah
Vice President of Humanities (Acting President while President is out of country)
2. Dr. Wadie Sharaiha
Dean, FEAS
3. Dr. Muhsen Makhamreh
Project Coordinator
Associate Professor of Management, FEAS
4. Dr. Omaymah Dahhan
Chairman, Business Admin. Department, FEAS
5. Dr. Hani Abujabarah
Chairman, Accounting Dept., FEAS
6. Dr. Naim Dahmash
Professor of Accounting, FEAS, and
Director, Bureau of Internal Control,
University of Jordan
7. Dr. Fuad Sheikh Salem
Professor of Marketing, FEAS, (on leave) and
Vice President for Administrative Affairs,
Yarmouk University (3-year appointment)
8. Dr. M. Alfaleh
Associate Professor of Management, FEAS
9. Dr. M. Obaidat
Assistant Professor of Marketing & Consumer Behavior,
FEAS
10. Dr. David Loy
Visiting Professor of Finance, FEAS
11. Mr. Ziad Mummen
Acting Director of Computer Lab, FEAS
12. Mr. Ali Ainsour
Supervisor, Computer Lab, FEAS

13. Mr. Mohamed J. Darwish
Head of Periodicals Dept.,
University of Jordan Library
14. Twelve students who have graduated from the MBA program
15. One student who has received the diploma from the MBA
program. (completed all course work)
16. Twelve students currently enrolled in the MBA program.
17. One student who has dropped out of the MBA program and
does not plan to return.
18. Mr. S. T. Darwazeh
General Manager, Al-Hikma Pharmaceuticals
Chairman, Exporters Council
19. Mr. Said Darwayah
Son of General Manager (above) and
Graduate of MBA in the U.S.
20. Mr. Mohammad M. Asfour
Chairman,
Federation of Jordanian Chambers of Commerce
21. Mr. Amin Y. Hussein
Secretary General,
Federation of Jordanian Chambers of Commerce
22. Mr. Mamdouh Abdul Jawad
Asst. General Manager,
Assoc. of Banks in Jordan
23. Mr. Khalidun A. Abu-Hassan
Chairman, Amman Chamber of Industry
24. Mr. Ali Dajani
Amman Chamber of Commerce
25. Mr. Walid H. Khatib
Amman Chamber of Industry
26. Mr. Richard Rousseau
Project Officer
U.S. Agency for International Development
Amman, Jordan

APPENDIX D-2

INTERVIEWING LIST

HEALTH SERVICES MANAGEMENT

1. Students Currently Enrolled:
Mariam Ali Dokhi Honayte
Fares Fayad Sabahat
Manal George Swedan
Heyam Ahmad Salama
Nadia Saleem Ageel Jefelan
Salem Sa'ad Moh'd Hanini
Najah Khaleel Jaradean
Omar Wahdan
Ahmad Okasha
Fadia Haddad
Rwzek Jabar Abu-Kasnef
2. Dr. Wadie Kamel
Visiting Professor & Coordinator
Health services Management
FEAS, Univ. of Jordan
3. Mathew Yee
Lecturer
Health Services Management
FEAS, Univ. of Jordan
4. Dr. Wadie Sharaiha
Dean of FEAS
University of Jordan
5. Dr. Mushhen A. Makhamreh
Faculty Member of FEAS
Project Manager,
USAID FEAS Project
6. Dr. Fawzi Ghariabeh
Vice President
Administration & Finance
University of Jordan
7. Munir H. Zaghloul
Acting Director
Jordan Institute of Management
8. Lieutenant General Nial Ajlouni
Director General
Royal Medical Services

9. Dr. Rizak Rashdan
Deputy Dir. General,
National Medical Institute
Director,
University Hospital

10. Dr. Ali El-Hawamdeh
General Director
Islamic Hospital

11. Program Graduates, Master of Health Services Management

Dr. Fahed Abbadi
Deputy Director,
Psychiatric Hospital

Dr. Khuloud J. Khayyat-Dajani
Dept. of Planning, Training, and Research
Ministry of Health

Mr. Nazen Abdul Aziz Maswady, RN
Nursing Coordinator
Islamic Hospital

PERSONS INTERVIEWED JIM EVALUATION

USAID/JORDAN

Mr. Lewis Reade	Mission Director
Mr. Richard Rousseau	Private Sector Officer

JORDAN INSTITUTE OF MANAGEMENT

Dr. Munir H. Zaghloui	Acting Director
Dr. Kamal S. Ismail	Accounting/Finance Director
Dr. Sameh A. Abu Laban	Management Director
Dr. Ziad Quassim	Marketing Director
Dr. Ali El-Kuz	Computer Science Director
Mr. Adel Dawood	Training Coordinator
Mr. Lutfi Al Khawaja	Computer Assistant Trainer
Ms. Mary Najjar	Administrative Assistant
Mr. Osama Passem Al-Nasser	Computer Operator

UNIVERSITY OF JORDAN

Dr. Wadie Sharaiba	Dean, Faculty of Economics and Administrative Sciences (FEAS)
Dr. Muhsen A. Makhamreh	Faculty Member, FEAS
Dr. Wadie Kamel	Faculty Member, FEAS

PRIVATE JORDAN COMPANIES AND INSTITUTIONS

Mr. Awad Zu'bi	Jordan Electricity Authority
Mr. Hasan Matar	Royal Jordanian Airlines
Mr. _____ Hasan	Royal Jordanian Airlines
Mr. Makram M. Zoraikat	Jordan Phosphatene Mines Co.
Mr. Ihsan M. Afghani	Jordan Phosphatene Mines Co.
Mr. Wael G. Mihyar	Jordan Phosphatene Mines Co.
Ms. Khou Noud Saqqaf	Jordan Phosphatene Mines Co.
Mr. Zaid W. Bitar	Jordan Eagle Insurance Co.
Ms. Alis Ammari	Jordan Central Bank
Mr. Jamal Qasim	Jordan Central Bank
Mr. Ziad Dedien	Jordan Central Bank
Mr. Kamil Nazez	Jordan Central Bank
Mr. Ibrahim Warnehi	Jordan Central Bank
Mr. Samir Mahdi	Arab Land Bank
Mr. Hanna W. Hanna	Cairo Amman Bank
Mr. Munir Sabri Al-Joundi	Arab Company for Drug Industries
Mr. Moh'd Rasoul Bayazidi	Arab Company for Drug Industries
Mr. Ahmad Gharaibeh	Arab Company for Drug Industries
Mr. Saleh Yousef	Arab Company for Drug Industries
Mr. Omar Said	Arab Company for Drug Industries
Ms. Berradit Yousif	Arab Company for Drug Industries
Ms. Mariam Jaimeni	Arab Company for Drug Industries
Mr. Ahmad Atrash	Arab Company for Drug Industries
Mr. Ali Abu Hamideh	Arab Company for Drug Industries
Mr. Abdel-Karim Alawin	Jordan Petroleum Refinery Co.

Mr. Hazem M. Hammuri	Jordan Petroleum Refinery Co.
Mr. Mohamad Rashied Halawani	Jordan Petroleum Refinery Co.
Mr. Mohammad Anees	Arab Potash Company
Mr. Sabri Amarneh	Arab Potash Company
Mr. Taiolal Majali	Arab Potash Company
Mr. Mohammad Amin	Arab Potash Company
Mr. Mohamond Abaulaziz	Arab Potash Company

OTHER PERSONS AND INSTITUTIONS

Mr. Walid H. Khatib	Amman Chamber of Industry
Ms. Nadia Haddad	Amman Chamber of Industry
Mr. Ali Da Jami	Amman Chamber of Industry
Ms. Makboula Hammoudeh	TEAM-Cairo
Dr. Helmi Sallam	TEAM-Cairo
Mr. John Andrica	AT Kearney/MMIS Project
Mr. Knut Meyer	AT Kearney/MMIS Project

APPENDIX E-1

RECORDS REVIEW

1. "Jordan: Project 278-0261 Management Development Grant"
2. "Project Agreement, Sept. 18, 1984"
3. "FEAS Contract with Westinghouse IRD"
4. "JIM Contract with Westinghouse IRD"
5. Contractor Work Plans & Progress Report"
6. AID Progress Reports
7. Evaluation Format prepared by Bill Berg
8. "A Business Guide To Jordan", April, 1988
9. Correspondence on the salary situation at FEAS provided by Dir. Lewis Reade
10. A list of faculty & staff provided by R. Rousseau
12. A report filed by Dr. R. Curtis Hamm
13. Institute for Resource Development. Inc. reports provided by Richard Rousseau
14. Admissions Procedures
15. Reports filed by David Loy provided by R. Rousseau
16. Program data vs. AACSB Standards for MBA programs
17. Faculty CVs and course syllabi where available

RECORDS REVIEW HEALTH SERVICES MANAGEMENT

1. Health Services Management Program Brochure
2. Student's Enrollment Review
3. The Study Plan for Masters Degree
4. Projection for Student Enrollment. 1989 / 1990 - 1992/1993 (Four Year Plan)
5. Diploma Proposal
6. Minor in H.S.M. Proposal
7. Course Descriptions
8. Course Syllabus
9. Comprehensive Exam. Areas of Study
10. Comprehensive Exam. Model
11. Dr. Donald White 1986 Evaluation
12. Dr. Hassouna Evaluation Response 1987
13. Quarterly Reports (From Feb. '87 to 1989)
14. Consultant Reports

APPENDIX F-1

EXCERPTS FROM THE AACSB
ACCREDITATION STANDARDS AND GUIDELINES FOR
MASTERS IN BUSINESS ADMINISTRATION PROGRAMS

ACCREDITATION PHILOSOPHY AND PRECONDITIONS

The objective of accreditation is to foster high quality in education for business administration. Attention shall be given to both the qualitative considerations and the quantitative measures set forth in the Accreditation Standards.

Compliance with the more quantifiable Standards, by itself, is not sufficient for accreditation. Departures from Standards will be accepted if the school can demonstrate that high quality is achieved. In all cases, the overriding concern is the achievement of overall high quality.

Accreditation will take into account all programs in business administration. Business administration programs for particular industries, such as hotel/restaurant management, if offered within the business unit, must meet all Standards.

As a precondition for accreditation, the school or college shall:

- (a) be an autonomous degree-recommending school or college reporting to the central administration in the same manner as do all other autonomous degree-recommending units of the institution; academic units with designations other than school or college will be considered for accreditation only if the designation is common to all degree-recommending units in the parent institution and the academic units are essentially identical to units commonly identified as schools or colleges;
- (b) have as its primary mission education for business administration;
- (c) have business administration programs which have been established and in operation for such a period of time as to make possible an evaluation of their quality and be expected to demonstrate compliance with the Standards during the self-study year, as well as the year of visitation, of the accreditation process;

In judging "...such a period of time..." factors to be examined are the following: number of years the school has been awarding degrees in business administration (under any title), how many degrees it has already awarded, the number of students currently enrolled, the trend of enrollments where present enrollment is low, continuity of curriculum, faculty, and administration of the school, and other factors deemed relevant.

- (f) have an educational environment which permits the school to pursue acceptable objectives with a minimum of external interference or diversion of effort;
- (g) have a dean or administrative head who has jurisdiction or participating control over all business administration programs and business administration faculty.

Participating control means the ability of the dean of the unit holding or seeking accreditation to influence faculty resources, curriculum, and admissions so that all business administration programs are offered on a basis which is consistent with the Standards.

I. MISSION AND OBJECTIVES

The school shall clearly state its mission, and shall have an orderly, integrative process for developing objectives that are consistent with the mission, the institution as a whole, and with the overall high quality embodied in these Standards. The objectives should be realistic for the school, given the available resources and people. Management of resources should be consistent with these objectives.

II. ADMISSION OF STUDENTS

At the masters level, it is expected that admission will be granted only to students showing high promise of success in postgraduate business study.

Indicators of high promise from at least two of the following categories shall be employed in the admissions process:

1. Testing -- candidate's performance on the GMAT or on any other relevant testing device.
2. Previous schooling -- candidate's overall or upper division grade point average prior to masters admission, or any other relevant measure of scholastic performance.

3. Experience -- a record of appropriate employment at increasing levels of responsibility.

III. PERSONNEL

The school shall have academic and nonacademic personnel and/or other instructional and support resources of sufficient quality and in sufficient quantity to foster overall high quality in education for business administration.

The school also shall have policies and practices for managing these personnel resources to foster overall high quality in education for business administration.

A. PERSONNEL CLASSIFICATIONS

Personnel of the school in the following categories will be considered:

1. Full-time Personnel

a. Faculty

The faculty shall consist of persons who hold academic appointments with primary responsibility for instruction, research and academic administration.

Full-time normally means a faculty member whose total salary from the university for the usual period of an academic year falls within the salary range of the unit for the academic appointment held.

If a person is appointed on a full-time basis in the university and devotes part-time to the school, that portion devoted to the school may be classified in the full-time faculty category.

b. Support and Service personnel

These persons are typically associated with the direction and operation of such units as the office of the dean, professional counseling services, libraries, computing centers, field services, secretarial services, and research bureaus. These persons may or may not hold academic appointments.

2. Part-time Personnel

a. Faculty

This category includes faculty who are employed on less than a full-time basis.

b. Support and service personnel

This category includes personnel employed on a part-time basis such as research assistants, graders, programmers, clerks and typists, in the units described in III, A, 1, b.

B. PERSONNEL QUALIFICATIONS, PERFORMANCE, & RESOURCES

The faculty as a whole shall be of sufficient number and shall demonstrate the capabilities, experience, professional involvement, instructional performance, scholarly productivity, and service essential for overall high quality.

Instructional performance includes teaching effectiveness, the extent of engagement in innovative curricula development, experimentation in teaching methods, updating course content, effective student counseling, and other meaningful efforts to improve the instructional program.

The quality of the educational experience of the student is of major importance. A plan for the evaluation of teaching activity should be in place and be of significance in the annual evaluation of each faculty member. Evidence to be considered may include student and peer evaluations, review of teaching materials, participation in continuing education activities, and other factors.

Scholarly productivity includes the quality and extent of research and publication.

A reasonable cross-section of the faculty should be regularly engaged in research and publication. The scholarly productivity of a faculty offering a graduate program should exceed that of a faculty offering only an undergraduate program.

Professional involvement includes academic, business, and professional experience which contributes to enhanced teaching and research competence.

Service includes involvement in university, community, and professional activities which contribute to teaching and research competence.

The school shall have plans and policies that encourage and provide a framework for continuing professional development and increasing productivity of its faculty.

1. Faculty Qualifications

Significant dimensions in the consideration of faculty competence are the doctoral and professional qualifications of the faculty.

2. Faculty Resources and Deployment

a. Critical Mass

The school shall have achieved a critical mass of faculty. In judging whether such a critical mass is present, consideration will be given to factors such as the depth and breadth of professional interest represented by the faculty; the opportunities for professional interaction among the faculty; and the opportunities for students to be exposed to the appropriate range of faculty viewpoints and content areas within major programs of study.

c. Full-time faculty

The faculty shall be composed largely of full-time personnel who are responsible for the planning and implementing of the school's programs.

d. Distribution of faculty

The number and qualifications of faculty and their distribution among day and evening course offerings and locations shall be such that each group of students has reasonable and comparable opportunity to study with doctoral, full-time, and other qualified faculty.

e. Total responsibilities of faculty

Members of the faculty should not teach courses in excess of twelve credit hours per week, have preparations in more than three different courses per week, nor teach in more than two fields. Assignment of

responsibilities for graduate instruction, research direction, and thesis supervision, or of other major responsibilities should result in downward adjustment of the teaching load. Judgements concerning teaching, research, and administrative loads of the faculty shall be based upon the entire academic year.

3. Support and Service Personnel

In order to operate effectively, the faculty shall have a staff of support and service personnel commensurate with the stated objectives of the school.

IV. CURRICULUM

The purpose of the curriculum shall be to provide for a broad education preparing the student for imaginative and responsible citizenship and leadership roles in business and society -- domestic and worldwide. The curriculum shall be responsive to social, economic, and technological developments and shall reflect the application of evolving knowledge in economics and the behavioral and quantitative sciences. To facilitate the foregoing, the Accreditation Council encourages continuing development and appraisal of both new and existing curricula.

There is no intention that any single approach is required to satisfy the world-wide dimension of the Curriculum Standard, but every student should be exposed to the international dimension through one or more elements of the curriculum.

To provide students with the common body of knowledge in business administration, programs shall include in their course of instruction the equivalent of at least one year of work comprising the following areas:

- (a) a background of the concepts, processes and institutions in the production and marketing of goods and/or services and the financing of the business enterprise or other forms of organization;
- (b) a background of the economic and legal environment as it pertains to profit and/or nonprofit organizations along with ethical considerations and social and political influences as they affect such organizations;
- (c) a basic understanding of the concepts and applications of accounting, of quantitative methods, and management information systems including computer applications;

- (d) a study of organizational theory, behavior, and interpersonal communications;
- (e) a study of administrative processes under conditions of uncertainty including integrating analysis and policy determination at the overall management level.

Masters degree programs in business administration must require students to have completed, either at the undergraduate or graduate level, the equivalent of the common body of knowledge in business administration as set forth above.

The common body of knowledge may be satisfied by undergraduate or graduate work. The requirements of less than 30 semester hours of undergraduate courses or 20 semester hours of work in courses reserved exclusively for graduate students to satisfy the common body of knowledge is presumed to be insufficient.

For the MBA degree, it is expected that the program in addition to the courses identified as satisfying the common body of knowledge shall be broad in nature and aimed at general competence for overall management.

"Breadth" means that the student must earn at least 15 semester credit hours or equivalent of work in addition to that in the common body of knowledge outside the field of specialization.

V. LIBRARY AND COMPUTER RESOURCES, FACILITIES, & SERVICES

The institution shall maintain a collection of business administration literature and reference materials sufficient to meet the objectives of the business unit. The library shall provide effective selection, user education, and retrieval service.

Computer hardware, software, and support resources available for teaching and research shall be of sufficient capacity and accessibility to support curricular objectives and to encourage computer-assisted research and pedagogical development consistent with the objectives of the business unit.

VI. FINANCIAL RESOURCES, FACILITIES, AND EQUIPMENT

The budget shall be sufficient to support the objectives of the business unit. The physical facilities, including buildings and equipment, shall be suitable to serve the objectives of the business unit. Where resource efficiency

appears inadequate to support quality programs, comparisons with support levels allocated to other relevant programs at the institution may be pertinent.

**CRITERIA for a
GRADUATE PROGRAM in
HEALTH SERVICES ADMINISTRATION**

of the

**ACCREDITING COMMISSION ON
EDUCATION FOR HEALTH
SERVICES ADMINISTRATION**

**ACEHSA
Suite 503
1911 North Fort Myer Drive
Arlington, Virginia 22209
(703) 524-0511**

**ADOPTED: JULY 1982
REPRINTED: MAY 1988**

**ACCREDITING COMMISSION ON EDUCATION
FOR
HEALTH SERVICES ADMINISTRATION**

The Accrediting Commission on Education for Health Services Administration was organized in 1968 as the Accrediting Commission on Graduate Education for Hospital Administration. The name was changed in 1975 to more accurately reflect its scope and mission.

The Commission has been accorded formal recognition by the Council on Postsecondary Accreditation and the U.S. Department of Education. The Commission offers accreditation to graduate programs at the master's level or the equivalent that prepare administrators for personal health institutions and programs.

The Commission is organized to establish criteria for graduate education in health administration; planning and policy; conduct surveys that will encourage universities to maintain and improve their programs; and determine compliance with criteria. A list of accredited programs is available from the Commission's office.

MEMBERS

The following member organizations appoint Commissioners. In addition there are two Commissioners who represent the public.

American College of Healthcare Executives
American College of Health Care
Administrators
American College of Medical Group
Administrators
American Hospital Association
American Public Health Association
Association of University Programs
in Health Administration
Canadian College of Health Service
Executives/Canadian Hospital Association
Association of Mental Health Administrators

CRITERIA

FOR A GRADUATE PROGRAM
IN HEALTH SERVICES ADMINISTRATION

PREAMBLE

The accreditation program of the Accrediting Commission on Education for Health Services Administration (ACEHSA) is designed to foster high quality professional education for health services administration. ACEHSA Criteria apply to individual academic programs offering a major course of study in health services administration leading to a professionally-oriented master's degree. The Commission, in its accrediting process, recognizes that flexibility and innovation are essential to the design and development of curricula and course formats which meet the diverse educational needs of all students (full-time and part-time) and address the broad scope of career opportunities in the field of health services administration.

The formally identified objectives, mission and purpose of a Program serve as the basis upon which the Criteria will be applied. It is the desire of the Accrediting Commission to encourage programs to strive for the achievement of the highest possible quality in their educational process. All programs seeking accreditation are subject to the following Criteria. The Commission recognizes that some latitude in the application of the Criteria may be appropriate for programs considered to be nontraditional in design, structure or setting within the University.

Best Available Copy

CRITERIA

I. Eligibility

- A. The University shall have established health services administration as a major course of study leading to a master's degree. Establishment of the Program shall have been approved by the appropriate University governing body.

COMMENT: The term health services administration includes administration of the broad spectrum of programs and institutions with a primary focus on personal health services. The emphasis placed on various programmatic and institutional applications of health services administration depends upon the specific objectives of that curriculum.

- B. The applicant Program in health services administration shall have graduated at least one class.
- C. Programs shall be a part of an institution of higher learning which has achieved regional accreditation or equivalent recognition.

COMMENT: In the United States the institution shall be an accredited member of one of the regional accrediting associations recognized by the Council on Postsecondary Accreditation. In Canada, the institution shall hold provisional or ordinary membership in the Association of Universities and Colleges of Canada.

- D. It is expected that if the Program is located in a specialized graduate school (such as a medical school, school of public health, school of business administration) within a University, the school shall be accredited by the appropriate recognized specialized accrediting agency.

COMMENT: In the event of absence of accreditation, a determination will be made as to the extent to which lack of accreditation is detrimental to the quality of the Program.

II. Resources

A. The academic resources of the University shall be sufficiently broad to support a master's degree Program. Educational policy as well as administrative practices within the University shall enable the Program to have sufficient access to those resources.

COMMENT: The requirements of the curriculum of a Program are such that in most Universities the subject matter is not available in a single administrative unit, but requires the utilization of the resources of several schools and/or graduate departments.

B. There shall be demonstrated stability and continuity of adequate support provided to the Program by the University.

COMMENT: Support includes all resources relevant to maintaining an effective educational Program. This includes financial support for salaries and professional development. It also includes other resources which may be allocated apart from financial support such as physical facilities and personnel.

C. There shall be readily available to the Program adequate library and data processing resources pertinent to the curriculum of the Program.

D. The Program shall have available to it a variety of health services agencies and institutions adequate to meet its instructional objectives.

III. The Program

A. The Program shall have an explicit statement of its objectives for the course of study.

COMMENT: The Commission will use these objectives as a baseline against which to measure program effectiveness. The statement should reflect consistency with student career goals, University

- 2 -

expectations and resources, and faculty efforts for program development. It should cover supporting and related objectives for research and community service. It should be sufficiently explicit in addressing outcome expectations in relationship to career directions so as to be a useful guide and measure of progress toward achievements for faculty, University, students and other constituents as well as the Commission.

B. There shall be no discrimination on the basis of sex, creed, race or ethnicity in any respect of the Program's activities.

COMMENT: The Program shall be in full compliance with relevant laws and University policy regarding affirmative action and equal opportunity requirements. Nothing herein shall be construed to prevent a University from having a religious affiliation and purpose and adopting policies of admission and employment that directly relate to such affiliation and purpose so long as notice of such policies has been provided to applicants, students, faculty, and employees.

IV. The Curriculum

A. The Program shall require the equivalent of full-time study beyond the baccalaureate level of not less than two academic years as defined by the University.

COMMENT: For the learning sequences outlined below, in a traditional educational setting, the Commission has found that this requires more than one academic year of on-campus work. Prior experiences may be considered in establishing the time required for individual students to complete the curriculum. The Commission will evaluate the adequacy of the method by which equivalency is determined and assessed.

- 3 -

Best Available Copy

B. The curriculum shall be conceived as a series of integrated, structured learning sequences designed primarily to prepare the student for the career(s) designated in the Program's objectives.

COMMENT: Considerable faculty effort should be directed toward conceptualization of curriculum by employing a process which examines the values which are implicit in the faculty's approach; priorities in the sequencing of specific courses; the levels of conceptual analysis required of the student; the determination of elective and required course content; differential curriculum requirements which may be necessary for students entering different professional fields (e.g., hospital administration, long-term care administration, health planning, policy analysis, mental health administration, ambulatory care administration) and the integration of field work activities.

C. The following content areas shall be addressed in the curriculum:

COMMENT: The Commission will seek evidence that the contribution of each of the following areas of academic study has been carefully evaluated in the light of career objectives specified in Criterion IV.B. by the Program. The faculty should be prepared to give evidence that the following content areas have been addressed in the curriculum.

1. The study of relevant aspects of the social-behavioral disciplines.

COMMENT: The relevant aspects of the social-behavioral disciplines encompass those aspects of economics, sociology, psychology and political science which provide the student with analytical frameworks for studying and understanding health services administration.

2. The study of individual, social and environmental determinants of health, disease and disability.

COMMENT: Individual, social and environmental determinants of health, disease and disability encompass the study of what health is, how health is measured, the patterns and characteristics of illness in the individual, family and community and the variety of health promotion and disease prevention interventions possible within a health care system.

3. The study of the elements of personal health services systems.

COMMENT: The elements of personal health services systems encompass the various ways of delivering personal health services with regard to their evolution, governance, financial structure, changing characteristics and relationships, and mechanisms for quality assessment and social accountability.

4. The study of management and of administrative skills and their application to health services organizations.

COMMENT: The study of management encompasses organization behavior, quantitative methods, financial management, information systems, law and strategic planning presented in the context of the social, legal, and regulatory environment of the delivery of personal health services.

The study of administrative skills encompasses the integration and application to health services fundamentals of financing, planning, policy development, marketing, staffing, personnel management and labor relations, and evaluation in such settings as multi-institutional and multipurpose systems, hospitals, planning and regulatory agencies, programs and facilities for home health, long-term care, ambulatory care, mental health, etc.

The study fields of management and administrative skills requires integration and attention to the interaction of values and managerial decision making.

Best Available Copy

D. Required field work shall be consistent with Program objectives.

COMMENT: There is a wide variety of field work options available. Faculty involvement in the selection, supervision and evaluation of the field work is essential to whichever option is offered.

V. The Faculty

A. There shall be sufficient number of full-time faculty, academically and professionally qualified for the teaching obligations of the Program.

COMMENT: The Commission will seek evidence that:

(a) Student/faculty ratios are sufficient to permit high quality instruction.

(b) Faculty are allowed time for and can demonstrate a record of research and professional service appropriate to the stage of their academic career development (See Section VIII.)

(c) Deliberate efforts are made to recruit well qualified faculty, providing role models representing a diversity of race, ethnic origin, and gender.

(d) Faculty are academically prepared for the subjects they teach and are encouraged to maintain their teaching effectiveness by routine review of curriculum, student performance, and student evaluation. (See Sections VI and VIII.)

B. Each Program shall have a minimum of two full-time faculty members, who hold professional appointments (assistant, associate or full professor).

C. Reliance placed upon part-time faculty shall be consistent with the skills these individuals bring and the magnitude and the permanence of their contribution.

COMMENT: The Commission will seek evidence that the ratio of full to part-time teaching faculty is adequate in light of the introduction of specific disciplines, the use of practicing professionals, stability of the Program, and the accomplishment of other criteria; and that part-time faculty are appropriately integrated into the governance of the faculty.

D. The organization of the Program and its relationship to larger academic units shall be conducive to scholarly and academic productivity.

COMMENT: The Commission will seek evidence that:

(a) The relationship of the Program to larger units and the administration of the Program itself is consistent with principles of academic freedom and clearly understood by the faculty.

(b) The responsibility and authorities of administrative faculty (directors, chairs, deans, etc.) are clearly understood and consistently executed.

(c) Program leadership has sufficient authority to meet the needs of the Program and receive appropriate recognition for this responsibility.

(d) The Program has opportunity to develop and justify resource needs (i.e., a budget) consistent with that offered in other units.

(e) Policies of the Program and relevant larger units are designed to recognize teaching, research and community service consistent with the objectives of the Program and the requirements of the Commission.

E. The faculty of the Program shall participate in the recruitment, evaluation and promotion of its members in accordance with University policy.

COMMENT: The Commission will seek evidence of appropriate membership on search and promotion (tenure) committees and of policies for routine peer review of faculty achievement.

F. The faculty of the Program shall have primary responsibility for recommendations for admissions of students to the Program and for recommendations for awarding of degrees.

COMMENT: The Commission understands the responsibility of the larger units to maintain University standards. The Commission will seek evidence that the primary or initial responsibility for these matters rests with the Program faculty.

G. The faculty shall have primary responsibility for specifying health services administration content in the course of study and appropriate participation in the design of the remainder of the Program.

VI. The Student and the Graduate

A. The Program shall have established selection and retention criteria and shall offer evidence that these criteria are applied equitably. These selection criteria shall be in accordance with the established criteria of the University.

B. Consistent with sound educational policy and the Criteria, the Program shall demonstrate a commitment to providing full opportunities for the study of health services administration and entry into the profession by qualified members of racial and ethnic minority groups.

COMMENT: This commitment would typically include a special concern for determining the potential of such applicants through the admission process, special recruitment efforts, and a program which assists in meeting the unusual financial needs of many such students, provided that no school is obligated to apply standards for the award of financial assistance different from those applied to other students.

C. There shall be an explicit statement of standards used to evaluate student performance and qualifications for the degree and degree of consistent application thereof.

D. The Program shall have mechanisms for student involvement in program evaluation.

COMMENT: The components of the Program which students may participate may include: co-instruction, instructor evaluation, curriculum development and evaluation, student recruitment and admission, and new faculty selection. Student involvement shall be demonstrated in a variety of ways: e.g., membership on faculty committees, membership in advisory groups and use of questionnaires and other formal communicative methods.

E. There shall be a systematic effort to recognize professional career developments of graduates and consideration of such professional career developments in curriculum design.

F. The Program shall have established a formal system for counseling students prior to and during and at the end of their course of study which is consistent with their career goals.

VII. Research

There shall be evidence of faculty activity directed toward development of new knowledge related to health services administration. There shall also be evidence of policies providing appropriate time and other support for faculty research activities consistent with the policies of the University.

COMMENT: The Commission will seek evidence that the faculty engages in research relevant to area(s) of individual interest and collectively encourages research endeavors that would improve the understanding of the field of health services administration. The Commission will seek evidence that the policies of the larger unit of the University support research oriented activities.

The Commission will seek evidence of formally organized research, externally funded research projects, publications and unpublished papers. Consistent with Criterion IV, the Commission will seek evidence that faculty draw upon recent research (their own and others) in preparing educational teaching materials.

VIII. Community Service and Continuing Education

There shall be evidence of faculty participation in community service and continuing education pertinent to the field of health services administration consistent with the policies of the University.

COMMENT: The Commission will seek evidence of faculty involvement in a variety of activities which will enhance faculty professional development, as noted in Criterion V.D.

Community service is broadly construed as provision of professional services of the faculty, whether individually or collectively. Particular attention will be given to the contribution of faculty to the needs of the personal health services field, such as service to governmental agencies, voluntary, community and health care associations.

IX. Program Evaluation

A. There shall be a formal process for periodically evaluating the Program involving students, faculty, alumni, practitioners, etc., aimed at the reappraisal of program objectives and the effectiveness with which the objectives are accomplished.

COMMENT: The Commission will seek evidence of a formal system for program evaluation and documentation that the system is operational, managed and effective. There should be a process, as a component of the evaluation system, for the implementation of evaluative findings.

B. There shall be evidence that the Program considers outcome measures in relation to curricular and program objectives.

COMMENT: The Commission will be seeking evidence of objective evaluation of learning outcomes; student and alumni satisfaction; long-term study of graduate performance; commentary of practitioners; and commentary of other University faculties. (There are a variety of sources of information available, including studies of health administration curricula, certification activities of professional associations, and commentary in the health administration literature.)

Best Available Copy

26 AUG 1985

Mr. Gary Filerman, President
Association of University Programs in
Health Administration
1911 North Fort Myer Drive
Suite 503
Arlington, Virginia 22209

Subject: Cooperative Agreement No. LAC-0000-A-00-5102-00

Dear Dr. Bergman:

Pursuant to the authority of the Foreign Assistance Act of 1961, as amended, the Agency for International Development (hereinafter referred to as "AID") agrees to compensate the Association of University Programs in Health Administration (hereinafter referred to as "AUPHA" or "the Recipient") an amount not to exceed \$250,000 to support AUPHA's proposal for dissemination of information on health management and administration to the Latin American Countries as detailed in the Schedule and the Program Description, which are appended as Enclosures A and B, respectively, to this cooperative agreement.

This Agreement is effective August 26, 1985 and shall apply to commitments made by the Recipient in furtherance of this Agreement's objectives during the period beginning August 26, 1985 and ending January 31, 1990.

This Agreement is conditioned upon the Recipient's administration of funds in accordance with the terms and conditions set forth in the Schedule (Enclosure A), the Program Description (Enclosure B), the Standard Provisions (Enclosure No. C.), and Alterations to Standard Provisions (Enclosure No. D), which are appended hereto.

Please sign the original and seven (7) copies of this Agreement, and return the original and six (6) copies to the undersigned, making sure to return all copies marked "Funds Available."

Sincerely,

Wesley Hawley

Wesley Hawley
Agreement Officer
Latin America/Caribbean Branch
Regional Operations Division
Office of Contract Management

Enclosures:

- A. Schedule
- B. Program Description
- C. Standard Provisions
- D. Alterations to Standard Provisions

ACKNOWLEDGED:

Association of University Programs in Health Administration

BY: *Daniel Bergvall*

TITLE: *Vice President*

DATE: *August 30, 1985*

FISCAL DATA

Appropriation: 72-115-1021.8
 Budget Plan Code: 548-65-598-00-69-51 LDAA-85-35598-CG12
 PIO/T No.: 35651406
 Project Name: Technology Development and Transfer in Health
 Total Estimated Amount: \$999,984
 Total Obligated Amount: \$250,000
 Funding Source: AID/W
 Recipient DUNS No.: 070911433

Standard
 AUG 27 1985
 064190
 Procurement Section, Division
 OFFICE OF CONTRACT MANAGEMENT

SCHEDULE**A. Purpose of Cooperative Agreement**

The purpose of this cooperative agreement is to support AUPHA's proposal for dissemination of information on health management and administration to the Latin American Countries as detailed in the the Program Description.

B. Period of Cooperative Agreement

The effective date of this cooperative agreement is August 26, 1985. The expiration date of this cooperative agreement is January 31, 1990.

C. Amount of Cooperative Agreement and Payment

1. The total estimated amount of this cooperative agreement for the period shown in B above is \$999,984.

2. AID hereby obligates the amount of \$250,000 for the period August 26, 1985 through September 15, 1986. The Recipient is not authorized to exceed this amount without prior authorization by the AID Agreement Officer.

3. Additional funds up to the total amount of the agreement shown in C.1 above, may be obligated by AID subject to the availability of funds and to the requirements of the Standard Provision of the Agreement entitled "Revision of Financial Plans."

4. In addition to the amount shown in C.1 above, AUPHA has agreed to cost share at approximately \$120,000 which represents the difference between their authorized indirect cost rate of 40% and the 25% proposed rate for this agreement.

5. Payment shall be made to the recipient in accordance with the procedures set forth in Attachment 3, entitled "Standard Provisions", in the specific provision entitled "Payment Letter of Credit."

D. Financial Plan

The following is the Financial Plan for this cooperative agreement. Revisions to this Plan shall be made in accordance with the Standard Provision of this cooperative agreement entitled "Revision of Financial Plans."

	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>	<u>Tot</u>
Personnel Expense	\$97,800	\$103,668	\$109,888	\$87,500	\$42
Workshops/Seminars	35,000	40,000	40,000	40,000	15
Information/Networking	57,000	53,500	54,400	52,250	21
Indirect Costs	47,450	49,292	51,072	52,183	19
Total	\$237,250	\$246,460	\$255,360	\$260,914	\$99

E. Substantial Involvement Understandings

The Substantial Involvement Areas of this Agreement are as follows:

1. AID and the Recipient will jointly review the quarterly workplans and periodic revisions prior to their implementation.

2. The Recipient will review with the AID Project Officer all international travel to be performed during the course of this Agreement. The AID Project Officer will be responsible for obtaining country and Mission clearances.

3. The Recipient will review in detail with the AID Project Officer all quarterly and annual report formats.

4. AID will provide liaison between the recipient and the LAC Missions. AID will also make arrangements for midterm and final evaluations of this agreement.

5. The AID Project Officer may be contacted as follows:

Office of Health/Nutrition
Latin American/Caribbean Bureau
Agency for International Development
Attn: Project Officer (Project No. 598-0000)
Washington, D.C. 20523

E. Reports

Five copies of all reports completed under this grant are required to be submitted to AID/LAC/DR/HN, Washington, D.C. 20523. The Recipient shall submit three copies of all reports to: Documentation Coordinator, PPC/DIU, Agency for International Development, Washington, D.C. 20523, or his designee. Such copies shall include a title page showing the title of the report, copy of each report shall be clearly typed or printed on white paper so that it may be photographed to produce a microfilm master. Technical reports shall be accompanied by an author-prepared abstract.

F. Special Provisions

A. The following Standard Provisions are deleted: 5A, 7B, 7C, 10B, 12, 13A, and 20.

B. It is understood that any purchased goods and services with source, origin or nationality other than the U.S. will be subject to Standard Provision No. 10A.

G. Standard Provisions and Alterations

A. The Standard Provisions applicable to this grant are set forth in AID Form No. 1420-51⁶² (2-82), appended hereto as Attachment No. 3, and are modified as set forth in Attachment No. 4, entitled "Alterations in Grants - November 1984 Attachment to AID Forms 1420-51, and -52."

H. Negotiated Overhead Rates

Pursuant to the Standard Provisions and the AUPHA's U. S. Government approved Indirect Cost rates indirect costs at the following rates will apply to this agreement until amended.:

Provisional Rate of 40% of total direct costs less individual items of equipment in excess of \$500, all subcontracts and subgrants, alterations and renovations, stipends and tuition payments.

SPECIAL REMARK: AUPHA has agreed to cost share under this agreement by charging only 25% of their approved indirect cost rate.

II. Objectives

General Objective:

Increase utilization and application of management training for health programs in Latin America and the Caribbean.

Specific Objectives:

1. Facilitate contacts between consumers of health management training and technical knowledge, such as AID Missions and host country institutions on the one hand, and training centers and technical specialists on the other.
2. Increase communications between and among U.S. and LAC health management training centers.
3. Assist LAC health management training centers to improve the relevance, applicability, and responsiveness of training offered to LAC needs for health management skills.

III. Description of Activities

AUPHA is expected to:

1. a. Collect, publish, and distribute guides to LAC health management training resources to host country health care institutions (eg. Ministries of Health, Social Security Institutions), and health management training institutions. Distribute current edition of such directories of US health management training resources to same groups. On request, provide additional information regarding such training resources, or make appropriate referral to a source of such information.
- b. Establish and maintain an index of US and LAC specialists with health management skills.
- c. Provide up to 2 person-months of site visits per year to training institutions or host country institutions to assist in identifying and defining health management training or technical assistance needs.
- d. Assist in matching health management training and site visit needs and training programs or specialists.

2. a. Enlarge and maintain the network of LAC and US health management training institutions, and MCH's and Social Security Institutions in LAC.
- b. Annually, carry out either a region-wide workshop or a combination of smaller sub-regional workshops or topic-specific seminars. Reports on such workshops or seminars should appear in the newsletter described below.
- c. Prepare and distribute a semi-annual newsletter on health management training to the LAC members of the network. (Newsletter may be made available at cost to US health training institutions.)

3. a. Expand and maintain a reference collection of teaching materials.
- b. Make reference collection available to LAC network members by providing bibliographies on specific topics on request, responding to requests for information by letter, and by translating into Spanish and distributing copies of selected materials, including the AUPHA management assessment modules.
- c. Publish and distribute to LAC members of the network two bibliographies on health administration education.
- d. Distribute AUPHA periodicals (such as the Journal of Health Administration Education) and special reports to LAC network members quarterly. Translate summaries of principal articles into Spanish and include them in the JHAE.

**LIST OF TRAINING COURSES
IN THE U.S.A.**

Name : MR. KAMAL ISMAIL

- 1 - USA Orientation .
- 2 - Long Range Information Systems Planning .
- 3 - Management in a Changing Environment .
- 4 - Information Systems Project Management .
- 5 - Improving Your Managerial Effectiveness .
- 6 - Using Louts 1-2-3 in Business Applications .
- 7 - Symphony Software for Business Solutions .
- 8 - Alternative Methods of Export Finance .
- 9 - Basic Project Management .
- 10 - Senior project Management .

Name : MR. ADEL DAOUD

- 1 - USA Orientation .
- 2 - Increasing Registration and Revenue Through Effective Seminar Marketing
- 3 - Internship in Clemson University .
- 4 - Developing Leadership for Supervisors .

Name : MR. SAMEH ABU-LABAN

- 1 - Using Lotus 1-2-3 in Business Applications .
- 2 - Managing Systems Projects .
- 3 - Interpersonal Skills .
- 4 - Executive Communication Skills .
- 5 - Senior Project Management .
- 6 - Information Systems Project Management .
- 7 - Manager as Leader .
- 8 - Creative Thinking Strategies .
- 9 - Maintenance Management .
- 10 - Capacity Management .
- 11 - Just-in-Time .
- 12 - White Collar Productivity .

Name : MR. ALI EL-KUS

- 1 - Orientation to U.S.A .
- 2 - Data Communication/Components , System Networks .
- 3 - Data Base Structures and Access Methods .
- 4 - Using Data Base in Distributive Process .
- 5 - Effective Classroom Instructions .
- 6 - Local Area Networks .
- 7 - Data Base Administration .
- 8 - EDP Auditing and Controls .
- 9 - Computer Assisted Audit Techniques .
- 10 - Micro-to-Mainframe Links and PC Networks

Name : MR. LUTFI AL-KHAWAJA

- 1 - Orientation to USA .
- 2 - Workshop for PC Trainer .
- 3 - Using Louts in Business Applications .
- 4 - Intermediate Louts .
- 5 - Data Base/A Builders Guide .
- 6 - Relational Data Base Systems .
- 7 - Intoduction to Computers .
- 8 - Hands/on PC Networks .
- 9 - Introduction to Data Base Mangement Systems .
- 10 - Networking Personal Computers .
- 11 - Advanced Lotus 1-2-3 .
- 12 - Managing the Data Center as a Business .
- 13 - How to use Dbase-III Plus on your Computer .
- 14 - Data Base Structured and Access Methods .

AREAS OF TRAINING

A. Specialized Training Programs1. Management

Personnel Management, Human Relations in Business, Principles of Management, Communication, Delegation, Job Description, Motivation, Art of Interviewing, Staffing Procedures, Performance Appraisal, Leadership, Decision Making, Office Organization and Administration, Developing Managerial Skills, Administrative Organization, Control Systems in Banks and Financial Institutions, Management by Objectives, Office Automation, Planning, Supervision, and Management Information Systems.

2. Production Management

Production Planning and Control, Quality Control, Stock Control, Work Study, Planning Maintenance Operations, Production Management, Industrial Management, Productivity, Quantitative Methods in Modern Management, Industrial Relations and Collective Bargaining, Behavioral and Quantitative Aspects in Decision Making, Quantitative Methods in Planning and Control of Construction Projects, Factory Layout, and Productivity Measurement and Improvement.

3. Marketing

Principles of Marketing, Distribution Channels, Advertisement, Sales Management, Imports and Exports, International Marketing and Export Promotion, Purchasing Operations and Administration, and International Marketing Strategies.

4. Accounting

Financial Accounting, Cost Accounting, Financial Analysis, Financial Management, Accounting for Non-accountants, Internal and External Auditing, Accounting for Partnerships, Bank Accounting, Insurance Accounting, Financial Accounting for Corporations, Accounting for Construction

Contracts, Managerial Accounting, Management of Cash Flows and Work Capital, Accounting for Banks Operations, Accounting for Income-Tax Purposes, Managing Accounts Receivable, Using Computers in Financial Analysis, Cost Accounting, and Corporate Financial Planning.

5. Computers

Computer Audit and Security, Computer Appreciation for Managers, Data Communications and Networks, Relational Data Base Design, and Using Computers in Office Automation.

B. General Programs

Project Appraisal, Statistical Methods, Income Tax Law, Money and Capital Markets in Jordan, Shipping and International Trade, Import Methods and Customs Regulations, Basics of Insurance, Comprehensive Banking Operations Insurance, Bank Guarantees, Shipping Operations and Administration, Credit Facilities, Foreign Exchange and Money Markets, Documentary Credits and Engineering Insurance.

**ACADEMIC QUALIFICATIONS OF PARTICIPANTS
DURING 1979 - 1989**

Academic Qualifications	Year										Total	Percentage of Total
	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988		
Ph.D., DBA, Ed.D.	3	2	1	4	9	4	8	10	11	8	60	1 %
Masters Degree	5	10	12	14	18	26	27	34	52	68	266	5 %
Bachelor Degree	88	110	174	184	287	349	466	414	416	550	3038	56 %
Diploma	17	24	45	32	74	95	118	174	140	178	897	17 %
High School	23	33	59	46	56	77	176	197	127	138	932	17 %
Below High School	9	7	11	11	7	7	8	35	11	8	114	2 %
Unknown	20	74	7	-	-	-	-	-	-	-	101	2 %
Total	165	260	309	291	451	558	803	864	757	950	5408	100 %

TABLE (2)

DISTRIBUTION OF PARTICIPANTS BY TYPE OF EMPLOYMENT
DURING 1979 - 1989

Year	Administrative	Financial	Marketing	Production	Others	Total
1979	65	63	5	32	-	165
1980	73	104	40	43	-	260
1981	143	95	41	30	-	309
1982	55	185	6	45	-	291
1983	126	218	3	104	-	451
1984	139	267	5	70	77	558
1985	368	321	25	73	16	803
1986	554	216	40	36	18	864
1987	366	272	48	28	43	757
1988	639	257	16	21	17	950
Total	2528	1998	229	483	171	5408
Percentage of Total	47 %	37 %	4 %	9 %	3 %	100 %

TABLE (3)

DISTRIBUTION OF PARTICIPANTS BY ECONOMIC SECTOR DURING 1979 - 1988

Year	sectors			Government	Transport	*other Services	Total
	Industrial	Financial	Commercial				
1979	85	29	5	28	-	18	165
1980	133	83	10	11	-	23	260
1981	138	88	18	46	-	19	309
1982	99	97	8	45	-	42	291
1983	192	156	14	40	-	49	451
1984	134	213	4	140	-	67	558
1985	209	272	83	158	-	81	803
1986	67	190	60	249	262	36	864
1987	109	241	48	230	106	23	757
1988	107	253	177	337	64	12	950
Total	1273	1622	428	1284	432	370	5408
Percentage of Total	23 %	30%	8 %	24 %	8 %	7 %	100 %

* Other services include participants from: Legal firms, institutions and community colleges, hotels and tourism companies, consulting and auditing firms, cultural centers, public utilities, etc....

PLANNED TRAINING PROGRAMS

1989

<u>No.</u>	<u>Title</u>	<u>Duration</u>	<u>Expected Date</u>
1	Functions of Personnel Management	3 weeks	January
2	Accounting for Non-accountants	3 weeks	January
3	Developing Managerial Skills	1 week	January
4	Data Base Management Systems (dBase III)	1 week	January
5	Financial Analysis	2 weeks	January-Feb.
6	Developing Planning Skills	1 week	January-Feb.
7	Using Computers in Financial Analysis	1 week	February
8	International Banking Operations	1 week	February
9	Computer Audit and Security	2 weeks	February
10	Developing Organizing Skills	1 week	February
11	Documentary Credit	1 week	February
12	Project Appraisal	2 weeks	February-March
13	Computer Appreciation for Managers	1 week	February-March
14	Decision Making	1 week	February-March
15	Supervisory Skills	1 week	March
16	Planning Cash Flows	2 weeks	March
17	Using Computers in Project Management	1 week	March
18	Export Operations and Promotion	3 weeks	March
19	Management of Files & Office Automation	1 week	March
20	Management Information Systems	2 weeks	March
21	Staffing Procedures and Art of Interviewing	2 weeks	March-April
22	Comprehensive Banking Operations Insurance	1 week	April
23	Managing Accounts Receivable	2 weeks	April
24	Personal Computers Operations Skills (DOS)	1 week	April
25	Purchasing Operations & Management	1 week	April
26	Legal Aspects of Banking Operations	1 week	May
27	Relational Data Base	1 week	May

<u>No.</u>	<u>Title</u>	<u>Duration</u>	<u>Expected Date</u>
28	Management Development by Use of Self-Assessment Exercises	1 week	May
29	Shipping Operations and Management	2 weeks	May-June
30	Civil Engineering Insurance	1 week	May
31	Using Computers in Office Automation	1 week	May
32	Word Processing Skills (Word Star 2000)	1 week	June
33	Quality Control	1 week	June
34	Planning Cash Flows by Using Lotus 1-2-3	1 week	June
35	Using Computers in Inventory Management	2 weeks	June
36	Performance Appraisal	2 weeks	June
37	Credit Facilities	2 weeks	June
38	Electronic Spread Sheets (Lotus 1-2-3)	1 week	June
39	Auditing and Control in Banks and Financial Institutions	2 weeks	June-July
40	Fundamentals of Accounting & Finance for Non-Financial Managers	1 week	July
41	Computer Appreciation for Managers	1 week	July
42	Management of Files and Office Automation	1 week	July
43	Computer Audit and Security	2 weeks	July-August
44	Accounting for Banks Operations	4 weeks	July-August
45	Production and Operations Management	3 weeks	July-August
46	Developing Managerial Skills	1 week	August
47	International Marketing Strategies	3 weeks	August-Sept.
48	Data Base Management Systems (dBase III)	1 week	August
49	Foreign Exchange and Money Markets	3 weeks	August-Sept.
50	Using Computers in Project Management	1 week	August
51	Maintenance Management	1 week	September
52	Bank Guarantees	1 week	September
53	Decision Making	1 week	September
54	Budgeting by Department and Functional Area	2 weeks	September
55	Cost Accounting and Decision Making	3 weeks	September

(Continued)

<u>No.</u>	<u>Title</u>	<u>Duration</u>	<u>Expected Date</u>
56	Industrial Projects Sustainability	2 weeks	September
57	Corporate Financial Planning	2 weeks	October
58	Time and Meetings Management	1 week	October
59	Accounting of Construction Contracts	2 weeks	October
60	Relational Data Base	1 week	October
61	Planning and Organizing Word	1 week	October
62	Productivity Measurement & Improvement	2 weeks	October-Nov.
63	Performance Appraisal	2 weeks	November
64	Internal and External Auditing	2 weeks	November
65	Using Computers in Office Automation	1 week	November
66	Bank Guarantees	1 week	November
67	Personal Computers Operations Skills (DCS)	3 days	November
68	Production & Operations Management	2 weeks	November
69	Word Processing Skills (Word Star 2000)	1 week	November
70	Using Computers in Financial Analysis	1 week	November
71	Preparing Financial Reports	1 week	December
72	Banks Marketing	2 weeks	December
73	Electronic Spread Sheets (Lotus 1-2-3)	1 week	December
74	Using Computers in Inventory Management	2 weeks	December

Doc. 1019y/3.89

PROJECT DEVELOPMENT PROJECT 278-0261
INSTITUTE OF MANAGEMENT

START AGREEMENT DATE 18-Sep-84
START COMPLETION DATE 31-Dec-91
PROJECT LIFE EXPIRED 59%

	CONTRACTORS	FOR	FIL	BUDGETED	'EARMARKED	'COMMITTED'		'DISBURSED	'ACCRUED	'EXPENDED	
						1	2				3	4
CONTRACT	MESTINGHOUSE INC	CONSULTING, & TRNG.	17	1,074,926	1,074,926	100%	1,074,926	100%	424,858	10,000	424,858
TA	TIMBERBIRD	MANAGEMENT COURSE	25	186,404	21,381	11%	0	0%	0	0	0
COMMODITIES	BETA ENGINEERING	TANDON PC'S	21	NA	96,401	NA	96,401	NA	96,401	0	96,401
	FALCON COMPUTERS	APPLE PC'S	7	NA	17,947	NA	17,947	NA	17,947	0	17,947
	GENERAL COMPUTERS	IBM PC'S	7	NA	20,753	NA	20,753	NA	20,753	0	20,753
	IDEAL SYSTEMS	SOFTWARE	24	NA	4,550	NA	4,550	NA	4,199	0	4,199
	IDEAL SYSTEMS	SOFTWARE	22A	NA	994	NA	994	NA	994	0	994
	PAN ARAB COMPUTERS	APPLE PC'S	7	NA	19,642	NA	19,642	NA	19,642	0	19,642
	PAN ARAB COMPUTERS	COMPUTER MAINTENANCE	13B	NA	0	NA	0	NA	0	0	0
	SOFTLINE	SOFTWARE	85	NA	3,714	NA	3,714	NA	3,343	371	3,714
	SPECIAL SYSTEMS	COMPUTER HARDWARE	23	NA	2,050	NA	2,050	NA	1,929	0	1,929
	NONE	COMPUTER HARDWARE	21	NA	59,599	NA	0	NA	0	0	0
				225,670	225,670	100%	166,071	74%	165,228	371	165,599
STAFF	DEVELOPMENT ASSOCIATES	SPECIAL EVALUATION	22	NA	18,000	NA	15,667	87%	14,872	0	14,872
	DEVELOPMENT ASSOCIATES	MID-TERM EVALUATION	27	NA	38,514	NA	0	NA	0	0	0
					101,000	54,514	54%	15,667	15%	14,872	0	14,872
			TOTALS	1,588,000	1,378,496	87%	1,754,480	79%	864,958	40,371	825,329

1 TECHNICAL ASSISTANCE

2 PROJECT IMPLEMENTATION LETTER

3 EARMARKED: REFERS TO AN AMOUNT ALLOCATED PER AGREEMENT OF IMPLEMENTING AGENCY AND AID.

4 PERCENTAGES, EXCEPT FOR PERCENT OF PROJECT LIFE EXPIRED, RELATE TO BUDGETED AMOUNTS.

5 EXPENDED = DISBURSED + ACCRUED.