PD-ABA-838
65120

APPENDIX D

A.I.D. EVALUATION SUMMARY - PART I

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 AFR/TR/EHR
(ES# _____)

B. Was Evaluation Scheduled In Current FY Annual Evaluation Plan?
Yes [X] Slipped [ ] Ad Hoc [ ]
Evaluation Plan Submission Date: FY ____ Q ____

C. Evaluation Timing
Interim [X] Final [ ]
Ex Post [ ] Other [ ]

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)
698-0463	Human Resources Development Assistance (HRDA)	'88	9/30/95	$70 mil	$31.4 mil.

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. PSTNA Methodology will be reexamined and focus on both urban and rural sectors explored. Rural private sector credit associations and coops will receive more attention.	PIATT-LAI	6/30/90
2. Public sector training assessment methodology to be designed and training resources identified for the public sector.	PEUSE	4/30/90
3. Pairing arrangement between U.S. and African institutions will be fostered by visits to appropriate institutes such as INSET and CAMPC Abidjan, which are candidates for FY'90 "seed money" grant from core funds.	PIATT/EVERETT LAI	5/31/90
4. Selected Third Country institutions will be visited and evaluated as sources of management training in Africa.	RAULLERSON, PIATT, EVERETT, (LAI) PEUSE	7/31/90
5. New HRDA Regional Training Assistant to be hired by REDSO/WCA to disseminate information by computer systems on appropriate institutions for management training in West Africa. Similar post will be established in (REDSO/ESA) Nairobi for E. Africa.	SCHULMAN, REDSO/WCA, PEUSE, CLARKE MORIN	12/31/90

(Attach extra sheet if necessary)

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)	Judith Shampain AFR/TR/EHR	N/A	Randy Roeser AFR/TR/PRO	Richard Cobb AFR/TR
Signature	Judith Shampain		R Roeser	R Cobb
Date	3/23/90		4/18/90	4/19/90

APPENDIX D

A.I.D. EVALUATION SUMMARY - PART I

1. BEFORE FILLING OUT THIS FORM, READ THE ATTACHED INSTRUCTIONS.
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IDENTIFICATION DATA

A. Reporting A.I.D. Unit:

Mission or AID/W Office _____
(ES# _____)

B. Was Evaluation Scheduled In Current FY Annual Evaluation Plan?

Yes ☐ Slipped ☐ Ad Hoc ☐

Evaluation Plan Submission Date: FY ____ Q ____

C. Evaluation Timing

Interim ☐ Final ☐ Ex Post ☐ Other ☐

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)

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
(Continued)		
6. Design of an integrated and expanded PTMS including data on in-country, third country training and costs.	MORIN	12/31/90
7. To increase information flows between AID/W and Missions, "HRDA Update" newsletter to be issued on regular basis. More Africa-wide cables to be drafted keeping Missions informed of regional seminars/workshops, contract buy-in procedures and their advantages, mission accomplishments in implementing HRDA through innovative methods, etc.	ASHTON(LAI) BRYANT, SHAMPAIN, PEUSE	Ongoing
8. Evaluation indicators will be developed to help measure project impact on post-training job performance, increased employment and economic growth.	RENISON, PEUSE	9/30/90

(Attach extra sheet if necessary)

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)				
Signature				
Date				

V)

ABSTRACT

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

H. Evaluation Abstract

The mid-term formative evaluation was intended to show if HRDA is on the right course. It assessed progress towards attainment of purpose, the appropriateness of the management structure and project activities, particularly training for the development of the private sector, increasing training for women, and development of an automated system to collect training data. The evaluation was conducted by 3 consultants who conducted interviews, collected data in Washington and visited A.I.D. missions in 5 countries.

The Evaluation Team found the project's flexibility in offering short-term training in Africa particularly suitable to the development of the private sector and the training of businesswomen. It found HRDA responsive to emerging needs which cannot be accommodated by existing projects. In the 5 countries visited, it appeared that training of women is exceeding its 35% target. Missions have responded enthusiastically to HRDA as evidenced by the number of countries contributing and the amounts of the buy-ins. HRDA's management structure fits the demands placed upon it because it is decentralized and flexible but it places special requirements on HRDA's information and decision-making system.

The principal negative finding was that the Management Information System (MIS) has not progressed because of performance deficiencies of the contractor. Project progress cannot be reliably measured until the MIS is installed and functioning in all missions. More professional training is needed to upgrade the skills of Mission Training Officers who have unusually heavy demands placed on them for arranging in-country workshops and seminars. The evaluation recommended that professional development workshops be provided with HRDA core funds to upgrade their knowledge and skills. In addition, it recommended that funding be provided for the AFR/TR Project Manager to travel to the field to keep informed of project progress and problems and convey accurate information directly to HRDA project managers in Africa. The team suggested meetings involving LAI, other divisions of AFR/TR, AFR/MDI and WID to review HRDA communications, responsibilities, decision making and priorities. It recommended continued support to the informal sector, an important generator of employment in Africa.

COSTS

I. Evaluation Costs

1. Evaluation Team

Name	Affiliation	Contract Number OR TDY Person Days	Contract Cost OR TDY Cost (U.S. $)	Source of Funds
Frank Murray	Institute for International Research (IIR)	IQC PDC-1109-1-00-7120-00 Work Order 18	89,756	Project
Suzanne Hoben	"	Work Order 18		
Anna Kay Lee	"	48 days each (including travel)		

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

3. Borrower/Grantee Professional Staff Person-Days (Estimate) 2

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:	Date This Summary Prepared:	Title And Date Of Full Evaluation Report:
AFR/TR/EHR	3/23/90	Formative Evaluation of Human Resources Developmental Assistance

A. Purpose of Evaluation: The mid-term formative evaluation was intended to determine if HRDA is on the right course. It assessed progress towards attainment of purpose, the appropriateness of HRDA's management structure and activities, such as training for the private sector and of women and development of a computerized data system to track A.I.D. training in Africa. It was meant to stimulate dialogue, capture unforeseen issues and recommend changes to improve operations.

Methodology: Three consultants were briefed in Washington by AFR/TR/EHR and Labat Anderson, Incorporated (LAI), the prime contractor for private sector and data-base issues. They reviewed project documents, interviewed project staff and visited missions in Nairobi, Kinshasa, Dar Es Salaam, Dakar and Conakry, which were chosen for the size of their HRDA programs and their experiences to date with HRDA funded activities. They interviewed mission staff in the HRD and training offices, the private sector office and the program office; briefed or de-briefed Mission Directors in 3 countries; met with members of the Private Sector Advisory Board, staffs of development institutions and some of the participants trained under the project; observed the operation of the Participant Training Management System (PTMS) which is being expanded under the project; and interviewed individuals in both public and private sector training institutions.

The team analyzed the data, focussing on progress to date, implementation procedures, project management and training systems, and presented preliminary findings and conclusions to AFR/TR/EHR for comment and reaction, before issuing its final report in December 1989.

B. Purpose of Activity Evaluated: HRDA is intended to stimulate, facilitate and support national and regional training programs that will provide qualified technical, scientific and managerial personnel and policy planners to strengthen African institutions, enhance the growth of the private sector and increase the participation of women in development.

C. Findings and Conclusions:

1. The appropriateness of HRDA is reflected in the conclusion that Missions have responded enthusiastically. The project is responsive to private sector development and the training of women because short-term programs in Africa make training more accessible.

2. Based on visits to 5 countries, HRDA's target of 35% women appears to be attainable. In fact, it may be significantly exceeded in some countries.

3. Based on 5 countries visited, HRDA's public sector training may lack a clear focus and may not be integrated with private sector development.

4. PSTNAs have an urban bias and should be more responsive to development of private enterprise in the rural sector.

5. Project shows progress toward achievement of HRDA targets and use of innovative implementation approaches, but lags in improving communications and information flows.

6. African training institutes are being strengthened through facilitation of pairing arrangements and presentation of joint activities with U.S. institutes.

7. Use of third country training is hampered by lack of information about quality of institutions and insufficient exchange of information among Missions on institutions providing good programs.

8. PTMS installation is lagging seriously behind original schedules. HRDA management in AID/W lacks clear picture of project progress. MIS effort needs management instruments to ensure effective project team communication and agreement on goals and purposes, roles, responsibilities and costs.

9. Project administration and field training operations are hampered by insufficient flows of information from AID/W to Missions and vice versa. Reporting procedures and mechanisms adapted to HRDA's needs are lacking.

10. Evaluation indicators have not been developed to help Training Officers measure project impact on post training job performance, increased employment and economic growth.

11. Mission Training Officers require additional professional training in order to implement project activities.

D. Principal Recommendations:

1. The appropriateness of project concept should be reinforced by maintaining flexibility, continued support to Missions with project implementation and ensuring that long-term training is consonant with project purpose. Missions should be encouraged to update PSTNAs and make sure that HRDA includes priority target populations.

2. Emphasis on training of women should be continued.

3. PSTNA methodology should be re-examined and possibility of focussing on both urban and rural sectors should be explored. Rural private sector credit associations and cooperatives need more assistance.

4. Public sector training should be further emphasized and integrated with private sector development.

5. Communication and information plans should be expanded throughout the dispersed centers of HRDA activity in Africa and in Washington.

6. The possibility of more linkage arrangements with worthy institutions should be investigated.

7. Third country training information should be collected and disseminated to Missions

8. Immediate steps should be taken to create an African training management information system by developing a description of HRDA requirements, defining contractor's role and responsibilities, keying contractor performance to a workplan, budget and schedule of deliverables for MIS development and operation.

9. Increase information flows between AID/W and Missions and design reporting procedures to capture essential HRDA data.

10. Develop evaluation indicators to measure project progress and impact on employment and growth of African economies.

11. Funding should be provided for Project Manager's travel in Africa to keep informed of project progress and observe in-country training.

12. Provide additional training of Mission Training Officers, not only in operation and importance of data collection, but to provide them with skills and information needed for project implementation.

E. Lessons Learned:

1. Importance of flexibility in project designed to increase development of private sector and training of women through in-country and third country training.

2. Importance of professional skills' upgrading of Mission training officers, now faced with new challenge of developing in-country programs.

3. Importance of a Management Information System which measures in-country and third country training in order to assess progress towards HRDA goals, and of communications among Missions with AID/W on project activities.

4. Ability to achieve wider participation of special target groups such as private sector employees and women, through the provision of in-country and third country (short-term) training programs.

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.)

"Formative Evaluation Report Human Resources Development Assistance Project," by Susan J. Hoben, Anna K. Lee and F. T. Murray of the Institute for International Research, Inc., Rosslyn, VA. Dec. 21, 1989

COMMENTS

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

Comments

The evaluation shows awareness of the project's major deficiency, the 18-month delay in conceptualization of the design of an automated system intended to capture training data on 40 African countries, including third country and in-country training and training costs. The report provides a Management Information System (MIS) model (Annex D) which builds on the technical requirements in Annex K of the Project Paper, based on 18 months experience with the project. The MIS model will be useful to Labat Anderson's new Management Information Specialist for design of an integrated system.

The strongest member of the team was the Management Information Specialist, a retired A.I.D. employee, who was tasked by the IQC contractor which received the Work Order, with revision of all sections of the report, since the other team members were unavailable to revise their own sections. The team leader was a last minute substitute when the original leader was found to be unavailable. He may not have had adequate time for preparation of his assignment or the necessary interpersonal skills for gaining the cooperation of team members. A member of AFR/TR/EHR, who accompanied the team on its field visits, noted the weakness of the team leader as a possible contributing factor to the inadequacy of the draft report. The final report is an improvement, but may not reflect the consensus of the entire team.

Although the evaluation confirmed some of AFR/TR/EHR's self assessment of the project's progress, it added nothing new, except for a recommendation to inform missions of "OIT's development impact indicators" and convene a field-oriented workshop focussing on HRDA impact indicators. After consultation with members of OIT, we could find no one who was aware of these impact indicators, which still remain to be identified if they are to be used to measure future progress.

On the whole, the Evaluation Team fulfilled requirements of the Scope of Work and pointed out project strengths and weaknesses. Most of its recommendations will be implemented to increase the possibility of achieving all project goals.

XD-ABA-838-A
65921

FORMATIVE EVALUATION REPORT

HUMAN RESOURCES DEVELOPMENT

ASSISTANCE PROJECT

submitted to

Education and Human Resources Division
AFR/TR/EHR

by

Susan J. Hoben

Anna K. Lee

F. T. Murray

Institute for International Research, Inc.

Rosslyn, VA

December 21, 1989

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ACRONYMS

ABS	Annual Budget Submission
AFEG	Association of Woman Entrepreneurs of Guinea
AFR/DP	Bureau for Africa, Office of Development Programs
AFR/PD	Bureau for Africa, Office of Project Development
AFR/TR/EHR	AID Africa Bureau, Office of Technical Resources, Education and Human Resources Division
AID	Agency for International Development
AMDP	African Manpower Development Program
AMI	Atlanta Management Institute
CDSS	Country Development Strategy Statement
CESAG	Centre Africain d'Etudes Superieures en Gestion
CLUSA	Cooperative League of the U.S.A.
CP	Congressional Presentation
CTP	Country Training Plan
CTS	Country Training Strategy
DEOB	De-obligation
DFA	Development Fund for Africa
DOL	Department of Labor
DPM	Directorate of Personnel Management
EI	Entrepreneurs International
FKE	Federation of Kenyan Employers
FSN	Foreign Service National
GDO	General Development Officer
GDP	Gross Domestic Product
HRDA	Human Resource Development Assistance
HRDO	Human Resources Development Officer
ILD	Institute for Liberty and Democracy
KNCC	Kenya National Chamber of Commerce
LAI	Labat-Anderson, International
LEG	Office of Legislative Affairs
LOP	Life of Project
LSGA	Limited Scope Grant Agreement
MACS	Mission Accounting and Control System
MDI	Office of Market Development and Investment
MIS	Management Information System
NGO	Non-governmental Organization
OIRM	Office of Information Resources Management
OIT	Office of International Training
OYB	Operational Year Budget
PAIS	Project Accounting and Information System
PBDS	Program Budget Data System
PDF	Participant Data Form
PIET	Partners for International Education and Training
PIO/P	Project Implementation Order - Participant Training
PIO/T	Project Implementation Order - Technical Services
PIR	Project Implementation Report
PP	Project Paper
PPC/CDIE	Bureau for Program and Policy Coordination, Center for Development Information and Evaluation
PPC/PB	Bureau for Program and Policy Coordination, Office of Planning and Budget

PPC/WID	Bureau for Program and Policy Coordination, Office of Women in Development
PRE	Bureau for Private Enterprise
PSAB	Private Sector Advisory Board
PSC	Personal Service Contract
PSTNA	Private Sector Training Needs Assessment
PTIS	Participant Training Information System
PTMS	Participant Training Management System
REDSO	Regional Development Services Office
REOB	Re-obligation
RHUDO	Regional Housing and Urban Development Office
RSSA	Resource Support Services Agreement
S&T	Bureau for Science and Technology
SER/CM	Bureau for Program and Management Services, Office of Contract Management
SHRD	Sahel Human Resources Development
SME	Small- and medium-scale enterprises
TA	Training Assistant
TCA	Training Cost Analysis
TDY	Temporary Duty
TIP	Training Implementation Plan
TO	Training Officer
USAID	U.S. Agency for International Development
USDA	United States Department of Agriculture
USIS	United States Information Service
WID	Women in Development

EXECUTIVE SUMMARY

Purpose of Evaluation

The intent of this mid-term, formative evaluation is to determine if the HRDA project is on the right course toward achieving its purpose. The evaluation, therefore, assesses progress toward attainment of purposes and the appropriateness of HRDA's management structure and activities. It is meant to stimulate dialogue, capture unforeseen issues of importance and make recommendations that will enable the HRDA project to operate successfully.

Formative Evaluation Report

This report addresses the appropriateness of HRDA's project concept to project purposes and objectives, current project outcomes and related management issues. The report findings and conclusions are based on examples of HRDA project successes and problems observed very briefly in five countries and in Washington. Each country program has unique aspects in its implementation of the HRDA project. The report recommendations, therefore, are indicative and formative in relation to HRDA project implementation in all Africa missions.

Summary Conclusions and Recommendations

I. The appropriateness of the HRDA project concept is reflected in the following conclusions:

- Missions have responded enthusiastically to HRDA. In it Missions have a flexible vehicle that enables them to move rapidly to answer emerging opportunities that cannot be accommodated by existing projects. HRDA appears to respond to Mission desires to incorporate persons in the private sector and women; in turn, HRDA is welcomed by these target groups because its emphasis on short-term training in Africa makes training more accessible to them.

- Based on brief visits to five Missions and a review of information available, it appears that training of women is exceeding HRDA's 35% target. Private sector training seems to be concentrating on small- and medium-size enterprises, informal sector researchers and policy makers. HRDA may have an urban bias, since rural private sector institutions such as credit associations and cooperatives are not receiving much assistance.

- The project in some instances is striving to influence private sector policy decisions by targeting key public officials, but in other cases, HRDA public sector training lacks a clear focus and integration with private sector development.

Recommendations: The appropriateness of the HRDA project concept should be reinforced and supported by the following project team actions:

- Maintain flexibility of HRDA and support Missions in their varied ways of project implementation; ensure that long-term training is consonant with project purpose.

- Encourage Missions to update PSTNAs and ensure that HRDA includes all target populations warranting priority.

- Provide Missions guidance on training activities that will help small-scale and informal sector entrepreneurs gain increased access to credit, absent complementary assistance of other donors.

- Stress involvement of policy-making public officials in HRDA activities.

II. Project outcomes indicate notable progress toward achievement of an HRDA target, use of innovative implementation approaches but lags in improving communications and information flows.

- HRDA's objective of strengthening Africa training institutes is being achieved through the facilitation of pairing arrangements and the conducting of training activities through, for and with staff of the institutes.

- Use of third country training is hampered by lack of information about quality third-country training institutions and paucity of information exchange on HRDA initiatives in other Missions.

- Installation of MIS and PTMS is seriously lagging behind original schedules, with the result that HRDA management in AID/W does not have a clear picture of project progress. The MIS effort lacks management instruments to ensure effective project team communication and agreement on goals and purposes, roles and responsibilities and costs.

Recommendations: Project implementation and the development of the MIS should be supported by AFR/TR/EHR action on the following:

- Encourage Missions to continue seeking linkage arrangements for African training institutes and sponsor training activities through, for and with them.

- Make clear to African training institutes the serious commitment implied in pairing arrangements and the importance of careful selection of those chosen for long-term assignments at the paired institution.

- Develop expanded information flows throughout the dispersed centers of HRDA activity in Africa and Washington.

- Take steps to accelerate the creation of the Africa training management information system, as follows:

  - Develop a comprehensive, up-to-date description of HRDA information requirements (see Annex D); supported by a logical framework analysis, define contractor roles and responsibilities; key contractor performance to a workplan, budget and schedule of deliverables for MIS development and operations.

  - Assist Mission exploitation of PTMS: identify generic revisions to the PTMS for Africa-wide use; work with OIT, OIRM and AFR/MGT to ensure that PTMS installations include the Wang PC 280 computer or an equivalent; encourage Missions to locate the computer system where operators can have easy access for impromptu use.

- Include in project MIS activities scheduled procedures to obtain PTMS data selectively and to review the validity and usefulness of the information for HRDA project management purposes.

III. Project administration and field training operations reflect the following **management issues:**

o HRDA's management structure fundamentally fits the demands placed on it by the project. Since it is flexible and decentralized, however, it puts special requirements on HRDA's information and decision-making system. Enhanced flows of information from AID/W to the Missions and vice versa are needed, as are reporting procedures and mechanisms adapted to HRDA's special character.

o Training officers are implementing end-of-training evaluations, but indicators have not yet been developed that can be used to measure project impact on the post-training job performance of trainees, increased employment and economic growth. The skills and know how required to manage HRDA training have placed FNS training officers in positions of considerable responsibility that are critical to project success.

Recommendations: AFR/TR/EHR should address these issues, as follows:

o Use core services to develop and disseminate brief, computer-accessible evaluative directories of third-country training opportunities.

o Inform Missions of OIT's developmental work concerning impact indicators; convene a field-oriented workshop focusing on HRDA impact indicators as well as project scope, thrust and future project directions.

o Provide funding for AFR/TR/EHR Project Manager field travel in Africa to keep informed of project progress or problems and to convey information directly and accurately to HRDA project managers in Africa.

o Give high priority to the training and professional development of training officers. Continue and expand the workshops for training officers; communicate to Mission directors OIT's decision to permit upgrading of training officers to FSN 11.

o Convene a series of in-depth reflections involving LAI, other divisions in AFR/TR, AFR/MDI, and WID to review HRDA communications, responsibilities, decision-making and priorities (see Annex B).

o Continue to support creative, prudent approaches to assist the informal sector, an important generator of employment in Africa.

PROJECT IDENTIFICATION DATA SHEET

1. Country: Africa Regional

2. Project Title: Human Resources Development Assistance

3. Project Number: 698-0463

4. Project Dates:

   a. Authorized: 24 Aug 87
   b: Funding start: 01 Oct 87
   c. Final Obligation Date: FY 1992
   d. Project Assistance Completion Date: 30 Sep 95

5. Project funding:

   a. A.I.D. Bilateral Funding: 70,000,000
   b. Private Sector Funding: 645,000
   c. Host Country Counterpart funds: 5,860,000
   Total $76,505,000

6. Key Implementing Agents: Labat-Anderson, Inc.
   RSSA USDA (Peuse, McDavid)
   RSSA DOL (Renison)

7. Project Designers: AFR/TR/EHR

8. a. Responsible A.I.D. Office: AFR/TR
   b. Project Officer: J. Shampain, AFR/TR/EHR

9. Previous Evaluations: n/a

10. Project Purpose: To stimulate, facilitate and support national and regional training programs that will provide qualified technical, scientific and managerial personnel and policy planners to strengthen African development institutions, enhance the growth of the private sector and increase the participation of women in development.

PURPOSE OF EVALUATION

The intent of this mid-term, formative evaluation is to determine if HRDA is on the right course. The evaluation, therefore, assesses progress toward attainment of purposes and the appropriateness of HRDA's management structure and activities, such as training for the private sector and women, and development of a computerized data system to track A.I.D. training in Africa. It is meant to stimulate dialogue, capture unforeseen issues of importance, and make recommendations that will enable HRDA to operate successfully.

Questions Addressed

In order to accomplish these objectives, this evaluation addresses the following questions. Are project assumptions valid that HRDA training in Africa will: a) be more effective than U.S. training and will reduce costs; b) increase the numbers of women and business persons trained; c) develop awareness and skills among government leaders resulting in policy changes that promote free market economies; and d) strengthen the capacity of African training institutions, especially vis-a-vis the private sector?

Are the private sector training needs assessments (PSTNAs) and strategies helping Missions target critical human resource constraints? Do AFR/TR/EHR reviews of these serve a useful purpose? How is the role of AFR/TR/EHR altered due to HRDA being a decentralized project funded through Mission OYB transfers? Can Missions meet the increased management demands resulting from HRDA? How effective are AFR/TR/EHR mechanisms for assisting the field?

Which indicators show the project is on its way to accomplish its objectives? What needs to be done to measure project success? Which changes should be made to increase HRDA's impact?

ECONOMIC, POLITICAL & SOCIAL CONTEXT

Despite large amounts of donor aid African economies on the whole are in worse shape now than in the past two decades. High population growth and a low level of GDP growth has pushed Africa's per capita income below the 1960 level. Incomes, educational levels, living standards, and health status are the lowest in the world.

Largely responsible for Africa's deteriorating economic condition are inappropriate domestic policies and excessive reliance on public sector institutions and investment programs. Often the policy environment is unsupportive of or even hostile to economic growth. Inefficient institutions, infrastructure and services created by past public sector investments can no longer be maintained. A lack of physical, human and institutional infrastructure and inappropriate or weak policies constitute the major constraints to economic growth in Africa.

Massive urban unemployment and extensive rural underemployment characterize the African scene. The payrolls of unproductive public sector organizations are bloated, while the private sector, which is capable of growing, increasing employment opportunities and producing critically short foreign exchange, is severely inhibited by public policy that is unsympathetic towards its needs and its present and potential contribution to national income and employment.

Policy reform can give a powerful impetus to private sector activity. But the skilled manpower capable of planning and implementing needed policy changes is in very short supply. A critical shortage of skilled human resources also prevails in agriculture, economics, engineering, public health, business management, marketing and management training. African women, who are still tied to a traditional, subsistence economy and way of life, represent an underutilized resource. With training focused on the critical areas mentioned, both women and men can acquire the skills vital to economic growth.

EVALUATION TEAM COMPOSITION AND METHODOLOGY

The evaluation was conducted under Work Order No. 20, PDC- 1109-I-20-7120-00, with the Institute for International Research, Inc. (IIR), Rosslyn, VA. The members of the team are: Susan J. Hoben, social analyst and specialist in women's development; Anna K. Lee, management information specialist and program analyst; Francis T. Murray, team leader and specialist in organization development and management training.

The team was briefed in Washington by AFR/TR/EHR and Labat-Anderson Incorporated (LAI); then obtained, reviewed and studied documents relevant to the project, identified issues on which to concentrate, determined who should be interviewed.
The team gathered data, explored the project's successes, the concerns of those we interviewed vis-a-vis HRDA's implementation and likelihood of success, problem areas they could identify, and suggestions for improvement.

The team spent two weeks in Africa, visited five countries chosen for the degree of their commitment to HRDA and for differences in HRDA apparent among them; interviewed Mission staff, especially in the HRD and training offices, the private sector office and the program office; briefed and/or debriefed the Mission director in three countries; met with project actors outside of the Missions, such as members of the Private Sector Advisory Boards, staff of development institutions, and a few of the people trained in the project; observed project activities, such as the operation of PTMS, attended meetings and events and interviewed individuals in both public sector and private sector implementing institutions.

The team analyzed the data gathered, focusing on project progress to date, on the organization of its implementation and its management and training systems; then presented preliminary findings and conclusions to AFR/TR/EHR for comment and reaction.

FINDINGS

I. APPROPRIATENESS OF HRDA PROJECT CONCEPT

Since the HRDA project design intentionally departed from the previous pattern of centrally funded and managed Africa Bureau projects, a major issue for this evaluation was whether it is in fact an appropriate vehicle for accomplishing project goals and addressing the needs of the intended participants. To shed light on this issue, the team considered:

A. Project flexibility;

B. Training activities for women, private sector participants and public sector officials and;

C. The likelihood of achieving cost reduction in training.

A. Project flexibility and adaptability

As a way of attuning HRDA to the specific needs of different African countries, the flexibility built into the project appears to be very successful. The latitude accorded Missions in deciding which specific training activities to pursue in meeting project objectives has allowed individual Missions to engage in a wide variety of project activities under the HRDA umbrella, ranging from a seminar and supervised practical training in irrigation techniques for rural woman farmers to master's and doctoral degrees in management and technical subjects for mid- and high-level government employees.

In the countries visited the evaluation team also noted variations in the Mission strategy guiding the choice of activities. In at least one instance, HRDA is viewed primarily as a vehicle for offering training in support of general Mission goals as set forth in its CDSS and manifested in its total program thrust. In other Missions visited, the training manager or human resources manager sees the objectives and goals set out in the HRDA project paper as a distinct sub-set of the CDSS and implements HRDA as a project with training activities related to formal country specific goals. At the same time, there appears to be a strong commitment to emphasis on HRDA's target groups (e.g., women, business persons, key government officials) that binds the project as an identifiable regional training initiative, although the project is manifested differently in each Mission.

USAID Missions also welcome HRDA's flexibility in responding to unforeseen needs. This allows them, to move directly into training activities without the preliminaries and delay of a great volume of time consuming design paperwork. Thus, HRDA enables Mission staff to act promptly in providing training needed to complement or supplement other projects.

In visits to USAID Missions the team encountered varying mixes of local training, U.S. scholarships, and third-country training. An important assumption of HRDA is that important target groups, particularly women and business people, are best served by short-term training close to home, either in-country or in a nearby country. Training far from home or of long duration is frequently out of the question for such people. In most Missions HRDA is concentrating on short-term in-country training, which is more acces-

sible to and better fits the needs of most of its target population. In the Missions visited by the evaluation team this enables them to have notable success in attracting female participants beyond HRDA's 35 percent target.

Missions do not eschew long-term U.S. training under HRDA when it appears appropriate. One Mission chooses to send most of its HRDA participants abroad for masters, even doctoral degrees. Its concentration on long-term training is based on an assessment that those selected as participants, who are expected to be the country's future leaders, will profit greatly from the broadened perspective on private sector potential which they will acquire in the course of their long-term training experience.

The generally positive host country interest in HRDA, a phenomenon not unknown when projects offer opportunities for training, also indicates that the training provided by HRDA is considered useful and appropriate to national needs. Enthusiasm for it was particularly striking in two of the Missions visited, where it was receiving greater local press coverage than more expensive projects. In another instance HRDA was receiving "mixed reviews;" government officials were apprehensive that it might be running counter to centralized human resource planning, while individuals most involved in private sector development welcomed it.

B. Training for Women

A number of different approaches are proving effective in reaching out to women: one Mission, advertising for self-designated candidates, simply stated that women were encouraged to apply; others ran workshops, seminars, or training courses specifically for women; and some worked through contacts with local women's organizations. In some countries women hesitate to sign up for training with men, but circumventing this constraint has not been difficult. Even in countries where few women have progressed very far through the formal school system, workshops taught in local languages are providing training destined to stimulate women's income generating activities. One Mission visited, which is concentrating almost exclusively on long-term training, was able on the basis of merit to select 49 percent female candidates, mostly unmarried young women, who, in that society, are as free as their male counterparts to spend time abroad.

Training for women under HRDA appears to be a resounding success, judging from the evidence provided to the team by USAID training offices. These missions have taken the mandate to train women seriously and have undertaken a broad spectrum of activities to reach them. In some Missions training for women has reached down below the level of the few with secondary or university education and is providing training courses in local languages for rural agricultural producers. In addition, women with higher levels of education, who often are left out in competition for scholarships, have responded enthusiastically to training opportunities.

All the Missions visited have been easily exceeding the 35 percent target set by the HRDA project paper. AID/W WID's office has a matching fund for training of women that could supplement HRDA-funded activities, but so far HRDA project managers in the Missions and in Washington have not applied for them.

C. Training in the Private Sector

The private sector comprises a range of institutions and individuals with varied training needs. Different forms of training available through HRDA fit the needs of small and medium scale enterprises, informal sector activities, and cooperatives or credit associations which facilitate private sector development:

SMEs: It has proved relatively easy to locate owners and managers of SMEs, the main target for training identified in the PSTNAs, in countries where private enterprise development is permitted. Chambers of Commerce and Industry have been a good resource both for locating training appropriate for the private sector and for finding candidates for training. Employers' associations as well as local training institutes have served as vehicles for in-country training. For small and medium scale entrepreneurs, U.S. study tours provided by Entrepreneurs International (EI) funded by HRDA and arranged through OIT have had strong appeal. A perceived shortcoming is that the scale of operation of the "small" American firms visited may be larger than that of most African participants. It was suggested by one Mission that study tours to observe African firms in neighboring countries might, in some cases, be equally interesting to the participant and even more beneficial. Although typically these opportunities are available to only a few trainees, such training can act as a strong catalyst.[1]

Informal sector: It appears harder to locate informal sector trainees and to provide them with training, especially if they live and work outside urban centers. Some Missions have provided in-country seminars and workshops for informal sector producers and traders either in basic accounting and management, crafts production or agricultural techniques. Two core-funded regional conferences in Abidjan and Nairobi, whose theme was the informal sector, were followed up with training for researchers and policy makers at the Institute for Liberty and Democracy (ILD) in Peru. These conferences represent an innovative HRDA-sponsored approach to strengthening the informal sector by addressing related policy and institutional issues.

Cooperatives and credit associations: In the four Missions the team visited little or no training was being offered locally to assist cooperatives or credit associations. In Niger CLUSA has conducted an area wide HRDA training seminar for cooperative leaders. And there has been a regional workshop on credit, conducted with the help of ARIES, in Arusha. Training in accounting or in negotiation, aimed at preparing micro-or small-scale entrepreneurs for negotiating commercial loans, has met with some success. Services and training for loan applicants and loan officers are not yet much in evidence.

D. Training in the Public Sector to Promote Private Sector Development

Public policy concerning the private sector largely determines what type of training can appropriately support entrepreneurial development. Training of public sector policy-makers who can influence development of the private sector is an important aspect of HRDA. Since locating and training public officials is less problematic for USAID Missions than gearing up to find and train private sector participants, the main focus of HRDA documents up to now has been on private sector training. At least one Mission,

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[1] A rubber goods manufacturer in Zaire, for example, returned from an EI study tour with ideas for new products to manufacture to replace imported gaskets and similar parts needed locally. He had learned about new and appropriate ways of manufacturing rubber parts more efficiently and had established links with U.S. manufacturers. He was also seeking new contacts among fellow manufacturers in Zaire to explore new markets for rubber products. A cosmetologist who had visited cosmetics suppliers and training schools in the U.S. was planning not only to expand her business but to open her own training institute in Kinshasa.

however, has felt the need to contract for a six week Public Sector Training Needs Assessment to complement an HRDA core-funded Private Sector Training Needs Assessment.

In a centrally planned and controlled economy, like Tanzania's, there may be benefits to first targeting civil servants for training. The Mission there has decided to focus more initial attention on public sector training of a type that will result in private sector development. What counts is that HRDA training address critical bottlenecks to the growth of small- and medium-scale enterprises (SMEs), informal sector activities, and cooperative production and credit.

E. Cost Reduction

In-country training obviously lowers participant transportation costs and reduces living expenses for trainees. It may also effect savings in the cost of trainers. If however expatriate experts are brought to Africa and training materials have to be procured for African institutes, the savings will be offset at least in part.

Cost comparison of African training with overseas training can be a complex exercise. The data to make such a comparison are too incomplete for this evaluation to determine whether HRDA is actually achieving a reduction in training costs. Such data should flow into AFR/TR/EHR in time for the next evaluation to address this issue.

The strengthening of local training institutions is an important step in achieving cost reduction and sustainability of activities initiated by HRDA. One Mission does this by giving these institutions business - contracting with them to run training courses, including some incidental training of trainers, or providing them with students on scholarships. Trainees or their organizations are often capable of making a contribution to costs. At another Mission, however, HRDA provides virtually full funding for a training course to an employers' association which, at the same time, was contributing substantially to the costs of similar training programs being conducted in conjunction with the Mission's private sector office.

II. Project Outcomes

In a project comprising activities so geographically and organizationally dispersed as HRDA, progress is not easily tracked. Africa Bureau resources are inadequate to monitor Mission HRDA activities on the spot; comprehensive evaluation studies would take several months apiece in Africa. Without means to be thoroughly informed on activities extending over 27 countries, AID/W managers cannot verify that HRDA is on track and moving in the right direction.

The evaluation team had time to make only brief visits to five of the Missions participating in HRDA. The results they were able to observe are reassuring. Each of the USAID Missions visited was actively engaged in pursuits appropriate to the project. Moreover, each promptly produced activity records to show the team that it was keeping good track of its participants, training activities and related business, although these records were not being relayed to Washington. These records have supplemented our interviews in arriving at the following findings.

A. Strengthening African Training Institutions

An assumption underlying the HRDA goal of strengthening regional training institutions is that they can give more appropriate training to Africans than can U.S. schools and do so at a lower cost. The project paper called for a study to determine which training and technical assistance activities, carried out in coordination with other bilateral and regional training programs, could serve to strengthen African universities and training institutions. When HRDA was authorized, a decision was made to defer the element of the project related to strengthening of African training institutions until after the second year of the project, pending a consultants' study to determine the most effective ways the project can assist African training institutions.

Nonetheless HRDA activities have been strengthening African training institutions in two ways: a) by facilitating linkages or pairing arrangements between African and American schools; and, b) by conducting HRDA training activities through or in conjunction with African training institutions.

HRDA has assisted in the development of pairing arrangements between CESAG and the Wharton School, the University of Dakar and Tulane/Morehouse, and Ghana's MDPI and California Polytechnic, Pomona. Unfortunately, in one of these instances the African staff member chosen for training in the U.S. was not retained by his home institute.

Some of the regional workshops staged under HRDA have served as vehicles for training the staff of African institutions. One example is MSI's entrepreneurial skills workshop for trainers from ten African countries. Not only did it result in enthusiastic evaluations from the participants trained, but MSI has subsequently been invited to conduct this workshop in individual African countries. In these follow-up workshops the trainees of the regional workshop are co-trainers alongside MSI staff.

B. Support for Development Institutions

A major objective of HRDA is to provide support for various types of development institutions. These include:

- training institutions, both regional centers for third-country training and local schools and institutes providing in-country training;
- the government ministries responsible for setting and implementing development policies; and
- banks and credit institutions that supply financial support for entrepreneurial development.

HRDA direct assistance for strengthening training institutions was not observed at Missions visited by the team. Some USAID training offices support local training institutions by paying them for services.

Assistance to government agencies or policy-setting ministries is in the form of training for key personnel, through:

- seminars, conferences or study tours for high-level officials;
- workshops for mid-level civil servants; and

training of ministry training officers.

The extent of this type of support depends on the thrust of a particular Mission's HRDA activities. In one Mission the HRDA training officer, after targeting for training seven government agencies that have impact on the private sector, has undertaken a two year program to train the training officers in each of the seven.

C. Increased Use of Third-Country Training

USAID/Senegal, a major receiving Mission for participants sponsored by other Missions in Africa, has thoroughly organized procedures to head off or deal with myriad problems and logistics that burden the host of 100 third-country trainees a year. With HRDA core funds, USAID/Senegal can acquire a person to administer a contract to manage third country training operations. USAID/Nairobi may also receive similar funding when the numbers of third country trainees so warrant.

Core funds also have been provided to REDSO/WCA in Abidjan to hire a regional training officer for the HRDA project. The person in this position will be expected to assist Missions in identifying existing courses and helping design tailor-made courses, based on USAID Mission needs. at national and regional training institutes.

Third-country training still poses problems for Missions hampered by lack of information about training facilities elsewhere in Africa. Placing candidates for third-country training is fraught with heavy paperwork and logistic problems. Where information or procedural guidance is not available, training staff workload is increased by multiple cable exchanges seeking information on course availabilities.

A good start in using third-country training is seen in Guinea. The training officer there has considerable experience with regional institutions and feels comfortable in sending trainees to Senegal or Ivory Coast for particular courses. In other Missions, however, training staff pointed out that available catalogues from training institutions are inadequate guides to place trainees, since they lack information regarding the quality of courses, the type of living and study conditions, and timing of course offerings. Africa-based training apparently creates more work for the USAID staff than U.S. training does.

In Tanzania, Mission staff and prospective trainees prize highly the prospect of a training experience outside of their own country. They consider this a choice opportunity to observe private sector-oriented economies at work, even while they are sensitive to the potential inconveniences or comparative shortcomings of third country training experiences in Kenya or southern Africa.

D. Improved Africa Bureau Training Management Information System

1. Scope of MIS Component

To date, the primary MIS developmental effort addresses PTMS installation and training. During FY 1989 fourteen HRDA Missions received updated PTMS systems with brief training by LAI consultants. The installations provide Africa Missions with the same version of PTMS and, in many places, the hardware configuration includes a Wang 280 PC. The on-site orientation has given the training office staff practical experience and time to become accustomed to the system with a computer specialist readily available. The work of

the LAI consultants is commendable for making accessible to Mission training offices a usable information management tool.

The LAI effort to design and develop a computer-based MIS for AFR/TR/EHR apparently was scheduled to begin in the Spring of 1989. LAI documentation contains a March 1989 schedule for design and implementation beginning that month. Subsequently, an LAI document dated September shows a schedule for MIS design and implementation beginning October 1989. The LAI MIS coordinator resigned from the project in September 1989.

Data analysis materials in LAI documentation indicate the effort to create an MIS for the Bureau training program would draw primarily on PTMS for data, pending investigation of other computer-based systems as additional data sources. This approach apparently limits the scope of MIS applicability to the development of computer-to-computer data transfers and the creation of a database with user-friendly report generation procedures.

The MIS project thus far has not defined priority information needs, does not locate data sources for such needs and does not seek ways to move information from sources to users via the most practical means of communication with minimum workload impact. Notwithstanding the HRDA project requirement that an MIS immediately be designed to produce data for current use, the LAI progress reports contain no record of work in these areas.

2. Implementation of HRDA MIS

The HRDA project has been operational for eighteen months yet the MIS portion has no formalized goal-setting mechanism and operates without mutual agreement between the entire project team and the MIS contract staff on the purpose of MIS development work.

There is no conceptual framework to guide the planning of MIS activities over the duration of the HRDA project.

HRDA lacks agreed benchmarks to measure achievement of MIS objectives. Progress to date is measured only by the number of PTMS installations and training provided to field missions.

The coordination activities are not clearly delineated between the contractor and AFR/TR/EHR division staff. Documentation provided by the contractor indicates that capacity to manage HRDA MIS work is absent. By default, a member of EHR staff takes the lead to identify MIS developmental activities and performs information-gathering and reporting tasks that clearly are products expected from contract performance.

The costs for MIS development and implementation have not been recorded in terms of HRDA expenditures, either actual or projected. HRDA project management lacks an important tool for resource allocation decisions.

Apart from a schedule of prospective TDY visits to follow up on PTMS training, MIS operations seem to be performed, ad hoc, based on field reports of LAI computer training consultants and cables from Missions. The HRDA project team lacks important progress data on field training activities and does not know when or what data will be forthcoming in the near term to satisfy their most pressing information needs. The terms of the core services contract indicate the project team should rely on the contractor to obtain and process data for project management purposes.

3. PTMS

The Participant Training Management System (PTMS) was originated by OIT, designed and programmed by OIRM, to serve as a Mission-level system for participant training information storage and retrieval. It was envisioned to become a management support system insofar as automated procedures could replace paper-based program planning, participant processing, monitoring and follow-up activities.
To date, twenty seven Africa missions have the PTMS system operational on Wang computer systems. The evaluation team visited three Missions where PTMS is operational for data entry and for standardized reports. Training assistants at these Missions demonstrate a comfortable working relationship with the data entry system. They describe and analyze problems from individual experiences. They recognize the usefulness of the PTMS data collection and also recognize dBASE III training as a means to strengthen their ability to get answers for people asking questions about trainees. In sum, three training offices are involved and interested in PTMS as an operational tool and seem ready to explore its capacity to support Mission-specific needs.

A particular need mentioned by training officers is a separate PTMS procedure to handle information on in-country training. This implies AFR/TR/EHR staff, LAI MIS coordinator and OIT/OIRM analysts should consider the differences as well as similarities between U.S. training and in-country training in defining PTMS data requirements.

OIRM is responsible for the design, development and maintenance of PTMS software, including versions in dBASE III and Foxbase. The latest PTMS release is dated October 1988. Installations at Africa missions include Friendly Finder software as well as the October 1988 release of PTMS.

Many PTMS systems in Missions are installed on Wang PC 280 or equivalent computers which give good processing turnaround for data entry and most other procedures. Unfortunately some PTMS systems are on Wang VS machines and these are slow and frustrating to training offices where the VS machine takes too long to produce outputs for ad hoc information requests. Where access to the computer is limited by its location in personal workspace or by multiple users, PTMS use quickly is curtailed.

One mission visited by the evaluation team has not yet installed PTMS, hindered by the inadequate computer hardware and lack of staff in the training office.

At least three Missions are operational for day-to-day PTMS data entry. Information in those systems is probably good test data for central access and for prototype test analysis.

E. Returns from Training

Do the content of HRDA training and the learning methodologies it employs fit the needs and learning capabilities of trainees? Will it make them more productive workers and will they find work or run businesses where the know-how and skills they have acquired will contribute to economic development?

We know at this stage that some HRDA supported training programs are using a variety of learner-centered methodologies, to which trainees are responding in a very positive manner. An example is the MSI conducted workshops on entrepreneurial skills mentioned above. Training officers are using end-of-training evaluation sheets to feedback on courses from trainees. This will help them to determine how appropriateness the training is. But they need to go beyond this and develop mechanisms for determining how much impact training is having on trainees' subsequent job performance and employability.

Effective training alone will not result in improved economic performance and growth. Another requisite is a legal and regulatory context that permits private enterprise to thrive. In the few countries the team visited, government receptivity to private sector activity and encouragement for it runs the gamut from serious resistance and widespread corruption to recent lifting of restrictions on the private sector and concrete efforts to stimulate private enterprise. The economic endowments, infrastructure and stages of development of African states is equally varied. Consequently, their capacity to absorb intensified economic activity is bound to differ.

The issue of whether HRDA trainees are translating what they learned into productive activities falls beyond the scope of this mid-course formative evaluation and will be addressed later by impact evaluations. The question for future evaluations is whether HRDA project managers, on the basis of the PSTNAs, have succeeded in selecting and putting into motion a country-specific mix of activities adapted to specific niches of opportunity amid these differences. If indicators that lend themselves to measurability of impact can be identified now, clear benchmarks will be available for future evaluations.

III. PROJECT MANAGEMENT ISSUES

HRDA has shown indications that it is on track and successful. The high level of Mission buy-ins indicates enthusiastic endorsement of the project. Private Sector Advisory Boards are in place in most Missions and, in some Missions, are performing excellently. Large numbers of participants are being trained in Africa as well as the U.S. in short-term programs that bear some indication of being successful. And Missions appreciate the guidance and assistance being provided by AID/W. HRDA's management structure and its functioning deserve part of the credit for this success.

Management of a regional project being implemented by distant Missions whose staff is of modest proportions is no simple task. It is one that becomes formidable in the case of an innovative, open-ended project like HRDA, which has been purposely endowed with a decentralized, rolling design to be able to exploit emerging opportunities and needs. Without attentive management a decentralized project can deviate from its original goals and parameters, in effect becoming fragmented. Understandably HRDA management has asked the evaluation team to scrutinize its management structure and processes to determine whether these are equal to the demands of guiding and controlling the project.

A. Impact of Decentralization

With the Missions' enthusiastic response to HRDA, reflected in a surge of project buy-ins that may require a project amendment to authorize an increase in LOP funding from the $70 million now authorized, core funds now represent no more than 14% of HRDA funding. A willingness to break new ground in order to provide a more flexible, appropriate response has very definitely shaped HRDA into a decentralized project.

Normally with any move towards decentralization, the locus of decision- making is shifted and new responsibilities are thrust upon people. This implies realignment of information flows, a modification of reporting and review procedures, a need to redefine and clarify responsibilities, and necessitates at times the establishment of a transition organization to ease management's adjustment to new demands and tasks. Not surprisingly decentralization breeds more problems than can be anticipated. HRDA has not been immune to this phenomenon. Among the concerns that have surfaced are the following:

Missions are saying that they need a better understanding of HRDA and of the type and extent of core services available to them.

Communication and collaboration between HRDA and other sectors in the Missions, within AFR/TR and between HRDA and MDI and WID needs further development.

In one mission there is a feeling that AFR/TR/EHR reviews of HRDA field reports and documents are not being done seriously and by the right people.

In the ranks of AID/W we have found perceptions that:

HRDA may not be sufficiently linked to the overall strategy of Missions;

Adequate data are not available on which to base the determination of training targets warranting priority;

HRDA is giving little attention to management training needs in agriculture and health.[2]

HRDA is neglecting the training of the staff of rural cooperatives and financial institutions which provide credit to the private sector;

HRDA's success and rapid expansion is imposing an excessive burden on Missions; Indicators that will permit a valid evaluation when the time comes to measure HRDA impact have not yet been developed.

It is healthy that such concerns are surfacing. They indicate that HRDA's management system is getting information it needs to make the adjustments inevitably required in a dynamic, flexible, decentralized project.

Adequate, accurate information is the foundation of healthy organizations. Sound decision-making is where they prove their strength. HRDA's information and decision-making system has fallen short primarily in the time that has transpired before effective action was taken to remedy the delay in MIS installation. A delayed response of this sort is symptomatic of a flaw in management processes warranting attention and appropriate remedial action.

Part of the remedial action is to tighten up reporting and review procedures. AFR/TR/EHR would be mistaken in assuming that the mode of operation satisfactory for managing centralized projects can be adequate for an HRDA. Detailed and timely reports from Missions and LAI are required for overall project coordination.

By the terms of its contract LAI is obliged to submit semi-annual reports. The first two "semi-annual" reports were produced at nine and fifteen months after start-up, the second mainly a copy of the first with a few added sentences or paragraphs updating it. Both were general in nature, giving, for example, the topics of African conferences organized by the contractor with no details about attendance, agenda, or costs.

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[2] USAID agricultural projects have trained more than 1300 participants to the graduate level, most of whom now occupy responsible management positions though they have never had management training.

If LAI had submitted timely reports summarizing and evaluating progress and these had been reviewed with AFR/TR/EHR, with a written record of decisions made at or subsequent to the review, the MIS installation delay could have been appreciably shortened.

B. Start-up Actions in Missions

Most of the five Missions visited were on track in requesting and obtaining help from core services for preliminary planning. All have engaged in goal-setting and have established Private Sector Advisory Boards (PSABs)[3], whose composition and purpose varies from one country to another. Some draw mainly on public sector officials, others on individuals from the private sector. At least one is relegated to an annual, largely pro forma advisory meeting, while others meet weekly and dedicate considerable personal time to goal definition or to candidate selection for the project.

HRDA project managers are using their discretion in assigning specific roles to the PSABs, in some Missions finding them an invaluable resource in carrying out their duties, in others keeping them at arm's length to avoid suspected political influences on project decisions.

All the Missions visited had some form of computerized data-base in which they keep records for HRDA. Most had PTMS installed.

C. Core Services

USAID Missions buying into HRDA have been provided with support and technical assistance from AID/W and its contractor responsible for providing core services. These have included:

Preparation of or assistance in preparing planning documents: notably a PSTNA and a Country Training Plan;

Organizing conferences dealing with topics appropriate to HRDA;

Training of HRD office staff at regional workshops;

Installation of PTMS, development of an MIS, and support for both;

Facilitation of the hiring of additional Mission staff to deal with the workload HRDA has created;

Information and support for placing participants in third-country training institutions or U.S. schools;

Assistance in forming linkages between African and U.S. training institutions;

Communication links between the Missions and AID/W and networking between the different African Missions engaged in HRDA activities.

For training to have impact on the private sector, where AID/AFR is only beginning to acquire experience, it needs to be based on a sound assessment of training needs. For this reason Private Sector Training Needs Assessments (PSTNAs) are a basic and critical core service. By the end of September 1989, LAI, the HRDA contractor, had completed 18 PSTNAs for Category I and Category II Missions, employing for these its own staff,

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[3] Tanzania's is called a Selection Advisory Board.

consultants, and TR/EHR personnel. Nine Country Training Strategies had also been developed or revised by LAI or USDA/RSSA assistance.

LAI has also organized six regional seminars during the first two years of project life. The topics have aroused widespread interest and enthusiasm. The ARIES workshop on credit, the CLUSA seminar on cooperatives, the MSI workshop on entrepreneurial skills, and the two conferences on the informal sector have generated follow-up activities. These activities, some of which focused on policy-level issues, have been a welcomed and successful part of HRDA.

Poor communication between Washington and the field and between HRDA Missions in Africa has led to needless difficulties. The team has found that Mission staff were frequently ill-informed about core services and about AFR/TR/EHR's information needs or expectations. Usually they see no difficulty in supplying needed data; they simply don't know what is needed.

In some Missions we found creative and practical solutions to problems such as project team-building, candidate screening, or the establishment of impact indicators, which others continue to wrestle with. Inter-mission communication would allow successful techniques to be disseminated to others.

D.Target Populations and Private Sector Training Needs Assessment (PSTNA)

The PSTNAs follow a standardized format, reviewing the economic and employment situation of each country, analyzing the problems of the private sector and its management training needs, and indicating other donor activity. Those who carried out the studies used both written sources and personal interviews to gather the data on which they base their conclusions.
The teams who did the studies not only consulted the CDSS, they also talked with the AID Mission director in each country in order to bring themselves up to date on the Mission's private sector objectives and priorities. On this basis they were able to focus on appropriate target populations.

Despite time constraints, the PSTNAs have been competently done and provide a good grounding for the launching of training activities, especially with respect to SMEs and business associations and support organizations.

Since HRDA can be used for a multitude of needs important to private sector growth, HRDA managers have to make decisions choosing where to focus project resources among the many competing needs and opportunities. The PSTNA studies, which pinpoint the prime targets for HRDA, furnish an invaluable service in throwing light on a hitherto relatively unknown private sector in the 27 African countries.

The economies of most African states are anchored in rural production. It is surprising therefore that most PSTNAs concentrate so strongly on the urban private sector and what goes on in urban areas, particularly the capital city. Of the seven groups pinpointed by the PP as eligible participants in "private sector training," four get very little attention in the PSTNAs. These groups are:

> "staff and members of rural cooperatives and rural credit unions"
>
> "public sector officials responsible for policy decisions affecting the private sector"
>
> "staff of financial institutions which provide credit to the private sector"

"educators and trainers responsible for management and skills training for private sector HRD."

In part this is understandable, dictated by the availability of training facilities in the capital city, its position as the hub of commercial and industrial activities, and the need to launch HRDA in an accessible area before expanding into the countryside. Partly, too, it may be due to directives the PSTNA teams were given by Mission Directors to align HRDA with Mission objectives, priorities, and private sector strategy. Still we have been struck by the discrepancy between many of the PSTNAs and the orientation of the PP and AFR/TR/EHR. It prompts a concern that some of the PSTNAs are not targeting groups warranting priority.

In the Missions visited the evaluation team also noted a case where the training officer expressed only mild interest in his own PSTNA, and another where the HRD officer was surprised once apprised of the short-term training implications of a PSTNA strongly endorsed by the Mission.

How is such discrepancy and incomplete assimilation to be explained? We have seen indications that the following forces are at work here:

An incomplete understanding, in some Missions, of HRDA's target population and scope;

Despite their efforts, the consultants doing the PSTNA studies did not always succeed in integrating their findings with the views of Mission staff;

AFR/TR/EHR's leniency in reviewing and approving each Mission's PSTNA, which may be justifiable in the early stages of a project;

Missions exercising what they feel is their prerogative to have the final word in a decentralized, flexible project funded with their own OYB.

The discrepancy noted by the evaluation team may be more apparent than real. The four groups seemingly neglected by HRDA could be participating in a bilateral AID project or projects of other donors.[4]

Certainly the needs identified in the PSTNAs are legitimate ones. Nonetheless, when resources are limited, it makes sense to concentrate them on critical targets that can have a multiplier effect. In countries where agriculture and the rural scene are given high priority in the CDSSs, this priority is not generally reflected in their PSTNAs. NGOs and cooperatives are well deployed in rural areas and are capable of playing a key role. Along with credit institutions and government policy planners, they often spell the difference between life and death for private enterprise and merit careful consideration in follow-up to the PSTNAs and the private sector training strategies.

The PSTNAs are multi-year strategies. But in a pilot project - and HRDA though succeeding is still at the pilot stage - strategy adjustments are both possible and desirable. LAI, in reporting "little PVO or NGO participation in regional conferences," shows awareness of this issue.

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[4] PSTNAs describe the activity of other donors which is related to HRDA.

E. Needs of Training Officers

A distinctive feature of HRDA project design is the delegation of management responsibility for Mission HRDA activities to the Training Officer in each Mission. HRDA implementation optimally calls for the skills of a field program manager experienced in project development and implementation as well as training program management.

The experience of some Mission training offices show blossoming leadership and creativity to undertake expanded responsibilities, to negotiate and coordinate activities with Mission and host country officials and to assimilate multi-faceted program objectives as their own. Typically, the transition is supported by a Mission's high-level interest in its HRDA program and by a PDO or HRDO with a collaborative, participatory management style, who tends to delegate authority commensurate with responsibility and facilitates intra-mission dialogue as needed.

HRDA activities clearly place a demanding workload on training office staff. In addition to the usual task of placing candidates in familiar training programs, the training office has to set project objectives, develop public and private sector training needs assessments, formulate country training strategies, create new training programs, handle logistics for in-country HRDA training (such as AID/W processes through contractors for U.S. training) and process large numbers of candidates for selection to a greater variety of training experiences than in the past. The workload is constant and heavy year-round, no longer relieved by the breathing spells of training programs scheduled by the school year. And now there is the expectation that HRDA training offices will lead follow-up and monitoring activities.

HRDA is demanding of training officers that they assess the capabilities of in-country training institutions, and that they insure a proper fit between a trainee's needs and learning capabilities and the content of courses and of learning methodologies used in them. They are also confronted with the challenge to establish mechanisms and define indicators to base an evaluation of the impact of training on subsequent job performance.

HRDA enables Missions to handle predictable increases in workload by providing core funds to acquire contract resources. However, this approach is constrained by Mission and/or Embassy ceiling limitations on FSN staff.

OIT has established that training officer positions may be upgraded to FS-11 wherever the level is justified by program requirements. This information can be used to open a possible barrier to HRDA implementation, but is not known in Missions visited by the team.

AFR/TR/EHR incorporated training relevant to HRDA into two recent Training Officer workshops in Africa funded by OIT. While training officers expressed great satisfaction with what they learned at these workshops in Abidjan and Gaborone, they also clearly indicated to the evaluation team their need for further training and the development of skills requisite to their management of a complex and extensive HRDA training system. They definitely need help in the difficult task of finding indicators to measure training impact.

F. Impact

This evaluation focuses on analyzing the process of HRDA operation, rather than its impact. But a critical part of the process is establishment of indicators that will be used in the future to measure impact. The project design does not offer clear guidance in this respect, and a project as protean as HRDA does not fit easily into a single mold. How, then, can project managers prepare for future evaluations?

It is not too soon to determine indicators of project accomplishment that can be used later on for evaluation. Otherwise good data may be inaccessible when the time comes to evaluate project impact. Certain input and output indicators are defined by the project paper: percent of males and females trained; proportion of public and private sector trainees; local training costs compared with the same costs for overseas training. USAID Missions seem to be keeping good track of these indicators, although there are significant gaps in data transmission to AID/W.

Tracking such input and output indicators will tell evaluators whether the project is reaching the intended participants and whether it is managing to do so at a reduced cost. But it will not provide any basis for determining how much of a difference training has made to job performance, much less how much improved job performance has contributed to economic growth. To determine the impact of training a performance indicator, identified or established prior to training, has to be measured before and after training.

Since a key feature of HRDA gives to Missions discretion to shape project activities to country-specific needs and conditions, indicators of effectiveness will not be identical in all countries. So each HRDA Mission needs to focus on identifying measures of its own success. The evaluation team found that some Missions were concerned with how HRDA might be judged; some were puzzling over the issue; and one had embarked on participatory goal-setting exercises to develop satisfactory indicators.

Another Mission found in the instruments for candidate selection that had been developed by their advisory board a source for developing measures of success. They see that questions such as: "Is this candidate in a position to offer training to others? to influence policy?" can be turned into post-training measures of impact.

The Burundi Mission's private sector training needs assessment, prepared by MSI independently of HRDA, shows how business performance can indicate the relevance and impact of a training program. If, however, the main thrust of HRDA is to support Mission strategy objectives, indicators of macro impact will have to be derived from Mission program goals.

The Office of International Training has been compiling a set of possible indicators of private sector training impact, such as increased income, increased investment, increased employment generation. Distribution of this list to HRDA Missions would help Mission managers to identify indicators appropriate to their own HRDA activities.

CONCLUSIONS AND RECOMMENDATIONS

I. Appropriateness of HRDA Project Concept

Conclusion # 1: The flexibility built into HRDA has contributed to project success. Missions have been able to respond rapidly to emerging opportunities and shape project activities in accord with each country's economic and political conditions. HRDA with its emphasis on short-term training makes training more accessible and is welcomed by target groups such as women and business persons. HRDA also fits the strategy of Missions whose situation and priorities call for long-term training.

Recommendation:

Maintain flexibility of HRDA and support Missions in their varied ways of project implementation, while ensuring that long-term training is consonant with project purpose and not used as another scholarship program.

Conclusion # 2: In four countries visited, **training of women** is meeting, even exceeding, HRDA's 35% requirement, thus responding to a pent-up demand for training in countries visited by the evaluation team.

Recommendation:

Make known the availability of matching funds from WID to supplement HRDA funding for training of women.

Conclusion # 3: HRDA **private sector training** is concentrating on the urban sector and SMEs. The informal sector is being addressed primarily through research and dialogue on policy reform. The rural private sector, credit institutions, and cooperatives are participating appreciably less in HRDA, even in some countries where the Mission CDSS gives top priority to agriculture and agro-business. There is some indication that certain groups qualified to receive HRDA training are not being given the attention they warrant.

Recommendations:

Update PSTNAs to ensure that HRDA is not neglecting target populations warranting priority.

Provide Mission training offices with guidance on training activities that will help small-scale and informal sector entrepreneurs gain increased access to credit, absent complementary assistance of other donors.

In follow-up to the PSTNAs the deliverers of core services in conjunction with Mission staff should consider the desirability of expanding HRDA activities to target groups which have gotten little attention to date, such as those in rural markets and the informal sector.

Conclusion # 4: Some Missions are systematically striving to influence private sector policy decisions by targeting key public officials, for others, **HRDA public sector training** lacks a clear focus and integration with private sector development.

Recommendations:

Stress involvement of policy-making public officials in HRDA activities.

II. Project Outcomes

Conclusion # 5: HRDA's objective of **strengthening African training institutes** is being achieved through the facilitation of pairing arrangements and conducting training activities through, for and with staff of the institutes.

Recommendations:

HRDA should continue to seek linkage arrangements for African training institutes and conduct training activities through, for and with them.

HRDA should make clear to African training institutes the serious commitment implied in pairing arrangements and the importance of careful selection of those chosen for long-term assignments at the paired institution.

Conclusion # 6: HRDA is still without an MIS that fulfills its information requirements. This is needed for project control, review, and priority-setting. Not enough data are available for HRDA managers to have a clear picture of project success to date. LAI MIS work to date has covered only the installation of PTMS in Africa Mission training offices. A new computer system is a means to achieve the advantages of automation, but certainly cannot, by itself, be the MIS developmental goal. Computer utilization remains an attractive option whenever routine data collection and standardized processing are required.

Recommendation:

Develop a comprehensive, up-to-date description of HRDA information requirements, covering the entire framework of data needs and potential sources, to serve as a guide in the design and development of an adequate MIS for HRDA. For reference in preparing an analysis of HRDA information requirements Annex D contains a description of components for an MIS model, based on the evaluation team's direct observation of HRDA project activities and on information provided by interested parties.

Conclusion # 7: The **HRDA MIS effort lacks management instruments** to ensure effective project team communication and agreement on goals and purposes, roles and responsibilities and costs.

Recommendations:

Undertake a logical framework analysis of the MIS to validate its usefulness to the HRDA project and to the entire Africa training program and to support MIS implementation decisions.

Spell out to the contractor the role and responsibilities of the MIS coordinator. Base contract performance indicators on the accomplishment of tasks related to those responsibilities.

Require from the contractor a workplan and budget for MIS development and operations, supplemented by periodic budget updates and expenditure reports.

Develop a schedule of deliverables in terms of statistics and other data on Africa training programs. Key contractor performance to meeting delivery deadlines.

Conclusion # 8: Training offices in Africa missions are beginning to operate PTMS as an information storage and retrieval system. **PTMS is a responsive and useful system** where it is installed on a freely accessible Wang 280 PC, or its equivalent. Data in some Mission PTMS files are sufficiently complete for MIS test purposes.

Recommendations:

Assist Mission exploitation of PTMS to support Mission-specific needs by gathering data on problems, additional requirements and Mission-specific innovations. Working with OIT, AFR/TR/EHR and the MIS coordinator, identify and formulate generic revisions to the PTMS for Africa-wide use.

Work with OIT, OIRM and AFR/MGT to ensure that PTMS installations include the Wang PCV 280 computer or an equivalent. Encourage Missions to locate the computer system where all of the training office staff can have easy access for impromptu use.

Include in project MIS activities procedures and a schedule to obtain PTMS data selectively, to review the validity and usefulness of the information and to present test results for management attention.

III. Project Management Issues

Conclusion # 9: HRDA's management structure fundamentally fits the demands placed on it by the project. Since it is flexible and decentralized, however, it puts special requirements on HRDA's information and decision-making system. Enhanced flows of information from AID/W to the Missions and vice versa are needed, as are reporting procedures and mechanisms adapted to HRDA's special character.

Recommendations:

Funding should be provided to enable the AFR/TR/EHR Project Manager to travel regularly to Africa to keep informed of progress or problems with HRDA and to convey information directly and accurately to HRDA project managers in Africa.

HRDA management needs to conduct a self-audit of: a) the way responsibilities are shared; b) the periodicity and content of reporting arrangements: c) its mechanisms for reviewing reports; d) the making and communicating of decisions; e) mechanisms to facilitate collaboration between AID/W and the Missions and between HRDA and other sectors and donors. It should convene a series of in-depth reflections involving LAI, other divisions in AFR/TR, AFR/MDI, and WID in order to review such areas as communications, responsibilities, decision-making and priorities. The reflections involving groups with more extensive interactions should take the form of a retreat and use a facilitator (see Annex B).

Conclusion # 10: HRDA has gotten off to a good start. Participating Missions, with the help of core services, have completed private sector training needs assessments, established private sector advisory boards, developed strategies, staged regional conferences,and carried out a mix of training activities both short-term and long-term in Africa and in the U.S.

Problems have been encountered in third-country training, but delay in the installation of MIS and PTMS is the one area of serious concern.

Recommendation:

Accelerate the completion of installation of the HRDA's MIS.

Conclusion # 11: Some Missions suffer from lack of information about quality third-country training institutions, availability of core services, and creative HRDA initiatives in other Missions.

Recommendation:

Use core services to develop and disseminate and maintain brief, computer-accessible evaluative directories or other sources of information concerning third-country training opportunities.

Conclusion # 12: HRDA achieved an outstanding success with the francophone and anglophone regional workshops jointly sponsored with AFR\MDI, which aimed at laying a foundation for policy reform vis-a-vis the informal sector.

Recommendation:

Continue the support of creative, prudent approaches to assist the informal sector, which is so important a generator of employment in Africa.

Conclusion #13: The skills and know how required to manage HRDA training have placed FSN training officers in positions of considerable responsibility that are critical to project success.

Recommendations:

Give high priority to the training and professional development of training officers.

Continue and expand the workshops for training officers.

Communicate to Mission directors OIT's decision to permit upgrading of training officers to FSN 11.

Conclusion # 14: HRDA supported training programs are using sound, learner-centered methodologies. Training officers are implementing end-of-training evaluations, but indicators have not yet been developed that can be used to measure project impact on the post-training job performance of trainees, increased employment, and economic growth.

Recommendation:

Provide Missions with information concerning impact indicators that is presently being developed by OIT.

Convene a workshop for Mission representatives to develop HRDA impact indicators -- and at the same time clarify project scope and thrust, and plan future directions.

Conclusion # 15: It is important to begin now to establish both project-wide and country-specific indicators of HRDA success to measure project impact.

Recommendations:

Keep track of input-output indicators and training costs through the MIS.

Encourage missions to engage in their own goal-setting and to identify indicators they think appropriate to their own activities.

Have HRDA core services assist Missions by:

- o providing them with information concerning possible impact indicators presently being developed by OIT;
- o informing Missions about activities such as the brainstorming sessions of the Kenya Mission that might serve as models for their own efforts; and
- o facilitating communications and networking between Missions.

Review impact indicators developed by individual missions in AFR/TR/EHR to see if they yield additional project-wide measures of impact.

ANNEXES

ANNEX A

INDIVIDUALS AND AGENCIES CONSULTED

AID/Washington:

Cameron Bonner AFR/TR/EHR
Judith Shampain AFR/TR/EHR
H. Genc Peuse AFR/TR/EHR
William Renison AFR/TR/EHR
Randall Roeser AFR/TR/PRO
Lance Jepson AFR/TR/ANR
Calvin Martin AFR/TR/ANR
James Shepperd AFR/TR/HPN
Brian Kline AFR/TR
Ray Malley AFR/MDI
Michael Caughlin AFR/MDI
Fred O'Regan AFR/MDI
Cindy Clapp-Wincek AFR/DP
Emmy Simmons AFR/DP
Sidney Bliss AFR/PD
Al Bisset OIT
Dan Terrell OIT
Victor Barnes PPC/PDPR/EHR
Ron Grosz PPC/WID
James Hoxeng S&T/ED
Aileen Kishaba OIT/PP/EI
Dianne Arnold M/SER/IRM
Suzanne Buzzard M/SER/IRM

Labat-Anderson:

Richard Everett
Victor Labat
Deborah Orsini
Hank Raullerson
David Harmon, consultant

MSI

Marina Fanning

Senegal

Ousman Ndao
Terry Myers

Guinea

Conakry

Byron Bahl, Mission Director, USAID
Teddy Stervinou, Deputy Director
Joseph Hartman, PDI
Moustapha Diallo, TO
Hadja Diallo, TA.
Koné, Training Clerk
Ibrahima Kassory Fofana, Director General, Bureau of International Cooperation
Abdel Kader Gassama, Director of Bilateral Relations
Mlle Ousmane Afia Diallo, Head of Americas Section
Trainees from the Centre National de Promotion des Investissements (CNPIP)
Ibrahima Sory Keita, Deputy Director General of CNPIP and President of the Private Sector Advisory Board, and several board members
Mme Ramatoulaye Sow, President of the Association of Woman Entrepreneurs of Guinea, and board members
Aliou Condé, Director, Centre National de Perfectionnement à la Gestion, and staff members
Mme Hadja Deo Balde, General Secretary, Conakry II Prefecture
Mme Djenabou Sy Kanté, Proprietor, Racky Teinture

Coyah

Local officials, trainers, and female participants in a seminar on irrigated vegetable production

Zaire

Denis Chandler, USAID Mission Director
Joe Goodwin, Deputy Director
John Bierke, Program Officer
Arnold Lessard, Private Enterprise Officer
Michael Sullivan, GDO
Kamal Zein, HRDO
Massila Kwa Nkazi, TO
Mbuyu bin N., TA
Twelve entrepreneurs at the Office for Promotion of Entrepreneurs of Zaire(OPEZ) who were participants in HRDA training programs

Tanzania

Joseph Stepanek, USAID Mission Director
Paula Tavrow, HRDO
Daniel Ngowi, USAID economist
Christine Hjelt, TO
Flora Majebelle, TA
Maggie Hiza, TA
R. O. S. Mollel, Deputy Secretary, Ministry of Finance
Mr. Maenda, Executive officer, Association of Tanzanian Employers

Chris Malongo, entrepreneur and member of Tanzanian Chamber of Commerce

Kenya

Marcia Bernbaum, USAID HRDO
Stephen Ragama, TO
Amina Abdi Salim, TA
Carla Barbiero, Project Office
Garry Moser, PROG (Evaluation)
Sandi Severn, Project Office (Private Sector)
Holly Weiss, Project Office (Private Sector)
Howard Sumka, RHUDO
Carol Steele, Program Office
Theresa Mugoya, Project Manager: Training for Dev. Project
Mr. Konditi, Federation of Kenya Employers
Mr. Muricho, Directorate of Personnel Management, Presidency
Participants of Ministry of Finance training program, Nyeri
Joseph Luguya, Project Officer, REDSO/SWA
John Wall, Seychelles Desk Officer, REDSO/SWA

ANNEX B

TASK-FOCUSED INTERGROUP MEETING

Assumption:

1. In modern organizations interdepartmental relationships are extensive and critical.

2. Therefore, a systematic, controlled "intervention" to foster collaborative endeavors, negotiate the reconciliation of divergent interests, or reduce conflict can notably enhance overall organizational effectiveness.

Planning:

The two managers heading up groups/departments interested in improving collaboration review with the facilitator the usual, broad objectives of intergroup interventions in order to particularize them in terms of their specific situation. They also review the basic design and adjust it to accord with the needs of their groups. The date, number of participants, and time to be allotted to the intervention are also specified. (At times it is necessary to meet with other members of the two groups to discuss with them the intervention's nature and purpose.)

Method:

1. Facilitator provides brief conceptual input on the organizational roots of intergroup conflict and the mutual advantages of reducing it.

2. "Rules of the game" are proposed and participants are asked to agree to them.

3. Each group, working by itself, develops three lists of Requests and Offers to present to the other group.

4. The two groups come together to exchange and explain lists; no discussion is allowed at this time.

5. Each group, again working separately, discusses the list handed it by the other group and formulates its responses.

6. The two groups meet together again to record agreements, negotiate differences, make commitments and plan followup.

Notes: a) Several features of the design serve to minimize and control conflict; normally the facilitator does not need to intervene on inter-personal issues.

b) It is important to break, minimally for a lunch in common, between #4 and #5.

c) Small groups, working efficiently, can achieve very satisfying results in as little as four hours.

d) The number of participants can range from as few as 3 on each side to as many as 20.

ANNEX C

LOGICAL FRAMEWORK

Human Resources Development Assistance Project

698-0463

Narrative Summary	Verifiable Indicators	Means of Verification	Assumptions
Goal: To strengthen the capability of African development institutions and private sector entities to promote economic growth, where lack of adequately trained cadre is identified as a primary constraint.	Public and private institutions improve their policies and programs to achieve development objectives. African universities and training institutions improve their abilities to train human resources Private entrepreneurs show improvements in technical skills and management capabilities.	Follow-up status of participants Evaluation findings	Host governments are receptive to training which fosters increased private sector participation, policy dialogue and strengthened private sector representative groups.
Purpose: To stimulate, facilitate and support national and regional training programs that will provide qualified technical, scientific and managerial personnel and policy planners to strengthen African development institutions, enhance the growth of the private sector and increase the participation of women in development.	Training institutions strengthen training in scientific, technical and planning fields Share of women among AID participants increases to 35 percent Share of project participants for private sector training is 50 percent	Country Training Plans submitted by missions Project, mission and S&T/IT data on participants	Mission and host governments focus HRDA training on personnel needs of key institutions, including training institutions and private sector entitites. Participants return to home countries and use their training. Returned participants exercise influence in policy decisions Host governments will make available appropriate candidates, including women

Outputs: Participants trained in priority fields of study, as determined by missions and host countries	Estimated numbers of participants by type and site of training: U.S. Academic 231 (3%) Technical 1320 (19%) 1551 22% Third country Ac.&Tech. 890 13% In-country 3475 50% Regional seminars 1075 15% Total 6991 100% Estimated numbers of participants by sector: Private sector 3535 51% Public sector 3456 49% Estimated numbers of participants by gender: Male 4544 65% Female 2447 35%	Project management information system Mission reports S&T/IT records Evaluation reports	Qualified candidates are available in a timely fashion Third country institutions accept project participants
Inputs: AID $53,000,000 HCs 5,860,000 Pvt Sec 645,000	See Financial Plan	Limited Scope Grant Agreements AFR/DP records	Incremental funding is available in the authorized amounts

ANNEX D

AN MIS MODEL

BACKGROUND. The HRDA MIS is evolving in an environment of diverse authorities, requirements and needs expressed by functional entities with widespread organizational and geographical reach. The usual design approach; i.e., to create a single "integrated system," is feasible after data requirements are defined and information flows provide valid and complete data according to reliable schedules. At present the HRDA MIS development is affected by disparate interests and priorities, by a variety of unsolved information flow problems and by lack of a formally organized, problem-solving approach to determine its requirements.

The July 1987 Project Paper indicates for the HRDA MIS two principal purposes:

1. "To provide statistics and cost data for all AID training activities in Africa, in order to serve Agency program functions at all levels of decision-making;

2. "To monitor training activities and costs for the estimated 7,000 participants and trainees to be funded by the HRDA project."

After eighteen months, these purposes are joined by the need to define indicators and capture HRDA evaluation information. There are needs related to HRDA's impact on project staffing and training office workload. Operational work such as systematic communications, staff training, and information-sharing also demand MIS support.

Thus, the HRDA MIS could be charged with additional purposes:

- To monitor training program workload and develop appropriate and work-effective operational procedures for Mission use.

- To support communications and information-sharing between HRDA project management and training offices.

- To identify and collect impact evaluation information.

Annex K of the HRDA Project Paper spells out much of the technical and mechanical work to create a computer-based information system, once requirements analysis is done. This appendix to the HRDA Evaluation Report presents in Section A, a descriptive model to support requirements analysis. The model includes brief examples of existing MIS components and a checklist of information requirements/resources. Section B discusses examples of HRDA MIS problems arising from various quirks in the model and poses related issues that must be resolved to facilitate MIS development. Section C contains an outline of tasks related to MIS development.

A. DESCRIPTION OF MIS MODEL

The model is described in two sections: 1) HRDA management information components and existing examples; and 2) a checklist of requirements/resources for HRDA and Africa training programs.

1. HRDA Management Information Components

For purposes of the model, the HRDA MIS components are listed in four groups; namely, activators, information, flows and tools.

1. Activators are entities whose functions or needs cause the MIS to capture or to supply information on Africa training programs, particularly the HRDA project, for planning, budgeting, monitoring, reporting or other programmatic purposes. Activators do not always create or use HRDA MIS information directly. They sometimes have authority over work, or set priorities, that affect the creation of information, the flow of information or the tools supporting the HRDA MIS.

Some HRDA MIS activators are the following:

Mission Director/Deputy Director, or comparable management official keeps informed on all current issues related to the training program; i.e., HRDA targets for private sector training and women; OYB level for training projects; staffing and workload.

Mission Program Office staff gather data for ABS/CP submissions; keep informed regarding general training administration issues, review budgets and training costs shown in obligating documents.

Mission Executive Office reviews and approves allocation of position and grade level for Foreign Service National (FSN) and Personal Service Contract (PSC) resources in the training office.

REDSO or Mission Controller, does fiscal accounting for HRDA project; provides monthly MACS reports by project and, optionally, by pre-defined breakdowns or elements.

REDSO or Mission Contracting Officer provides procurement services to the training office.

Mission Project Development Office staff collect semi-annual project implementation reports for review and submission to AFR/W; keep abreast of training program issues such as the development of a leadership role in training for the private sector. HRDA is not considered a project by all Missions.

Mission Private Sector Advisor or Economist may wish to be aware of ways to collaborate with training office in carrying out the private sector training initiative.

Mission Human Resources Development Officer or Project Development Officer has direct supervisory responsibility for training program implementation, including training needs assessments, country training strategy, country training plan, training office response to Mission information and operational requirements, administration of training activities, staffing and workload and supervisory issues.

Mission Training Office (Training Officer, Assistant Training Officer, Training Assistant), staff maintain operations and perform training office work (candidate selection, pre-departure orientation, English Language Training program coordination, placement, Training Implementation Plan (TIP) review, trainee administrative support (sometimes in receiving country as well in country of origin), administer in-country seminars and workshops, monitor progress of trainees in U.S.

and third countries, perform follow-up functions), manage HRDA project budget, account for reservations and earmarks, identify and select appropriate institutions and courses, organize and work with private sector advisory board, work with public sector organization on trainee selection; assist negotiation of Limited Scope Grant Agreement and annual amendments; arrange Mission representation or attend graduation or end-of-course ceremonies, provide scheduled or, ad hoc, fiscal, statistical or narrative information about training program issues or activities as needed by HRDO, Project Development Office, Program Office, other Mission or country team entities.

U.S. Embassy occasionally request information on participant training program; provides cash for training allowances; controls in-country U.S. direct hire and foreign national employment levels; controls FSN grade levels.

United States Information Service (USIS) occasionally requests information on participant trainees. USIS sometimes operates the English language training program or follow-up activities.

HRDA Project Manager (AFR/TR/EHR) requires background information for annual review and approval of country training plans before budget allowance can be issued; needs regular performance and prospective program information in statistical and narrative form to monitor achievement of HRDA targets; needs information on field requirements for technical assistance and support services to administer the core services contract.

HRDA Core Services Contractors (Labat-Anderson, Inc.), provide technical assistance (private sector training needs assessments, PTMS installation, in-country workshops).

Chief, Education and Human Resources Division (AFR/TR/EHR) needs information on Africa training programs, particularly HRDA for general management purposes, to report to higher level managers and for use as needed, in sector council discussions.

Other Technical Divisions (AFR/TR/ANR and AFR/TR/HPN) staff are interested in getting Missions to use HRDA funding for public sector management training, especially where the country program shifts to non-project assistance and existing bilateral obligations do not support training.

Other Africa Bureau Offices:

- **Office of Market Development and Investment (AFR/MDI)** undertakes assessments of private business climate in Africa and publishes selected country studies, such as Manual for Action - Private Sector (MAPS).

- **Office of Development Planning (AFR/DP)** receives and reviews annual budget submissions (ABS), controls Bureau funding allocations for budget submissions and the Congressional Presentation, issues country OYB levels, reviews CDSS/Action plan strategies, targets and benchmarks.

- **Office of Project Development (AFR/PD)** issues instructions for semi-annual project implementation report (PIR), holds PIR reviews. AFR/PD staff presume PTMS eventually will supply data for the HRDA PIR as the systems become operational in Africa missions.

Other AID Bureau Offices:

- **Bureau for Private Enterprise (PRE)** has Agency-level interest in private sector development; some Office of Housing field representatives at Regional Housing and Urban Development Offices (RHUDO) work with HRDA training office.

- **Office of Women in Development (PPC/WID)** wants gender statistics on HRDA training, on all Africa training programs.

- **Office of Planning and Budgeting (PPC/PB)** issues instructions for annual budget submission, including project budget tables which show obligations and expenditures over three fiscal years and life of project; operates the Program Budget Data System (PBDS) which contains ABS and CP fiscal data.

- **Center for Development Information and Evaluation (PPC/CDIE)** has A.I.D.'s library of project documentation and evaluation reports related to training programs.

- **Office of Legislative Affairs (LEG)** issues annual instructions for Congressional Presentation preparation, including the summary of active and proposed projects which shows fiscal data for three years and life of project.

- **Office of International Training (AID/OIT)**, via Handbook 10 and occasional Training Notices, provides typical procedures for AID training program operations; developed PTMS for Training Office use; provides TCA and PIO/P generator (computer software) for Mission application; manages the centrally-funded Labor Development Project which sponsors U.S. training for Africans; organizes training conferences in the U.S. and abroad, by region.

- **Bureau for Science and Technology Offices (S&T)**, manage centrally-funded projects that sponsor African trainees in U.S. academic and technical training.

- **Office of Information Resources Management (AID/SER/OIRM)** provides technical support for PTMS, PTIS, PBDS, MACS, PAIS and other computer-based systems in AID/W and within Missions.

- **Office of Contract Management (SER/CM)** issues contracting policy and guidance, provides training in contract administration and procurement procedures.

U.S. Programming Agent, under contract or PASA with OIT, does programming and placement in U.S. academic or technical institutions. Partners for International Education and Training (PIET) does TCA reports; does placement and programming for HRDA trainees.

U.S. Training Contractor, under direct contract with Africa Bureau or Mission, does programming and placement in U.S. academic or technical institution; also required to do TCA reporting.

U.S. Training Institution provides support and enrolls trainees in courses; provides grades and other progress reports to training contractor or programming agent.

Third Country Training Institution provides support and training.

In-Country Training Institution provides services stipulated in Mission contract or purchase order.

2. **Information,** which may be in the form of data or descriptive materials about the HRDA Project or any training activity in Africa. Some items still are undefined or not available. Below are examples.

Training Inputs: HRDA OYB level, obligations, reservations, earmarks, local currency in U.S. dollar equivalent, bilateral project PIO/T or PIO/P, regional training projects, centrally-funded training, institutions, course descriptions, seminar/workshop descriptions.

Training Output Targets: HRDA-funded private sector trainees; number and type of training for women, third country trainees, number, content and participation in-country seminars/workshops.

HRDA Project Achievement Indicators: socioeconomic data; individual participant achievement data.

Training Costs: per course; per trainee; country averages from year to year; comparisons between U.S. and third country training; between HRDA and other training programs.

Training Operations: paperwork procedures and volume (selection, pre-departure orientation, programming, monitoring, follow-up); impact of HRDA program size and new leadership and coordination responsibilities; emphasis on private sector; use of PTMS; training workload vis-a-vis HRDA and specific training modality.

Evaluation of Training: baseline data (from training application or start of training, after training, six months after training)

HRDA Project Evaluation: baseline data (at project start)

3. Information flow, or conveyance from a source location to a destination. The destination entity may not always be the activator. Examples of flows to and from specific entities are briefly noted below.

Entity: **AFR/TR/EHR**

From Missions: annual country training plan; requests for technical assistance

From AFR/PD: Information copies of mission Semi-Annual Project Implementation Reports (PIR). Eleven of 27 HRDA countries submitted data on the HRDA project as of March 1989.

From AFR/DP: OYB levels for HRDA; information copy of May 1989 Annual Budget Submission (ABS) which is latest source of country detail for total HRDA project funding (actual year, operational year, budget year).

To OIT:

To Missions: budget allowance approval, based on review of CTP submission in August.

To AFR/PD: Semi-Annual HRDA Project Implementation Report (incomplete due to lack of data from HRDA missions).

To AFR/DP:CTP review/approval for budget allowance cable

To Core Services Contractor:
Mission requests for technical assistance

From MIS Coordinator:

Entity: **Mission Training Office**

To OIT: PIO/Ps for U.S. training; PDFs for third country trainees; PTIS markups; annual follow-up program report; requests for forms and supplies.

To Candidates/trainees:
application form; selection criteria; committee decisions; qualifying exams; programming and placement; pre-departure orientation and support; travel arrangements; return data; follow-up contact

To Public Sector Training Manager:
selection criteria; applicant review; selection decisions; qualifying exams, if needed; programming and placement; return data; follow-up

To Private Sector Advisory Board:
advice on organization of board; applicant selection criteria; applicant review; selection decisions; programming and placement; trainee return data; follow-up

From Core Services Contractor:
Private sector training needs assessment; PTMS installation and training

From OIT: Quarterly PTIS reports for Mission notations on return status of all U.S. trainees (bilateral, regional and centrally-funded)

Entity: **Training Contractor**

To OIT: PDFs for U.S. trainees; TCA reports.

Entity: **Training Institution**

To Training Contractor: student progress information; grades

4. Tools, or the means by which information is gathered, stored, processed or shared. Examples are:

Workshops/Conferences: direct, interactive information-sharing by participants in an organized setting.

Data Systems:

PTMS, developed by OIT, for country-specific training management information.

PTIS, administered by OIT, for U.S. and third country participant trainee data; includes bilateral, regional and centrally-funded trainees.

MACS, developed by FM, supports fiscal accounting and reporting by Mission or REDSO controller; records obligations, reservations and earmarks for HRDA training programs; provides reports to Training Office.

PAIS, administered by FM, supports project-appropriation level accounting functions; records obligations and expenditures from U-101 reports; does not track with MACS data; current reports do not satisfy HRDA project management needs.

PBDS, developed by PPC/PB, supports the Agency's annual budget and CP process, records dollar obligations and expenditures, by year, FY 1978 to present.

Programming Agents, such as PIET, have internal automated management information systems which contain trainee data and cost information.

Contractor TCA, quarterly and annual cost reports.

HRDA MIS, to be developed.

Core Services:

Needs Assessments via in-country study and discussion.

PTMS Training via on site installation and hands-on experience.

Cables and other Communications:

AID/W to/from Missions: annual country training plan submission-comment-approval; core services support requests; consultant TDY schedule/agenda/arrangements.

Inter-Mission: third country training support; identification and availability of courses/institutions.

Intra-Mission: Project Implementation Reports; clearance/approval PIOs; funding citations; contracting; ABS/CP data; training office staffing, space, equipment.

Phone Calls

Staff Meetings

PIR Preparation and Review

CTP Preparation and Review:

In Mission

In AFR/TR/EHR

Monthly Contractor Meeting

Evaluations

HRDA MANAGEMENT INFORMATION REQUIREMENTS/RESOURCES

HRDA information requirements relate to different kinds of management activities, which, for purposes of this model, may be categorized as follows: a) A.I.D.'s budgeting and program justification functions, b) HRDA project management and administration in Missions, c) HRDA project monitoring and evaluation activities, d) the overall Africa training program and e) the management of the MIS. Outlined below are some of the requirements in the five categories, based on evaluation team findings. Many requirements are satisfied by formal documentation in longstanding use; some, as noted, are missing despite a felt need.

a. PROGRAM BUDGET/JUSTIFICATION/OYB CONTROL

Annual Budget Submission: annual, by country/project, Mission submission shows actual year obligations, Operational Year Budget and Budget Year request, by project.

Congressional Presentation: annual, by country program and new activities, fiscal data (three years and LOP) by project, includes table prepared by Mission for country participant training data (U.S. and third country, bilateral and regional).

OYB Level for HRDA: annual, Mission indicates HRDA budget component of country program operational year budget.

Deob-Reob: ad hoc, Mission indicates deobligations available to increase HRDA OYB level.

b. HRDA PROJECT MANAGEMENT/ADMINISTRATION

DFA Action Plan: Issued May 1989 Africa Bureau strategic objectives and targets.

CDSS/Action Plan: Country-specific, not all consistent with DFA Action Plan.

HRDA Project Paper: July 1987 goals, implementation plan, financial plan, training targets; emphases on private sector, in-country training, development of African training institutions.

Sector Assessment (Private/Public): Country-specific needs. Very few public sector assessments available.

Country Training Strategy (5-yr): Country-specific. If not available, country training plan must have HRDA committee review/approval. If present, CTP can be reviewed/approved by HRDA project manager.

Country Training Plan (1-yr): annual, country-specific operational year plan for training programs, seminars/workshops, with budget; basis for budget allowance.

HRDA Update Communication (hard copy): N/A

Training Conferences/Workshops: Usually sponsored by OIT, agenda of 1989 meeting included HRDA-related material. Separate, additional HRDA-sponsored workshops are planned to provide PTMS training and operational information-sharing.

HB 10 Adjuncts:

- **Selection Criteria:** Mission-tailored HRDA specifics vary among countries.

- **Third Country Training Procedures:** Missions, individually, determine step-by-step procedures for mission in receiving country mission or in country of origin.

- **Follow-Up Procedures:** HRDA specifics vary among Missions; some programs operated by USIS.

- **Evaluation Criteria/Indicators:** HRDA specifics to be defined.

Selection of Third Country Training Institutions: Training Offices obtain information case-by-case through direct communications with Missions in third countries.

3. HRDA PROJECT MONITORING/EVALUATION

Project Implementation Report (PIR): Some Missions do not recognize HRDA as a project and do not submit an HRDA PIR; thus, a flow of information for HRDA project monitoring is omitted.

Evaluation Criteria: Per HRDA project paper and subject to country-specific definition.

Impact Indicators: Not yet defined, subject to country-specific definition.

Progress Targets (PP): 50% trainees in private sector; females at least 35% of total.

Mission Action Plan: Mission-specific strategic objectives, targets and benchmarks for training programs; objective tree linkages to HRDA project to be defined.

CDSS/Action Plan: Mission-specific data.

DFA Action Plan: Issued May 1989 Africa Bureau benchmarks include "number of people receiving short- and long-term training, graduate degrees acquired, work productivity of U.S. graduates on the job in their home countries; farmer training; business skills development; estimated impact of skills development on incomes."

d. AFRICA TRAINING PROGRAM

Bilateral project training: project-specific purposes.

Regional project training (AMDP's successor): project-specific purposes.

Centrally-funded project training: project-specific purposes often unknown to HRDA training officer. Training office operations and workload are affected by information gap on central project training and selection of trainees.

HRDA project comparison:

Number of New Participants in U.S. and Third Country Training

Number of In-Country Seminars/Workshops and number of Attendees

Number of Women Trainees

Number of Private Sector Trainees

Participant Bio-Data and Socioeconomic Data

Funding ($U.S. and L/C) for training program; average per trainee month

Cost Analysis (Training Programs and Trainees)

Training Institutions (Quality and Location)

e. MANAGEMENT OF MIS

Examples of information requirements include:

Training Office utilization of PTMS

In-Country Training Database definition

Staff List: HRDO and Training Office

Workload Indicators (Paperwork/Coordination)

Selection Procedures

Follow-up Procedures

Placement Procedures

Pre-Departure Orientation

Cost Analysis

MIS Implementation Plan

MIS Parameters:

- Logical Framework
- Scope
- Budget

Section B. Requirements/Resources Analysis -- MIS Problems and Issues

The HRDA MIS aims to collect information without imposing superfluous work on Mission training offices. So it looks first to existing information flows and determines the possibility of tapping the information and tools of entities in the MIS model for HRDA data.

When information is not available, the HRDA MIS need could be illuminated by exploring the problem for the underlying operational issues. Below are three examples of such an analytic approach.

1. **Problem:** AFR/TR/EHR requires performance information to monitor the HRDA project and to prepare the regional HRDA Project Implementation Report (PIR).

Discussion: The PIR is Africa Bureau's semi-annual performance reporting requirement. Eleven Missions submitting the last PIR included the HRDA as a separate project. Five submissions contained data suitable for the regional HRDA summary report.

The evaluation team found Mission Training Offices willing to provide performance data on a regular basis, although some would prefer using a format devised for HRDA, separate from the PIR.

Issue: PIR responsibility. Is HRDA subject to the PIR requirement as a separate Mission project? or is AFR/TR/EHR responsible for performance reporting on the project as a regional activity?

Issue: PIR content. Does the PIR contain all the performance monitoring information required by AFR/TR/EHR project management?

2. **Problem:** The HRDA project team needs information on training costs.

Description: The HRDA project paper indicates third country training may be less costly than U.S. training. Thus far, actual cost data for U.S. training programs have not been acquired and the project team cannot make comparisons.

Issue: TCA Reporting by Contractor/Programming Agent. Training contracts executed as of January 1989 stipulate Training Cost Analysis (TCA) reports are to be submitted quarterly to the contracting AID entity and to OIT. Programming agents also are expected to adhere to TCA reporting requirements. Could OIT provide a list of contractors responsible for HRDA training programs and indicate those who submit quarterly reports?

Issue: Information Flow. Partners for International Education and Training (PIET) administers training programs under AID funds. Could PIET arrange to provide TCA reports directly to AFR/TR/EHR? Would PIET agree to transfer TCA data directly to the HRDA MIS?

3. **Problem:** Training Office operations and workload are affected by uncoordinated centrally-funded training.

Description: S&T, OIT and other AID/W entities sponsor Africans for in U.S. academic and technical institutions. Some AID Mission Training Offices are unaware of the training until the candidate is ready to depart for the U.S. and only calls on the Mission for assistance (visa or travel allowance). OIT, when training is completed, requests Missions verify the return status of all trainees for PTIS, although some of the centrally-funded participants are unknown to the Training Office. As of August 1989, more than 220 centrally-funded trainees are to be tracked. The occasional support for outgoing participants and the hunt for returnees are tasks which frequently are unplanned and unscheduled work for the Mission Training Office.

Issue: Significance. Does the potential impact of uncoordinated training programs on HRDA program initiatives and on Training Office operations and workload warrant an MIS effort to resolve certain gaps in coordination, procedure and information flow?

Issue: Coordination. Could AID/W offices provide Missions data on programs and candidate selection for Mission consideration in advance of departures for U.S.? Such information enables Mission to examine relevance of training to Mission CTS and to coordinate programming and selection with public sector training manager or private sector advisory board.

Issue: Responsibilities and procedures. Could OIT add to Handbook 10, or issue separately, a directive on participant training program responsibilities of central project managers?

Issues: Information flow.

1. Could OIT obtain from AID/W offices and provide Missions participant training documentation on all centrally-funded training? Such documentation can be used for normal training program monitoring and follow-up, including return status verification.

2. Could OIT provide Missions separate PTIS reports that identify centrally-funded trainees, by project, including the name of the sponsoring office? This enables Missions or AFR/TR/EHR communicate directly with the central project office, if deemed useful.

Section C. TASKS RELATED TO MIS DEVELOPMENT

In conjunction with requirements/resources analysis to complete the model for HRDA MIS needs, MIS development work is comprised of a number of tasks which broadly include activities that support HRDA project management.

1. Build HRDA memory bank
   - Gather project documents, create library and catalog
   - Create HRDA participant training database
   - Directory of training institutions
   - Directory of courses
2. Manage information flow
   - HRDA updates
   - Operational activity reports
   - Core services capabilities and schedule of events
   - Conferences and workshops
3. Support training program management/operations

- Describe Mission-specific procedures (HB 10 adjuncts)
- Collect fiscal data and do statistical analysis of training costs
- Coordinate communications flow re:
  - o Institutional sources
  - o Course availability
  - o AID training operational procedures
  - o HRDA project operational experience
- Identify staff training needs (professional development, PTMS and training office operations and procurement paperwork)

4. Define and gather management information:
   - Workload impact information
   - Monitoring and evaluation data
   - Trends on Africa training programs
   - Comparative analysis of costs
   - HRDA impact indicators and accomplishments

5. Manage the MIS development activities
   - Plan and schedule MIS activities in Washington
     - o Build Africa Bureau HRDA database
     - o Coordinate flow of information from other databases (AID/W, Mission or other)
     - o Coordinate flow of data to/from Missions
   - Support MIS development in Missions
     - o Install and expand PTMS and other data management capabilities software
     - o Expand automation support of training office operations
     - o Identify needs and coordinate PTMS modifications
     - o Develop communications system to/from Missions re HRDA and Africa participant training operations

ANNEX E

HRDA MISSION ACTIVITY PROFILES

Brief profiles of HRDA in four countries visited

GUINEA

Guinea is a nation just now emerging from over two decades of repressive and centralized rule, moving toward political and economic liberalization. There is a sense of openness and excitement about private sector opportunities but not a great deal of familiarity with how a private sector works. In this context HRDA is welcomed as appropriate assistance.

The HRDA project is in the hands of an able and experienced Guinean who has worked for ten years as training manager for SGB, the major multinational bauxite mining company in the country. His strategy has been to have both a private sector and a public sector needs assessment prepared and to follow up by constituting private sector and public sector advisory boards. He has chosen seven ministries as key organizations in the development of private sector policy. The advisory boards pre-select candidates for various types of short or longer-term training and present suggested lists to the Mission for review. They put considerable effort into doing this and are concerned about keeping the process "transparent." So far, all their nominations have been approved. HRDA also works with groups like the Association of Woman Entrepreneurs of Guinea (AFEG) and rural projects to address training needs of women and the rural population.

The evaluation team was able to interview participants like the Secretary General to the Mayor of Conakry II, a woman who had attended an AMI-Impact management course and had found immediate and useful applications from it to her work and to the training of her staff. As another example, the President of AFEG found a seminar on negotiation that she attended in Abidjan had helped her to conclude a bank loan for her business that had been pending for several years. The female participants of a rural seminar on irrigation for growing vegetables for market, however, were concerned that, without assistance in obtaining pumps as essential inputs they would be unable to put their new-learned techniques into practice.

Major stumbling blocks to the Guinea program were the difficulties of contracting in a small mission still dependent on REDSO for procurement support. The training officer experienced delays in these processes in the face of time-critical, promising opportunities. Some of these constraints may be ameliorated when the Mission receives increased on site contracting authority.

Lessons Learned:

1. HRDA can be the right project at the right time in the right place: the liberalization of Guinea politically and economically has proceeded to the point where there are people eager to embark on new economic ventures and aware that they need new skills to do so.

2. The project can achieve vertical integration by offering different types of training opportunity at different levels of organizations (or government agencies) -- short seminars or study tours at the top, longer-term training at lower levels.

3. The project can have tremendous impact on women.

4. The project can attain very high visibility, strong political support, and virtually constant publicity.

5. A training officer can be very effective if she or he:

- has a clear vision of what HRDA should do and what available training resources exist to do it;
- has put together a competent and well-integrated staff;
- has taken on the responsibilities of a project manager, not merely a training officer; and
- has an understanding of A.I.D. project implementation procedures and documentation requirements.

6. Contracting through REDSO/SWA is tortuous and can have a negative effect on project management.

7. The training officer position merits upgrading for those Missions which choose to have the incumbent exercise managerial and technical oversight that the HRDA project requires. (OIT should keep Missions apprised of progress in expanding the participant training officer series to the FSN 11.)

8. Having an immediate superior who appreciates the capabilities of training officers with HRDA project implementation responsibilities and who help clear bureaucratic roadblocks for the them within a Mission is essential to the health of the project.

TANZANIA

The path to private sector development in Tanzania, though beginning to open, is still rocky. There are strong proponents of centrally planned economic development, and experience with private undertakings is limited and frustrating. The team met with Ministry of Finance officials who were upset that the project seemed not to take account of government manpower planning, while a Tanzania Chamber of Commerce and Industry representative was enthusiastic about its potential for private sector promotion.

It is in this context that HRDA is offering training for private sector support. There are so few people not in public sector employment now that quotas for "private sector" must be interpreted in a very broad sense; HRDA in Tanzania concentrates on offering training for present and future molders of policy. In response to the special conditions in Tanzania, HRDA looks quite different from the same project elsewhere. This represents reasonable use of the flexibility inherent in HRDA design, but it may look as if it flouts some of the other mandates of the project.

In Tanzania, HRDA is being used to offer people primarily long-term training outside Tanzania. Since the country has been economically closed to outside influences for two decades, the chance to see how other, more capitalist countries operate is prized by

participants, but the costs of such training are high enough to "mortgage" the project, especially if it is cut back as much as planned at the time of the evaluation. The HRDA/T staff feel that they have generated enthusiasm for the training opportunities they provided this year, that they have thought hard about streamlining the screening process, and that they would be remiss in not responding in some measure to the expectations they have raised.

As a device to avoid government selection of candidates for training, the mission placed advertisements in English-language and Swahili newspapers soliciting self-selected candidates, listing areas for study, and encouraging applications by women. The results, nearly 4000 applications, caught the Mission by surprise. An ad hoc pre-selection committee had to be hired quickly to screen out unqualified applicants. Then the Selection Advisory Board sifted nearly 400 remaining applications down to 98, 96 of whom came for interviews. Thirty-five were finally selected, nearly half of whom were women.

The process of HRDA implementation in Tanzania has made excellent use of the Selection Advisory Board, drawing Africans and Americans from inside and outside USAID together into goal-setting and iterative project planning. The Selection Advisory Board took its duties seriously, meeting frequently, first to develop selection criteria, then to screen and interview applicants. They developed a system of rating that eliminated idiosyncratic evaluations, and they were scrupulous in keeping the entire process transparent. African and American mission staff worked closely with the Board to support its activities.

As a new venture, the process has encountered problems and faces more. The size of the response was the first; the pre-selection committee was assembled hastily and operated without close supervision on the first round. HRDA staff are now considering how to word the next advertisement more precisely to limit the flood of applicants. Problems on the horizon include placement of the candidates -- none of the HRDA staff have had much experience with institutions outside Tanzania, and core services have not provided much guidance -- and evaluation and follow-up. Some of the screening instruments appear to be a fruitful source for evaluation indicators, but the HRDA staff has not yet turned to them for this purpose.

The PSTNA for Tanzania, in the process of being approved by the mission, has suggested a broader range of training interventions, not previously considered by HRDA staff, which they think would be worthwhile and are keen to try. The national Chamber of Commerce, though embryonic, is contemplating undertaking training for micro-entrepreneurs. It might be a useful strategy to let them test the waters before trying to push HRDA in that direction.

A notable strength of Tanzania's HRDA project has been the participatory planning and implementation process, drawing interested Africans both inside and outside the USAID mission into project goal-setting and management and mobilizing the resources of the USAID staff effectively. The mission director values and fosters respect for and delegation of responsibility to Tanzanian colleagues, and the HRDO is a strong and creative facilitator of participatory planning processes. The result is that the project is sensitive to current needs and realities in Tanzania and can be responsive to a dynamic situation. Everyone involved is enthusiastic about the project and its potential for fostering entrepreneurship in Tanzania. Women, especially, see it as a unique opportunity for advancement, free of the harassment they encounter elsewhere if they want to get ahead.

Lessons Learned:

1. HRDA functions well when there is a productive integration of the HRDA project team members with each other, with host country counterparts outside A.I.D., and with Mission management and administration. Ownership of HRDA must be strongly shared by the HRDO, training staff, the Mission Director and the advisory committees.

2. There is sufficient latitude given Missions to adapt the project to the local situation, even if the local project appears to disregard certain of HRDA's mandates: in Tanzania government policy, at best, is very ambivalent about private sector activity so the Mission has decided to initially focus on top decision makers in government before "reaching down" to mid-management levels or reaching out to the private sector.

3. Some Missions will require substantive support from AID/W or REDSO in placing participants into third-country or US programs.

4. HRDA training that is heavily US-based is costly and may result in a "mortgage" of the program and an elitist slant by an orientation to recruit the "best and brightest."

5. HRDA works well if the selection process is iterative, transparent, and contains country-specific impact indicators in the rating forms used for selection of candidates.

6. The project can have tremendous impact on women: it offers them unique opportunities, for which there is pent-up demand, and offers them without fear of harassment.

ZAIRE

In Zaire the focus of HRDA is strengthening of institutions. HRDA has, therefore, been used to provide training opportunities to Zairians to strengthen selected public institutions and the private sector. The mission has done this by funding long- and short term training in the U.S., in-country training and training in other African countries. HRDA had elicited strong participation of women, entrepreneurs and government cadres. It is a project which the mission sees as multi-faceted, flexible and whose scope and potential is still being developed.

The mission has not formed a Private Sector Advisory Board yet, but relies on the USAID project committee for guidance on HRDA issues in Zaire.

The HRDO has considered it important that HRDA reach beyond the confines of Kinshasa and is concentrating activities in three regions: Kinshasa, Shaba and Bandudu. This HRDA training complements private sector activities of other USAID projects in these provinces.

Participant recruitment and selection is done through consultation with the Government and involves a great deal of contacts and communications with numerous governmental institutions. However, there is no written, agreed-upon recruitment and selection procedure to follow, and this may be an area of vulnerability for the mission in the future.

The USAID mission in Zaire is large and very busy; coordination of HRDA among different divisions is difficult to ensure, but is necessary for using the project's fullest potential.

Two problems raised by staff concerned with HRDA are:

a. The need for a good evaluative roster of third country and U.S. francophone training institutions and

b. The need to extend HRDA to the Congo, particularly now when the country is beginning to open up to private sector activity.

Lessons Learned:

1. Use of HRDA varies from one mission to another, depending on conditions in the country and stage of development, particularly of the development of the private sector.

2. HRDA should encourage participating missions to provide training to rural staff and entrepreneurs, within the context of Mission development strategy, and not to necessarily concentrate on activities in the capital city.

3. Recruitment and selection procedures, whether for government or private sector staff, should be agreed-upon, consistent, written down and openly referred to at the appropriate times.

4. HRDA is a highly flexible project. Missions should use whatever means appropriate (staff meetings, PIR reviews, etc.) to discuss in a participatory way how the project should be used.

5. HRDA encourages the professional development of host country national training officers, something of which all missions are not yet aware.

6. HRDA core staff should provide mission with evaluative information on U.S., francophone and third country training institutions.

KENYA

Kenya offers an example of what, sooner or later, is likely to happen to HRDA in any Mission -- the people engaged initially in buying into HRDA and setting mechanisms in place for its operation have rotated out of the Mission and have been replaced by people who have not yet developed a vision of what HRDA might be as a local project. The Kenya example is instructive because the present HRDO has taken a creative, forward-looking, and promising approach toward dealing with this problem.

HRDA in Kenya is in a transitional phase. In the past three months the HRDO who managed the project in its initial stage has left, replaced by someone committed to participatory goal-setting and management who has injected new excitement and vitality into her office staff. Nearly all of these people have come to USAID during the past year, as well; so whatever the initial concept may have been for HRDA, it is now evolving, not fixed.

The main Mission reaction to HRDA, in the absence of someone with a precise vision of what it should be doing in Kenya, is in its flexibility: "It allows us to do whatever we want by way of training efficiently and easily." Most Mission staff see the project primarily as providing flexible and useful training for a broad set of activities in support of general Mission development strategy embodied in the CDSS, rather than as a project with its own

agenda. However, knowledge of HRDA is still scanty in other parts of the Mission that ought to be involved in the project, notably the private sector office which is involved in activities that should contribute to setting HRDA goals.

The present HRDO's first step has been to engage her own staff in setting goals and indicators for HRDA. She has spent considerable time facilitating team-building and goal-setting through brainstorming sessions that include U.S. and Kenyan staff members involved in the project. This current and ongoing effort has not yet reached very far beyond the HRD office. The process:

- incorporates Kenyan views concerning the advisability and appropriateness of proposed activities into the decision-making process;
- allows HRDA to set country-specific objectives for HRDA early enough to direct the project's activities and as potential evaluation criteria well before an evaluation team tries to judge project impact;
- permits an evolving plan for HRDA in response to changing conditions in its country and mission environment.

Links with appropriate staff in the Projects Office, with Private Sector officers, and with managers of related projects are beginning to be forged but are still loose. Because the problem of identifying benchmarks and indicators against which to measure project success is a pervasive one throughout HRDA, however, these activities in USAID/Kenya deserve wider attention -- they may prove useful to other missions.

Structurally, the HRDA project has been linked to a public agency, the Directorate of Personnel Management (DPM) attached directly to the Presidency and responsible for manpower planning and training in the public sector, as the primary contractor for HRDA. The present Mission staff responsible for the project were questioning the wisdom of funnelling all HRDA funds through the DPM, though they were committed to doing so through the next fiscal year. The alternative they were considering was to channel funds for public sector training through DPM, funds for private sector training through a private sector organization with some training capacity, such as the Federation of Kenyan Employers (FKE) or the Kenya National Chamber of Commerce (KNCC), and reserving a small fund for Mission use in sponsoring attendance at workshops and seminars, especially overseas, that falls outside the purview of the normal public- and private-sector training activities. This would allow HRDA to reach out toward the informal sector as well as to tap into existing training programs. The project management is contemplating choosing one private sector institution as the primary provider of training, strengthening it to manage and carry out HRDA activities and relying on it as a major contractor for training.

Kenya is an example of a country that already has numerous in-country facilities for running management training for both public and private sectors. In-country training is an acceptable mode to trainees, so much so that there is little demand for third-country training (except for some courses at ESAMI which are normally handled from Nairobi, not Dar, and are hardly seen as study abroad). An issue for the Mission is whether to promote competition between training institutions by spreading the business around or to choose one training institution or two as primary contractors for the project and focus some core funding on strengthening the primary contracting institutions for the mounting the courses the project requires.

It has been easy to draw nearly 50 percent female trainees by organizing appropriate courses and workshops for woman participants separately, though the T.O noted that women were hesitant to join workshops that included men. HRDA has successfully run

three courses in management and income-generating activities for a total of 184 women using local training institutions. It has had no trouble exceeding HRDA targets for proportion of women by dint of offering courses exclusively for women.

Although HRDA has not encountered any serious operational difficulties in Kenya, it has not yet come into sharp focus. The exercises that the HRD staff have engaged in, as a result, to define and agree on goals for the project are particularly interesting in light of the general need for all Missions to focus on appropriate indicators for guiding and evaluating HRDA activities in the context of each African country. They could be useful to other HRDA managers.

Private sector needs analysis has been a neglected area in the operation of HRDA in Kenya. The Mission has a Country Training Strategy that does double duty as a quasi-PSTNA, but it is not clearly focused on private sector training needs. Because there is considerable interest in private sector development and many Kenyans involved in private sector analysis and training, sending in an expatriate team to do a PSTNA may not be the appropriate way to go -- unless it is supplemented with Kenyan experts who have roles both in setting the assessment methodology and in carrying out the actual research. But, one way or another, an assessment of training needs would be useful in focusing the program.

Lessons Learned:

1. The HRDA project can be used to provide broad, somewhat open-ended support of general CDSS objectives.

2. Where the host country is rich in training facilities, third-country training is a very minor component of HRDA.

3. It is useful to diversify modes of disbursing HRDA funds: USAID/Kenya has been channelling virtually all it HRDA funds through one (public sector) agency which has limited the Mission's ability to respond flexibly to targets of opportunity.

4. A participatory planning and goal-setting process lead by the Human Resources Development Office can be instrumental in drawing African and American staff together in conceptualizing and "owning" HRDA. It is also very useful in identifying country-specific indicators of project success early in the life of the project.

5. HRDA can have great success in meeting female targets by mounting courses for women. It is notable that this strategy for addressing women's needs is not tied to a particular religion but is rooted in the cultural and social context of a particular region or nation.

ANNEX F

EVALUATION SCOPE OF WORK

Delivery Order No. 20
PDC-1109-I-20-7120-00

BACKGROUND

On July 24, 1987, AID's Africa Bureau authorized the Human Resources Development Assistance (HRDA) Project (698-0463) which covered 24 countries with Life-of Project funding of $53 million from FY '88 - FY '92. The planned project assistance authorized on April 20, 1988, increased the number of countries to 32, to include the 8 Sahel countries. It increased Life-of Project funds to $70 million, decreased estimated core funding and increased estimated Mission buy-ins. The estimated number of project participants/trainees was increased from 6,991 to 10,015.

The objective of the project, however, has not been changed; it remains the same. Its purpose is to stimulate, facilitate and support national and regional training programs that will provide qualified technical, scientific and managerial personnel and policy planners to strengthen AFrican development institutions, enhance the growth of the private sector and increase the participation of women in development.

ARTICLE I - TITLE

Human Resources Development Assistance

(PROJECT NUMBER; 698-0463.95)

ARTICLE II - OBJECTIVE

The overall intent of the evaluation is to determine whether or not HRDA is on the right course towards achieving the project's purpose. This mid-term evaluation is a formative assessment meaning the intent and methods used will be to 1)stimulate dialogue, 2)capture issues of importance that might not have been considered by the project management team, and to 3) make recommendations that will increase the chances of project success.

ARTICLE III - STATEMENT OF WORK

A. General

In order to realize this intent the evaluation has as its objective: 1) to assess progress toward attainment of HRDA purposes; 2) the appropriateness of the management structure and 3) activities under the project training for the development of the private sector; training of women; and the development of a computerized data system on AID funded training in Africa. With this in mind, the evaluation will begin with the following sets of questions to guide inquiry. These are suggestive of the issues of concern to be investigated.

B. Specific

1. Purpose and Overall Assumption: Does experience to date support project assumptions that in-country and third country training over U.S. training will a) improve effectiveness and reduce costs and b) increase the participation of women and business persons? Are project activities, such as U.S. observation tours and conferences in Africa, c) increasing awareness and providing skills among key government leaders for initiating policy changes to promote free market economies. Should and will the project result in d) strengthened third country training institutions, especially in regard to training relevant to private sector development?

2. Implementation Strategy: a) Are activities to date consistent with HRDA's purposes, and do they indicate that the project's purpose will likely be attained? For example, have the training assessments already conducted and strategies developed been useful in helping Missions target critical human resource constraints? Do the reviews in AID/W of these strategies and annual plans serve a useful function? Because HRDA is a regional project, funded through Mission Operational Year Budget (OYB) transfers rather than from central accounts, how does this alter the role of the AID/W managerial team and the kinds of support and oversight activities they should perform? Can Mission meet the management demands that result from increased in-country and third country training and from the needed recruitment of special target groups such as women, small business persons, and senior policy-makers?

3. Methods and Mechanisms: a) Are the Private Sector Training Needs Assessments (PSTNA) surveys methodologically sound and related field activities effective in guiding and inducing Missions to embark on HRDA training? Is the Country Training Strategy (CTS) methodology sound, and is the exercise being executed appropriately? b) Are the AID/W mechanisms for assisting the field adequate? How effective has the management system development methodology been in the field and in AID/W?

4. Chances of Success: a) What are the indicators that the project is on the right track to accomplish its stated objectives? b) What steps or methods need to be put in place now as to measure project success so as to broaden impact beyond that originally envisioned?

5. Mid-course Corrections: a) What changes should be made to HRDA to have it serve Missions' and Africa's HRD needs better within its scope and resource limitations? b) What specific steps should be taken to achieve these changes"

- in management, structure, reporting, processes?

- training, focus, targets, methods, organization

ANNEX G

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