

AGENCY FOR INTERNATIONAL DEVELOPMENT
PPC/CDIE/DI REPORT PROCESSING FORM

ENTER INFORMATION ONLY IF NOT INCLUDED ON COVER OR TITLE PAGE OF DOCUMENT

1. Project/Subproject Number 9363041	2. Contract/Grant Number DPE-CA-4047-00	3. Publication Date Sept. 20, 1991
---	--	---------------------------------------

4. Document Title/Translated Title
Trip Report

5. Author(s)
1. Marsh, Noel
2.
3.

6. Contributing Organization(s)
Family Health International

7. Pagination 74p	8. Report Number	9. Sponsoring A.I.D. Office Population
----------------------	------------------	---

10. Abstract (optional - 250 word limit)
Develop Operating Procedures manual for the NPC

11. Subject Keywords (optional)

1.	4.
2.	5.
3.	6.

12. Supplementary Notes

13. Submitting Official David C. Lynn	14. Telephone Number (919) 544-7040	15. Today's Date 8-3-92
--	--	----------------------------

.....DO NOT write below this line.....

16. DOCID	17. Document Disposition DOCRD [] INV [] DUPLICATE []
-----------	--

78432

TRIP REPORT

TRAVELLER'S NAME: Noel Marsh

PROJECT TITLE/NUMBER: Family Health International
Egypt NPC/IDP
SA 5588

TRIP DATES: August 21 - September 20, 1991

TRIP SITES: Cairo, Ismailia

TRIP PURPOSE: Continue the work needed to develop
Operating Procedures Manuals for the
NPC/Governorate Offices.

DISTRIBUTION: NPC/IDP Director
Family Health International (4)
USAID (1)
AID/Washington (1)
EPA Project File/Cairo Office
EPA Project File/Home Office
EPA Consultant (2)

TABLE OF CONTENTS

	Page
1. Summary.....	1
2. Consultant's Scope of Work.....	2
3. Activities and Achievements.....	3
4. Issues and Recommendations.....	15

APPENDIX

- A. Persons Contacted
- B. Status of Overall Project
- C. Status of Individual Chapters
- D. Follow-on Scope of Work

1. SUMMARY

Considerable progress was made during this visit. Two meetings were held with the newly appointed NPC Deputy Director General, Mr. Salih Fadat, where the status of the project was reviewed and discussed. Mr. Salih expressed his interest in giving the chapter on Organization and Communications high priority and was eager to begin work in this area. The follow-on scope of work responds to this directive and emphasis will be placed on the development of this chapter. Progress was made in refining the Finance and Planning drafts and both should be ready for final review during the next visit. A dialogue on the Monitoring and Evaluation Chapter was started and data was gathered to begin work on the Training Manual. Plans were made to continue the practice of getting "user input" during the development phase of each manual chapter. A proposal was made to conduct regional workshops in several governorate to introduce each Chapter and at the same time achieve specific regional objectives; eg. an updated regional plan, a budget request etc. Arrangements are being made to implement this procedure. The "mini-report" on Manual Presentation and Format was favorably received. It has been revised to

incorporate new data and is included in Appendix B of this trip report. The follow-on scope of work for the next visit and interim period between visits is contained in Appendix D.

2. SCOPE OF WORK

- Review the comments and suggested changes on the Working Paper on Department Descriptions.
- Take whatever steps are needed to obtain final NPC approval on the chapters on Planning and Finance.
- Refine and expand the first drafts of the three chapters that were developed during the interim period.
- Prepare follow-up Scope of Work for the next interim period between trips and the next consultancy visit.

As work progressed on the various chapters of the Manual it became increasingly apparent that the vitality of the organization would be enhanced and more able to be sustained if some of the functions now performed under the

Institutional Development Project (IDP) could be integrated in to the permanent structure of the NPC. It was therefore agreed that as the Support Services elements of the procedures Manuals were written attention would be paid to developing institution building functions as part of the on-going support systems. This additional dimension will be build-in to the overall work plan and will be included in subsequent scopes of work.

3. ACTIVITIES AND ACHIEVEMENTS

A. Methodology

As in the past the main source of information was from meetings and discussions with key people working at NPC. My principal counterpart, Dr. Salwa, the IDP Resident Advisor, Dr. Waleed and I met with the concerned NPC/TS directors to discuss the substance of the various draft documents. I also travelled to Ismailia to meet with the NPC/G office Director to follow up on information that was being gathered or generated as a result of arrangements made during the previous trip. A list of Persons Contacted is contained in Appendix A of this report.

Mid-way through the visit we met with the newly appointed Deputy Director General of NPC to brief him on the status of the project and learn from him some of his priorities and concerns with respect to the organization and the role he would like this part of the Institutional Development Project (IDP) to play in addressing them. At the end of the visit exit briefings were held with the Deputy Director General and USAID and the contents of and focus of the work to be done for the interim period between trips and the next trip discussed and agreed upon. The approved scope of work is contained in Appendix D.

B. Status of Overall Project

(1) Focus and Work Plan For this Visit:

During the initial meeting at the beginning of this visit it was agreed that primary focus should be on producing Manuals for the principal operating departments; i.e. Chapters 2 through 5. Data would continue to be gathered on the Support Services sub-chapters and the other service oriented departments but priority would be placed on developing Manuals for the key operating areas. The notes prepared in

advance of the trip on "inputs to the work plan" and the actual Work Plan developed as a result of the initial meeting are contained in appendix B of this trip report.

During the initial meeting with the Deputy Director General, he expressed his need to begin to look at the overall structure and organization of NPC and suggested that we give high priority to completing Chapter 1: Organization and Communication. Currently this chapter is in the form of a Working Paper and it was agreed to maintain this format until we were able to get sufficient information together to begin to convert it into the standard Procedures Manual format. (See Section C for more details on the plans to accelerate the work on Chapter 1).

(2) **Proposed Presentation and Format for Procedures Manuals:**

A report and "mock-up" for the final documents was discussed at the beginning of the trip. The proposal envisaged each chapter of the Manual to be bound and also contained in a binder that would be arranged and organized in such a way as to make it relatively easy to amend and change the manuals

when necessary. The initial system designs recommendations of the Report were developed in the U.S. with the anticipation that they would be modified and adapted to match local production capabilities. Egyptian suppliers were contacted during this visit and the necessary data has been incorporated into revised report. Producing the types of binders recommended in report on the local market not only appears feasible it also will cost much less and the logistics of distribution greatly simplified.

Since it is planned to distribute and begin using each chapter as it is completed and approved it is important to address this topic and decide on the format now. Because the format of the chapter and the manner in which it is presented and "packaged" is an integral part of the proposed system for amending the documents it will need to be in place when the first chapter is produced. The revised report on the Presentation and Format of the Manuals is contained in Appendix B of this Trip Report.

C. Status of Individual Chapters

This Section of the Trip Report will summarize the

accomplishments made on each chapter or sub-chapter and also includes discussion of work planned in the future:

(1) Organization and Communications

Following the meeting with the Deputy Director General guidelines were prepared to suggest a proposed structure for Dr. Salwa to analyze and organize the material that has been assembled. During the interim period between my visits she will focus on expanding and validating information in the Working Paper on NPC Organization and Communication (see Trip Reports Oct/Nov 1990 Annex C and May 1991 Appendix B). She will also be meeting frequently with the Deputy Director General in order to keep informed of his priorities and expectations concerning this aspect of the project. At the beginning of the next visit we will review the status of the Working Paper and take the necessary steps to incorporate the material into a manual format. The Memos discussing the planned division of labor and suggested approaches to collect and deal with this data along with the suggested guidelines are contained in Appendix C.

(2) Planning:

The Arabic translation of the revised draft has gone through the technical review and editing. The document has been distributed to the concerned Department Directors for their final review and comments. Dr. Salwa will follow through to make sure that all the comments are collected, reviewed and will work with Dr. Waleed to assure that the appropriate changes are included in both the Arabic and English versions of the document. She will communicate with me when issues arrive that require my input or suggestions.

During this visit I spent two days working with the NPC/G Office director for Ismailia, Mr. Mohamed Metwalli. One of the principle items discussed was the feedback of the field test of draft Chapter 2 on Planning, which took place during a Planning work shop held last June in Ismailia. The comments and suggestions made by the participants in the workshop provide valuable information and practical insights. Getting this feedback from those who are directly involved in the process is invaluable and should enhance the usefulness and acceptability of the final product. This information will be analyzed and appropriately included in

the final document. Both the Arabic and the English translation of Mr. Metwalli's notes summarizing the results of this field test are included in Appendix C.

When the NPC/TS Planning Chapters review has been completed the Arabic and English versions of the document will be put in to the "side by side" folders and the master copy carefully controlled as it is prepared for final approval. To insure the compatibility of both versions of the document this format and control system will be the standard for all the chapters going into the final review and approval stage.

It is hoped that approval for the Planning Chapter can be obtained during my next trip in November and that the Chapter can be used, almost immediately, in a local level training workshop that is currently under consideration by the NPC/G Office in Ismailia. The workshop would have the dual purpose of instructing the participants how to effectively use the Manual and produce a more solid and realistic plan for Governorate. This proposal is discussed more fully in the Recommendation Section of this Trip Report. Appendix C also contains copies of correspondence on this subject.

(3) Training:

This information and data for this Chapter, which is still basically in the data gathering phase, was collected during this trip. Most of this data was gathered through a series of intensive working sessions with Mr. Helmi Mustafa of the IDP/Training staff. The topic was also discussed during the Ismailia field visits.

The first draft outline will be developed during the interim period between trips. Given the relatively short time between this visit and the next trip the draft will probably be hand-carried out rather than following the usual practice of sending it out in advance.

It was not possible to schedule a meeting with the Department Director during this trip but it is planned to schedule such a meeting early in November when we should have an outline and some initial text to review with him.

A preliminary outline of the Chapter is contained in Appendix C.

(4) Finance

A redrafted copy of this Chapter had been prepared and distributed prior to the start of this trip. A series of meetings were held with the Director of the NPC Finance Department and all the details agreed upon. There are several forms to be designed or revised and I will send these directly to Mrs. Samera as soon as they are completed. The NPC staff will complete the necessary work to incorporate the forms and instructions for filling them out into the final section of this chapter. A final technical review of the document is scheduled for November 2, after which it is planned to prepare the final Arabic version of the Finance Chapter for review and approval by NPC management.

(5) Monitoring and Evaluation

The draft of the first part of this chapter and the outline of the second part is translated in to Arabic and has under gone a technical review and editing by the IDP staff. The document was distributed to the concerned Directors on September 7, 1991, along with a Memorandum from the Acting

Project Director requesting comments and suggestions from the recipients of the draft chapter. A translation of the memorandum was made so that it could be included in the appendix of this report. Appendix C contains both the Arabic and English version of this memorandum. The meeting, however, had to be postponed but it will rescheduled and a similar announcement will be sent out when a new date for the meeting is set. When the meeting was cancelled it was possible to meet with the Director of the Evaluation Department, Mr. Nabir Ramsy, who kindly agreed to see us on short notice to discuss the contents of the draft paper. Several issues were raised and a dialogue has begun to examine conceptual differences and explore alternative approaches. Mr. Ramsy will provide material and his comments to Dr. Waleed and Dr. Salwa over the next few weeks to explain and summarize his views and ideas on the subject.

The NPC monitoring and evaluation process was also an item discussed during the field trip to Ismailia and is the topic of one of the NPC/G Office Directors training workshops scheduled in November. There will be time programmed on the agenda of this workshop to discuss the Procedures Manual and review the work that has been done so far. The inherent

difficulties created by NPC's purely coordinative role, increasing the involvement of the Regional Population Councils and the need for the team-building approach will be among the topics covered as we seek to develop a practical and useable Manual for the management of this area.

Currently the target is to have this Chapter ready for final review and approval by March 1992, but the situation should be assessed in November and dates set for redrafting and reviewing this chapter. The feasibility of the March target can also be re-evaluated at that time.

(6) Personnel:

Work has not yet started on this chapter.

(7) Support Services:

This chapter is on "hold" but data gathering on the various sub-chapter topics is going forward.

(8) Population Information System (PIS)

An impressive start has been made on the technical development of this system. A preliminary assessment and suggested structure for the system was prepared by Mr. Bill Allbright in 1990 and contained in one of his trip reports. Currently Dr. Russell Dionne, an IDP consultant, is working with the NPC staff to further develop and implement both a Management Information System (MIS) and the PIS. Other than gathering some very basic information and identifying source material no work has been done on the development of the Procedures Manuals that will be needed in these areas. After Dr. Dionne has had an opportunity to review the progress that has been made and familiarize himself with the Manual system being introduced into NPC we will jointly draw up plans to develop the Manuals on a schedule that will be compatible and mutually reinforcing to the work going on in these two areas.

(9) Research

Work on developing a Procedures Manual for the management of NPC's Research efforts has not yet started. Similar to the MIS/PIS situation consultation and coordination with the technical staff working in this area will need to take place before scheduling work on this chapter.

4. ISSUES AND RECOMMENDATIONS

A. Content and Organization of the NPC Procedures Manual

In reviewing the present chapter organization plan additional changes are recommended to assure that all the topics are covered adequately and appropriately. Since the organization is changing and new dimensions are being added it is reasonable to assume that as we develop these manual chapters there will be changes and refinements made in the way the chapters are arranged. The situation will be reviewed from time to time to make sure that the Manuals accurately reflect and address NPC's current operational needs. Meanwhile, it is proposed to continue to treat the

Organization and Communications chapter as an ongoing and active Working Paper and increase the effort to gather data and prepare this material so that it can be used to form the basic text for this manual chapter. Converting the Working Paper into the Chapter format is a high priority.

This latest revision relates to the treatment of the Research and Population Information Systems (PIS). It was planned to cover both of these topics in one chapter but it now seems more appropriate to cover each of these subject areas in separate chapters. The plan is to set forth the procedures for PIS in Chapter 8, this will also include the procedures followed by the Statistics Department. The section of the Manual that will address the procedures for the Management Information System is yet to be determined. It could be part of Chapter 8 or a sub-Chapter of Chapter 7. The IDP consultant working in this area will make recommendations on how these topics should be incorporated into the manual system. Chapter 9 will deal exclusively with Research. There are also recommendations to rearrange and adjust the way in which chapter 7, Support Services, covers some of the various topics. It is anticipated that the subject matter addressed in Chapter 7 may need to be

expanded in the future to include more of the support activities carried out by NPC/TS.

RECOMMENDATION:

That the Manual contain the following chapters:

1. Organization and Communications
2. Planning
3. Training
4. Finance
5. Monitoring and Evaluation
6. Personnel
7. Support Services
 - Transportation
 - Supplies and Equipment
 - Building and Equipment Maintenance
 - Management Information System (MIS)
 - Governorate Affairs
 - Institutional Development
 - Procedures Manual Maintenance
8. Population Information System (PIS)
9. Research

B. Continuing to Involve Managers and Users in the Development of the Operations Procedures Manual Chapters.

There are two training workshops for NPC/G Office Directors scheduled in Alexandria in November. This forum provides an excellent opportunity to generate discussion and obtain user input during the development stage of the manuals. The idea of conducting workshops at the governorate level to introduce each chapter as they are approved provides another valuable opportunity to get user input at a crucial stage in the project. Plans are under way to capitalize on these events.

RECOMMENDATIONS:

1. Prepare material to be handed out at the first workshop in Alexandria that will generate discussion on the Manual process and produce written feedback for further discussion during the second workshop.

2. Organize a regional workshop to use the Planning Manual to produce a practical and updated Plan for the Ismailia region involving the Regional Population Council as well as the key people from the Implementing Agencies.

C. Decision on Presentation Format:

The Report on the Proposed Presentation and Format for the Procedures Manuals has been revised to reflect the discussions and suggestions resulting from the review of the first draft of this document in Cairo during the Aug/Sept visit. The revised report, which is included in appendix B of the Trip Report, includes Egyptian cost data and revised recommendations. Because two of the Manual chapters are close to the final approval stage there is some urgency in reaching a decision on the format and "packaging" of the Manuals.

RECOMMENDATIONS:

Review this revised Report and implement those recommendations that are accepted as soon as possible.



APPENDIX

TABLE OF CONTENTS

- A. Persons Contacted
- B. Status of Overall Project
 - Inputs to Work Plan
 - Work Plan for Aug/Sept 1991 trip
 - Work in Progress (Graph)
 - Revised Report on Presentation and Format for Manuals
- C. Status of Individual Chapters
 - Division of labor and Work Focus Memo (Sept. 12, 1991)
 - Division of Labor and Task Assignment Memo (Sept. 15, 1991)
 - Notes on Work Assignment (Sept. 15, 1991)
 - Chapter 1 Outline (Sept. 14, 1991)
 - Chapter 2 Notes from Ismailia Office (Sept. 9, 1991)
 - Ismailia Regional Workshop Letter (Sept. 16, 1991)
 - Chapter 5 Memorandum Announcing the review of draft on Monitoring and Evaluation Manual Chapter.
- D. Follow-on Scope of Work

APPENDIX A
PERSONS CONTACTED

APPENDIX A

CAIRO:

NPC/TS

Mr. Salih Fadal	Deputy Director General
Mr. Ibrahim Atubi	Assistant Director General Office
Dr. Waleed Alkhateeb	Res. Mgmt. Advisor/IDP
Mrs. Samira Sadek	Director Of Finance Dept.
Mr. Nashy Ramzy	Director Of Evaluation Dept.
Dr. Mohamed Naquib	NPC Consultant/Training
Dr. Salwa Abdel Azim	NPC Consultant/Counterpart
Mr. Helmi Mustafa	IDP/Training
Mr. Esaam Madkor	IDP/Evaluation
Mr. Russel Dionne	Consultant/MIS

USAID

Mrs. Amani Selim	IDP Project Director
------------------	----------------------

Ismailia

NPC/G Office

Mr. Mohamed Metwally	Director of Ismailia Office
----------------------	-----------------------------

76

APPENDIX B

STATUS OF OVERALL PROJECT

- Inputs to Work Plan
- Work Plan For Aug/Sept 1991 Trip
- Work in Progress (Graph)
- Revised Report on Presentation and Format for Manuals

E. PETRICH AND ASSOCIATES, INC.

International Consultants in Management Development for the Health Services
MEMORANDUM

To: Dr. Waleed
From: Noel Marsh, *NLM*
Date: August 10, 1991

COPY

Subject: Notes on Inputs to Aug/Sep visit Work Plan

Work to be accomplished during the Aug/Sep 1991 visit:

1. Review the comments and suggested changes on the Working Paper on Department Descriptions.
2. Take whatever steps are needed to obtain final NPC approval on the chapters on Planning and Finance.
3. Refine and expand the first drafts of the three chapters that were developed during the interim period.
4. Prepare follow-on Scope of Work for the next interim period between trips and the next consultancy visit.

These notes are numbered to correspond to the items in the SOW.

1. Working Paper on Organization and Communication, Appendix B to May 1991 Trip Report. Need to find out status of NPC/TS staff comments if any. What to do about the new Foreign Agreements decree and implications that this may have on chapters that have already been drafted. I would also like to spend some time in Beheira to get more data on the local Pop. Councils. I still need to get the requested reports that Mr. Magdi made at the beginning of this year.

Unless there is some overriding reason for getting this chapter finished I would recommend simply to continue to gather more data and hold this chapter in the form of a "working paper" indefinitely or at least until we get some of the other chapters approved.

2. Planning chapter: This should be a high priority but I need to know how much work has been done with the material and memos I either left here in May or sent in June and July.

Finance chapter: This is the most advanced and highest priority. We should meet with Mrs. Samira ASAP.

User buy-in: I would like to get on the training program

for the NPC/G Office Directors in September (14-18) to present the Finance draft chapter and the format presentation to the group and get their feedback.

3. Refine first drafts of other chapters:

My priorities in this area are :

- (a) Getting approval on the presentation format and mock-up
- (b) Reaction to chapter 7 Manual Maintenance draft.
- (c) Getting some feedback on Monitoring and Eval. draft
- (d) Meeting with Amani and then the appropriate NPC people on transportation.
- (e) Talking to the Training admin and planning people about the current outline we have.

4. Preparation for follow-on SOW: In order to be able to maintain the momentum and continue to push out work during Sept/Oct I need to gather more data on some of the other chapters. I would like to identify the ones to work on next early on in the visit so I can start talking to people and collect data soon. I would also like to firm-up the dates for the next visit ASAP. My proposed dates are Oct. 29 to Nov. 26 including three or four days of annual leave at some point in the visit. This would be a good time to roughly work out the schedule for 1992. What I tentatively have in mind is one trip in Feb/Mar, one in Jun/Jul, one in Sep and possibly an additional trip in Nov/Dec.

I would also like to know what is planned for MIS, PIS and Research and how I should plan to interface and /or collaborate with Russell Dione or others that come out to work on specialized topics of the overall operations procedures.

COPY

MEMORANDUM

DATE: 3 SEPTEMBER 1991
TO: DR. WALEED ALKHATEEB
RESIDENT ADVISOR FOR IDP
FROM: NOEL MARSH *MM*
SUBJECT: WORK PLAN FOR AUGUST 24 TO SEPTEMBER 20 VISIT.

=====

INTRODUCTION:

This plan is based on the workplan input material developed over the past several weeks prior to the trip and the initial meetings with you, the NPC counterpart and USAID project manager. It will serve as guideline to allocate my time during the visit. The plan is, obviously, sufficiently flexible to allow for additions or deletions and changes as circumstances warrant.

Week Of August 24-29

- Meet with Dr. Waleed and Dr. Salsa to go over workplan input material, determine status of

2/6

the various documents under review and develop detailed workplan for this visit.

Brief USAID project office on current status and outline plans for this visit.

Review NPC/TC Director comments on draft planning chapter (2) and make sure all changes are recorded on both English and Arabic master set of companion documents. Respond to and eliminate all editorial comments from draft and prepare documents for final review and NPC approval. If desired review current draft with the Deputy Secretary General before going to final.

Review redrafted (English version) of Finance chapter (4) with Mrs. Samira and staff. Make necessary changes and prepare final English version to go to translation.

Complete editing of Arabic version of the first draft of the Monitoring and Evaluation chapter (5) and circulate to Dr. Maher Waked and Mr. Ramzy and other concerned parties for their review and comments. Arrange meetings with them individually during the week of August 31 and as a group on September 15.

Week Of August 31 - September 5

- Work on refining chapters 2 and 4.
- Meet with appropriate NPC/TS staff to discuss first draft of chapter (5) and collect comments and suggestions and begin drafting expanded text on the detailed procedures.
- Expand outlines of chapter (3) Training.
- Gather information on implications of the new Foreign Agreement Department decree and collect other organizational data to add to the Organization and Communications Working Paper.
- Circulate and discuss outline for future chapters with appropriate NPC staff.

Week Of September 7-12

- If possible meet with NPC Project Director for review of current status and present report and recommendations on manual format, presentation and system for up-dating and revising procedures.
- Visit NPC/G office at Ismailia to get feedback on field test of chapter (2) and get information on the roles played by the Regional and Local Population Councils in the monitoring and evaluation process.
- Visit NPC/G office at Behaira to collect

additional data on their monitoring and evaluation functions, especially as it relates to "Ryadat" activities and the involvement of the Regional, Local and Village Population Councils in the process.

- Time permitting, visit Alexandria and Fayoum to collect information on their monitoring and evaluation experience and discussion of draft chapter (5).
- Prepare a brief mid-trip review of progress report to NPC Project Director.

Week Of September 15-19

- Meet with all the major concerned parties on translated draft of chapter 5 and collect comments and suggestion to incorporate into redraft.
- Conduct necessary exit briefings - collect and organize data generated or discussed outline circulated earlier in the visit in order incorporate this information into subsequent draft on the various chapter.
- Develop SOW for interim period between trips and for next visit.

**REPORT ON THE
PRESENTATION FORMAT FOR THE
NATIONAL POPULATION COUNCIL
OPERATIONS PROCEDURES MANUALS**

Prepared by

EP&A E. PETRICH AND ASSOCIATES, INC.

NOEL MARSH
Senior Associate

814 Grande Avenue
Arroyo Grande, CA 93420 USA
Tel: (805) 481-4189, (800) 628-2928
Tlx: 3794326 EPA
Fax: (805) 481-7154

9 Rostom St., Ste. 25, 5th Flr.
Garden City, Cairo, Egypt
Tel: (202) 356-0015, 355-8634
Tlx: 23019 EXSER UN
Fax: (202) 355-3896

Revised
October 1991

REPORT ON THE
PRESENTATION FORMAT FOR THE
NPC OPERATIONS PROCEDURES MANUALS

(Design and Recommendations)

1. Introduction

This revised report incorporates the new data acquired during the Aug/Sept trip and the modifications and suggestions coming out of the review of the original report and "prototype" model to illustrate the system proposed to present the manual material. Now that two of the Manual chapters are nearing completion it is particularly important to reach an early decision on the format and "packaging" for these documents.

This revised report recommends a basic format for the manual chapters and a set of actions to implement and maintain the system. The objective is to have a series of manuals that are easy to use, easy to maintain and keep current, and designed to be as complete and convenient as possible for the users.

The goal is to have a "user friendly" system that is perceived as a helpful management tool providing guidance and support to those responsible for performing the tasks necessary to implement national policies.

2. Summary of Recommendations

- that the manuals be produced in two forms: Complete Volumes and Separate Chapter Binders;
- that the format of the manuals be designed to facilitate changes and amendments to the documents;
- that a distribution list be developed that takes into account the need for a wide distribution of the most commonly used chapters;
- that procedures and a system for making changes and amendments be established and formalized;
- that a special unit attached to the Office of the Deputy Director General be assigned responsibility for implementing this procedure and working with the

Departments and Governorate Offices to keep these manuals current and up-to-date.

- that steps be taken to produce 1500 binders based on the "mock-up" model provided to NPC in August 1991.
- that these binders be produced in Egypt using sample materials supplied to NPC (the exact material and color to be determined by NPC prior to final agreement on the order). The silk screen labeling on the binders should be delayed until a determination is made on the number needed for each chapter as they are produced.
- that arrangements be made to bind each chapter, similar to the model provided for the Finance chapter sample, as they are approved.
- that arrangements be made to conduct workshops on the use of these documents and that their distribution be timed to coincide with these introductory workshops.

3. Recommended Format

There are two types of user requirements: one is to be able to look at the details of the entire management system and find out information on any procedures relating to specific tasks within the system; the other is to be able to refer to a source of information on a specific topic to confirm or get more details on precisely what procedures must be followed to achieve a desired result.

The first user would benefit most from a complete set of manual chapters contained in one or two volumes and a master file that documents and references changes that have occurred since the manuals were published. This report will not make recommendations on the production and distribution of the complete volumes since this will be an event that can only occur at the end of the project at the time that all the chapters are produced and approved. Recommendations on the format and packaging of these volumes will be made at a later date closer to the actual event and after experience has been gained from the distribution of the individual chapters.

The second user would probably find it more convenient to have a single chapter contained in one book or folder together with changes and amendments noted in the text.

a. Complete Volumes

The complete volumes could be either be put into loose-leaf binders or be stitch-bound to protect against loss of pages. The changes and amendments could be in a separate loose-leaf binder and cross-referenced to the relevant sections of the main volume. Presumably these complete volumes would be provided to the departments and offices concerned with the overall management of NPC.

b. Separate Chapters

These would be designed to be working documents that could be referred to and used frequently in the course of the daily routines of those responsible for carrying out the functions that are covered in the specific chapter in question.

The recommended format is to have a single binder silk-screened to clearly identify the subject matter covered and designed to utilize both the right and left sides of the binder. The right side would have a vertical slip-in pouch to hold the stitch-bound manual chapter. The left side would have a three-ring holder to be used to organize and store the change and amendment documentation.

Special features need to be designed into each part to make the more effective. These features include:

- Dividers incorporated into each section of the bound chapter to make it easier to locate each of the main subjects covered in the chapter.
- At the beginning of each section there should be ten amendment sheets bound into the document. Samples of these amendment sheets are contained in appendix B of this report.
- Dividers used on the left side of the loose-leaf section of the binders to organize and file the amendment documentation.
- A log to record the receipt and action taken to make the changes in the appropriate places in the manual.
- A System for storing and cross-referencing information in the chapter binders. These would include Decrees, Amendment Memoranda and Change and Information Notices.

Suggested formats for the Memoranda and Notices are contained in appendix B of this report.

- A horizontal storage pocket is designed into the left side of the prototype binder to hold blank forms that are too large to fit in to the final section of the manual that deals with "Forms and Instructions".

The prototype sample binder at the NPC/IDP office illustrates how the separate bound chapters and the inter-facing three-ring holder to record and store the change and amendment documentation might be constructed.

4. Production, Distribution and Costs

The first version of this report only covered the question of costs a preliminary manner. It did look at some of the materials that could be used for the binders, made some recommendations on the guidelines that might be used to determine distribution and the numbers required, and makes some assumptions to arrive at a "ball park" estimate of costs. In August of this year IDP staff contacted potential suppliers and talked to local manufacturers about the availability of materials and their costs. The results and findings of these efforts are summarized below.

a. Production

The average size of a chapter is expected to be about 100 pages and the maximum no more than 150 pages. A one inch, or the equivalent, binder should be sufficient to hold both the manual and the amendment documentation.

There are a number of different types of material that would be durable and suitable for these binders.

Three samples were included in the original report. Two of these were obtained from a US manufacturer (cloth and vinyl) and price information provided as a basis for future comparison, since it was always assumed that it would be more efficient and desirable to produce these documents and their binders in Egypt. The third sample included was papyrus which I felt was an interesting idea that would give the manuals a unique and distinctively national identity. No one in Cairo, however, was very enthusiastic about using this material. Some thought that it would not be sufficiently durable to stand up to the wear and tear of daily use so efforts were directed at finding locally

available vinyl products. Samples of available material are in the NPC/IDP office; the quality and choice of selection is very good and the quality of the binder rings is also very good.

b. Distribution

The formula for determining the numbers and types of documents to be produced needs to be refined. As a general rule, however, one would anticipate a fairly limited demand for the complete volumes and a much wider need for the most generally used chapters. A distribution list needs to be developed. If the manual system is going to continue to be used extensively for the foreseeable future, steps should be taken to make sure that all the operating units at all levels have easy and continued access to the documents they need to consult to get their jobs done in the most effective way.

It is recommended that the most commonly used chapters be provided in plentiful numbers to insure that no shortages occur or no artificial value gets attached to having a manual that is widely in demand.

c. Cost

The cost of producing the binders in Egypt is considerably less than the quotes received from the US supplier. Adding shipping cost would make the difference even greater. The most competitive Cairo estimate was LE 13 per binder, including the silk screening and the use of high quality material.

No quotes were obtained on the printing and binding of the individual chapters for it seems likely that the facilities within NPC could be used to produce these documents in-house at a very low cost.

5. Keeping the Manuals Up To Date

a. Amendment Procedures

Experience has shown that procedures manuals can lose their effectiveness if they are not kept current and systematically amended to reflect the changes that invariably occur in any operating organization over time. To assure that these Manuals continue to serve NPC's needs

1/10

and provide the users with up-to-date information a system needs to be developed to keep the manuals current.

To accomplish this it is recommended that:

- a set of procedures be developed to make it easy for the users of the manuals keep track of procedural changes and record them into their manuals as they occur;
- that these amendment procedures be included as a subsection of the manual on Administrative Support - Chapter 7 (see appendix B of this report for an outline of this proposed manual sub-chapter);
- that a unit within the NPC Office of the Deputy Director General be given the responsibility to implement a system to maintain and keep all the NPC manuals current and up to date;
- that all relevant Government and NPC Decrees as well as the specific Amendment Memoranda and Change and Information Notices relating to the chapter be filed in the binder.

b. Decrees

Copies of Decrees that affect the way in which NPC conducts its business should be made available to all the units that are directly or indirectly affected by the changes resulting from the issuance of these decrees. The responsibility for insuring that all affected units get copies of all the pertinent decrees rests with the special unit to oversee the operation and maintenance of the Procedures Manual system. This unit may also need to send a Change Notice explaining the significance of the changes and providing the recipient with standard language and a uniform means of entering and recording these changes into their manuals.

c. Change or Clarification Notices

These notices, which will follow a prescribed format, will be issued by the manual unit to the appropriate manual users. It is the responsibility of the manual user receiving the notice to properly record and store the data into their manual binder.

d. Amendment Memoranda

These will also be issued by the special manual unit and will also follow a prescribed format. The purpose of the Amendment Memoranda is to inform the manual users of major changes in the system and provide them with instructions on how to record these in their manuals. These memoranda will also be cross-referenced in the text and filed in the relevant manual binder.

6. Conclusion

A decision on the presentation format for the NPC Procedures Manuals needs to be made soon since the chapters on Planning and Finance are nearing the stage for final review and approval. It is hoped that the information and suggestions made in this report will help facilitate the decision. A prototype mock-up of the type of manual binder lay-out and design recommended in this report is available from the NPC/IDP office for review and can be used as a model to help suppliers design the final product and arrive at a firm price based on the quality of material and volume of the order.

APPENDIX

Table of Contents

A. Manual Formats

- Page designs with space for noting amendments and changes
- Log for recording and referencing changes
- Chapter check-list to keep track of status and availability of all chapters.

B. Amendment Procedures and Formats

- Outline of sub-section of Chapter 7 on Maintenance and Amendments of NPC Procedures Manuals
- Amendment Memoranda Format
- Change and Information Notice Format

C. Cost Information

- Letter to Bindco
- Bindco cost quotation
- Egyptian Cost Information

APPENDIX A

MANUAL FORMATS

SPACE FOR NOTING AMENDMENT AND CHANGES

Option 1

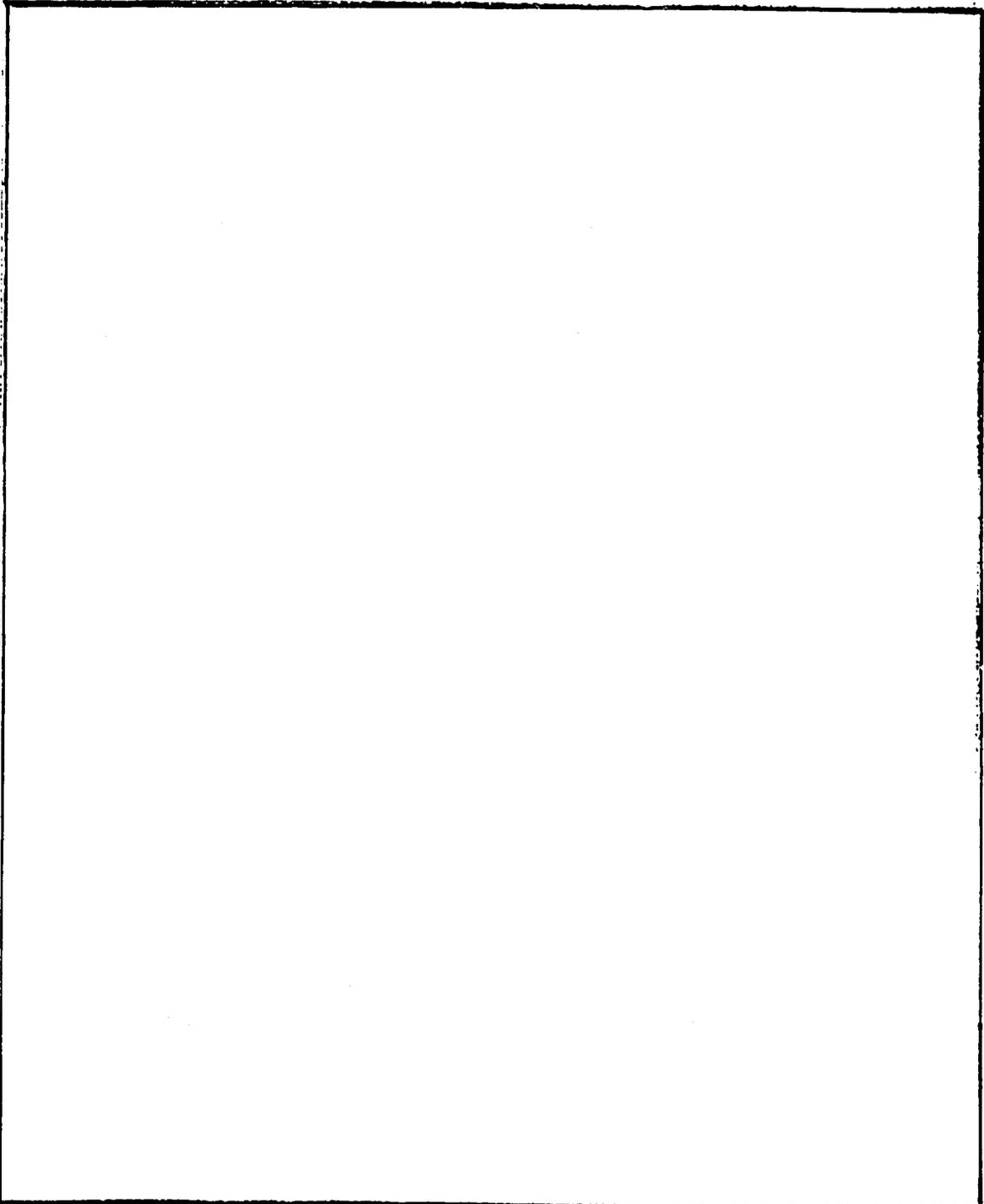
The first set of page formats Exhibit A & B would leave a space at the end of each page to record notes and changes. While this may be very convenient the number of extra pages required would be considerable.

Option 2 (This is the preferred option recommended)

These full pages would be bound into the beginning of each section of the chapter and numbered as regular pages. The prototype model has used this option to illustrate how the system would work. It is recommended that "ten" amendment pages to bound into the beginning of each section of the printed manual chapter.

Option 3

Including these blank pages at the end of each section instead of at the beginning. The page format would be the same as option 2.



SPACE GIVEN UP



SPACE
FOR
NOTE
AND
CHANGE

EXHIBIT B

OPTIONS
TO
FORMAT
NOTE
SPACE

① Simply LEAVE BLANK 2" Bottom MARGIN

NOTES

② BLOCK-OFF SPACE FOR NOTES

REFERENCE	NOTES AND CHANGES	DATE
	③ BLOCK-OFF SPACE AND DESIGNATE USE	

OPTION 2 or 3

AMENDMENTS AND CHANGES
FOR SECTION _____

Subject, Authority & Reference	Date	Notes on changes made & change Notice Summaries

LOG FOR RECORDING AND REFERENCING CHANGES

The following form would be kept in the first section of the three ring loose-leaf part of the chapter binder. Each time a change document is received from the TS administrative unit the person at the receiving office responsible for maintaining and keeping the manuals current would record the pertinent data on the log and file the initiating document in the appropriate section of the loose-leaf part of the binder which is located on the left.

The entry on the right side of the Log form would be hand written or, in the case of a change initiated by a Change Notice, the summary statement could be stapled on to Log form. Additional hand written comments may still be made if the user feels that further clarification is needed.

The objective of the Log is to alert and direct a user of the manual to the most up-to-date information on the procedures to be followed on any given subject that is covered in the manual chapter.

Log & Change Record

<u>Types of Document*</u>			<u>Date</u>		<u>Entry</u>
Decree	Amend. Memo	Change Notice	Issued	Recorded	Sections and pages where notes were recorded & additional comments if needed

*Note: All documents are filed by category and chronologically by the date they were issued.

MANUAL CHAPTER CHECK-LIST

This Check-List would be kept in the manual chapter binder in front of the Log form. Its purpose is to inform the user of the status of each chapter in the manual series. If a user is seeking information or additional guidance on a procedure that is outside of the subject area covered by the chapter in question this check list should help the person find the answers to their inquiry if the topic is in an already approved manual. If this topic is not yet covered the Check-List will tell the users that they should look elsewhere for the guidance they are seeking.

The TS administrative unit will periodically inform the operation departments and offices of the status of the manual chapters. It will be the responsibility of the manual holder or the person designated to keep the documents current to record this information on to the Check-List.

NATIONAL POPULATION COUNCIL



الجلسة الفوهمة للسكان

OPERATIONS PROCEDURAL MANUALS

Procedures Manuals are being prepared to assist the NPC staff carry out their responsibilities. It is eventually planned to have nine chapters covering all the main areas of NPC's management procedures. Each chapter will be put into use as soon as it is approved. There will eventually be complete volumes containing all nine chapters. In addition separate chapters or sub-sections covering a single subject will be distributed for use by the operating offices performing the functions covered in the particular chapter.

The check list below shows the subject areas to be covered and the current status of each chapter. As each chapter is approved all departments and offices will be notified and each manual holder should note the status of the chapter on this check list. As soon as the chapters are printed copies will be distributed to all operating offices in need of them. Request for additional copies can be made to the NPC/TS Administrative Manual Maintenance unit.

Chapter	Title	Date	Status of each chapter			
			Approved & Available	Final draft	Early draft	Not yet started
1	Organization & Communication		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Planning		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Training		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Finance		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Monitoring & Evaluation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Personnel		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Support Services		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Research		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Population Information Systems		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

APPENDIX B

AMENDMENT PROCEDURES AND FORMATS

**OUTLINE
FOR
CHAPTER 7**

SUPPORT SERVICES

Sub-Section on: Procedure Manual Maintenance

7.6 Procedure Manual Maintenance
Introduction

7.6.1 Organization

- (a) Establishment of Manual Maintenance Unit
- (b) Functions of Unit
- (c) Relationship to NPC/G Offices

7.6.2 Process

- (a) Distribution of Manuals
- (b) Training in use of Manuals
- (c) Analyzing Operational Consequences of Decrees
- (d) Amendment Memorandum
- (e) Change and Information Notices
- (f) Follow-up and Feed-Back

7.6.3 Procedures

- (a) Allocation of complete volumes
- (b) Allocation of single chapter
- (c) Keeping Manuals current
- (d) Re-issue and replacement of obsolete documents

7.6.4 Forms and Instructions

**Amendment Memorandum
for
NPC Procedures Manuals**

To:
From:
Date:
Subject:

Chapter to be amended: _____

Reference of initiating document: _____

Discussion:

Action required:

**Change and Information Notice
for
NPC Procedure Manuals**

Date:
Subject:
Chapter to be changed:

Discussion:

Action Required:

Summary of change to be included in manual.

Subject, Authority & Reference	Date	Cut along dotted line and staple summary into Manual Section __

APPENDIX C

COST INFORMATION

E. PETRICH AND ASSOCIATES, INC.

International Consultants in Management Development for the Health Services
مستشارون عالميون في التنمية الإدارية - خدمات الصحة

938 Cragmont Ave.
Berkeley, CA 94708
July 18, 1991

Jeff Ghidossi
Bindco
1000 Marina Blvd.
Suite 100
Brisbane, Ca 94005

COPY

Dear Mr Ghidossi:

You may recall I talked to you on the phone a couple of weeks ago about the Egyptian project that I am working on and our need to design a series of binders suitable for the procedures manuals we will be producing for the Government of Egypt.

As we discussed we need to get together when I have more information on the dimensions and specifics of our needs. While I do not have all the details I do have more information than when we first talked. For instance, the size of the paper they will use is the same as the paper this letter is written on. There will be eight chapters in all and they will range from about 30 to 100 pages in length. Fifty pages will probably be the average. They will need to have both stitch bound complete volumes and individual chapters in binders. These binders will need to have a three ring binder on one side to keep copies of amendments and new decrees that will come in from time to time and some means of keeping the basic document intact on the other side of the binder.

There are a few other requirements and options that would be desirable but I think it would be best to talk about the feasibility of these when we meet. I am going back to Cairo towards the middle of next month and one of my tasks will be to present the Government with some options on how to package these documents. I would like to meet briefly with you before I go and pick up some sample or examples (which we are perfectly willing to pay for) to take back with me.

If we could meet in your office at 3:00 pm on Friday July 26 to go over the project needs and the various options that might be available I would greatly appreciate it. My local phone number is (415) 528-0938. Please call me to confirm the time or work out another date if this is not convenient.

Sincerely,



1000 MARINA BLVD. SUITE 100 BRISBANE CA 94005 415/583-7788

August 7, 1991

Noel Marsh
EP&A
814 Grande Avenue
Arroyo Grande, CA 93420

Dear Noel,

Bindco pleased to provide the following quotation on a Binder.

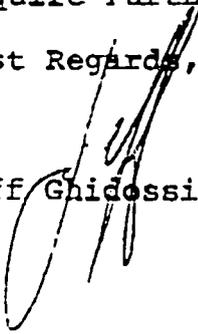
- 100 point chip board
- Silk-screened one color
- Pocket inside front cover 4" horizontal
- Pocket inside back cover full vertical
- 1" capacity round ring chrome metal with exposed rivets
- Round corners and standard liner
- 11 volumes
- Arrestox cloth or supported vinyl

Quantity-(sets)	250	500	1000
Vinyl-	\$5.96 ea	\$5.62 ea	\$5.41 ea
Cloth-	\$5.84 ea	\$5.11 ea	\$4.99 ea

Delivery 4 weeks from receipt of order. Shipped F.O.B.,
ORIGIN.

Thank you for the opportunity to submit pricing on the above item. I look forward to working with you. Should you require further information, please give me a call.

Best Regards,


Jeff Ghidossi

Notes on Price Quotation Obtained in Egypt

In August 1991 several Egyptian suppliers were contacted and samples of materials collected. Verbal price quotations were provided to the NPC/IDP office. These will need to be put in writing but it appears from the data available so far that there is a distinctive cost advantage to be gained by procuring locally. In addition the Egyptian products are designed to use the standard Egyptian size paper which has slightly different dimensions from the standard U.S. paper. The most competitive price estimate received for a quality product was LE 13 per binder based on a volume of 1500 units.

Samples of materials and more details on the suppliers contacted can be obtained from the NPC/IDP office.

APPENDIX C

STATUS OF INDIVIDUAL CHAPTERS

- Division of Labor and Work Focus Memo (Sept. 12, 1991)
- Division of Labor and Task Assignment Memo (Sept. 15, 1991)
- Notes on Work Assignment (Sept. 15, 1991)
- Chapter 1 Outline (Sept. 14, 1991)
- Chapter 2 Notes from Ismailia Office (Sept. 9, 1991)
- Ismailia Regional Workshop Letter (Sept. 16, 1991)
- Chapter 5 Memorandum Announcing the review of draft on Monitoring and Evaluation Manual Chapter

COPY

TO; Dr. Waleed

FROM: Noel Marsh *NM*

DATE: Sept 12, 1991

SUBJECT: Division of Labor and Work Focus
Between my Counterpart and Myself

Now that we have so many chapters in draft and at various stages in the clearance and approval process I think it will be more efficient if we divide the work up a little differently than the way we had to go about the tasks during the beginning phases of the project. To some degree we have already started to do this but there is now so much going on that I think it will be clearer and more organized if assign specific tasks and areas of responsibility and put them directly in to the work plans and the SOWs for iterum as well as the times of the visits. The need became even more apparent after our discussion with the Deputy Director General on September 11. Dr Salwa and I would of course maintain our normal counterpart working relationship but by dividing forces on some of the tasks I think more can be accomplished.

There is of cause the obvious division of tasks between those that are exclusively performed in Arabic and those that can be conducted in English or through a combination of the two. The draft chapters on Planning and Monitoring and Evaluation are now both at the stage where the next phase of the work requires getting the Arabic versions agreed upon and the making sure that whatever changes are made in Arabic are accurately included in the English version. There is a second task distinction that relates to the dynamics of the organization and the time it takes to clarify and sort out existing and changing organizational relationships. The working paper on Organization and Communications is the prime example of the latter. Finally there is the question of data gathering and there is no clearcut distinction for these. Some data can most easily be gathered by me while other information will be more effectively collected by Dr Salwa. The work plans will need to deal with these on a case by case basis.

I have prepared a suggested task division outline a copy of which is attached. I will discuss this with Dr Salwa before I leave. In this paper I have made suggestions on some of the approaches Dr Salwa may wish to try as she goes about the job of refining and validating the data we have assembled in the Organization and

5

Communications Working Paper. As she goes about reading the working paper to be converted to a chapter form she will need to record and gather information on some of the new ideas that the Deputy Director General wants to explore and introduce into the system. This paper should serve as a guide for dividing up the work flow over the next several months and help her carry out her assigned tasks over the next several weeks.

c.c.: Dr. Salwa

COPY

To; Dr. Salwa

From: Noel Marsh *N.M.*

Subject: Division of Labor and Tasks Assignments

Date: September 15, 1991

Attached is a copy of my memo to Dr Waleed discussing the status of the project and presenting some of the ideas we have discussed concerning the division of labor between us and the various task assignments over the next several weeks. Also attached is a short paper I promised to prepare for you on some suggested approaches to organize and prepare the material in the Organization and Communication Working Paper for conversion in to a Manual chapter. A reviewed outline of Chapter 1 is also included.

A forth attachment is the memo (both in Arabic and English) that Mr. Metwally prepared for us as a result of the field testing of the draft of chapter 2- Planning. You will need this as you work to incorporate the various comments of the Department Directors in the Arabic version or the draft chapter on planning. Since Metwally's memo references the page numbers in the Arabic version which do not correspond to the same page numbers in the English version I would appreciate getting or being sent the page numbers in the English version which his memo is addressing. This way I can be sure that I understand these very thoughtful and constructively critical observations. If you could give this to me before I leave it would be great but if not please Fax them as soon as you can.

Finally in my last meeting with Mrs. Samira, I gave her a revised English version of Chapter 4 that was the result of the detailed discussion we had during this trip. At this time it was agreed that the staff, who are familiar with the various financial forms would complete the Forms and Instructions section of Chapter 4 in Arabic and use the format I developed in section 4.6 describing all the steps needed to complete the forms under six subject headings. These headings are: Purpose, Timing and Frequency, Features, Persons Responsible, Copies and Procedures for Completing the Forms. There is no need to produce this text in English since it is strictly mechanical and factual and there are no technical issues involved. The forms to be described in this manner and included in the Manual are list at the end of section 4.6. If you could during my absence, follow-up from time to time with Mrs. Samira and let me know the progress being made I would appreciate it.

I also had copies made of the Organization and Communications

Working Paper material contained in my two trip reports so that when have to return the Project Directors copy of these reports you will have the information you need to carry out the tasks described in the memo and notes. I have attached these copies to this memo.

The time between my visits this time is quite short and we have a lot of active items to attend to; and may even have more after the meeting tomorrow with the Director General and the USAID Project Officer, but I think you should be able to move Chapter 2 to, or close to, the point of final review and approval and also make substantial progress on developing and expanding the Working Paper.

c.c.: Dr. Waleed Alkhateeb

E. PETRICH AND ASSOCIATES, INC.

International Consultants in Management Development for the Health Services
مستشارون عالميون في التنمية الإدارية - خدمات الصحة

NOTES ON WORK ASSIGNMENT.

TO: DR. SALWA

FROM: NOEL MARSH *MM*

COPY

For the balance of this visit I will need to continue to work with Mrs Samera on completing the final technical review of the Finance chapter, continuing to gather data for the Training chapter, getting the necessary data needed to revise the Presentation "mini report" and finishing up on the preparation work needed to prepare the Trip Reports.

The items that I will be working on during the interim period between trips will be covered in the scope of work that will be prepared before my departure on Sept 20 are consistent with this proposed division of labor.

During these last few days of this visit, the interviewing time between the next trip and probably considerably beyond, you will be discussing the latest Arabic draft of the Planning chapter and summarizing the comments she receives so I can review these at a later date. The meeting to review the first draft and outline of the Monitoring and Evaluation chapter has been postponed until Sept 18 which leaves little time to do more than record the comments so they can be analyzed and reacted to in the future. Since I understand the concerned Directors have problems with the current draft it will undoubtedly require you to hold individual meetings with them so she can feedback the substance of their concerns to me and to the Resident Advisor. Both of these tasks could be quite time consuming and may well encroach on the amount of time she will have to work on the primary task for the interim period between visits; namely getting the Organizational Working Paper in shape to work on during the next visit.

There is a lot of work to be done in this area before we can actually get to the stage of going about the task of creating a useable and practical procedures manual. Most of the information in the Working Paper relates to the existing structure of the organization and some of the more recent changes, such as the establishment of the Foreign Agreements Department. However, as we heard from Mr. Saleh things may change. I look forward to taking with me or being sent a translation of the new organizational chart that Mr Saleh showed us at the meeting. I am not sure of the status of this document but assuming that this must be an up to date reflection of his current thinking also judging from his remarks this could be a key document for our future work on Chapter 1. The fact that he stated that he was interested in organizing and rationalizing the various support functions that the TS provides to the Governorate Offices and wanted to get more directly involved in supporting the work of the NPC/G Offices was very encouraging and should present both a challenge and an opportunity for us as we go

62

about helping NPC implement this project.

Turning now to the specifics of the work assignments I have put together some possible ways of approaching the task of organizing and developing the materials that will be needed. I have also prepared and attached a revised, but still tentative, outline for the chapter. This also may serve as a guide to organize and begin to sort out the data into a more useable form.

One initial approach that might be tried would be to sort out the various functions described in the Working Paper which is contained in the appendixes of the Oct/Nov 1990 and the May 1991 Trip Reports (also see note below) into the functional lay-out of this new chart. If this can be done it may give us some clues on plans that are in the making to redistribute some of the functions between departments. A second approach would be to simply record some of the ideas that the Director General is putting out so that on the next visit we can analyze these and develop recommendations based on these ideas, sound management practices and the reality of the existing structure.

Finally if all this material can be distributed, with care being taken to keep track of the source and origin of the information, in to folders that correspond to the proposed section heading of the chapter it could facilitate our future work.

Since the time between my visits this time is quite short the amount that can be spent preparing this information for eventual integration into a manual format will be limited. Not all of these suggested approaches may turn out to be feasible or fruitful but we will not know until we have tried them. Over the next few weeks we should keep going back and reminding ourselves of the main short run purpose of this effort is to record and organize the information, feedback, comments and suggestions by FUNCTION so we will be able to relate these to whatever organizational structure begins to emerge as the new leadership management style and philosophy begins to take hold.

Hope these general guidelines will be useful. I can always be reached by Fax if the are specific issues that I need to respond to. While the information in the working paper sometimes seems confusing and things often appear to be in a state of flux I feel more optimistic than ever that we are getting to a point where we will be able to produce a useful chapter 1 manual and in the process develop some practical and helpful recommendations.

Good luck!

c.c. Dr. Waleed

SEPT 14, 1991

CHAPTER 1 ORGANIZATION AND COMMUNICATION

OUTLINE

1.1 Introduction

- 1.1.1 Origin and history of NPC
- 1.1.2 Mission and role of NPC
- 1.1.3 Summary of NPCs management structure
- 1.1.4 Nature and purpose of Procedures Manuals

1.2 Functional Responsibilities

1.2.1 Technical Secretariat

- 1.2.1.1 Operational and Coordinating
- 1.2.1.2 Internal Management
- 1.2.1.3 Support and Administrative
- 1.2.1.4 Supervisory

1.2.2 Governorate Offices

- 1.2.2.1 Coordinating

64

1.2.2.2 Reporting and Follow-up

1.2.2.3 Implementation

1.2.2.4 Promotional

1.3 Organization

(how NPC is organized to carry out these functions)

1.3.1 Office of the Director General

1.3.2 The Technical Secretariat (TS)
(including Dept. Descriptions)

1.3.3 The Governorate Offices

1.3.4 Specialized Committees

1.3.5 National and Regional Population Councils

1.4 Communications Procedures for the TS

1.4.1 Between the TS and the Office of the Dir. Gen.

1.4.2 Internally within the Secretariat

1.4.3 Between the TS and the Central Ministries and
Agencies

1.4.4 Between the TS and the Foreign Agreement Agencies

1.4.5 Between the TS and the Governorate Offices

65

1.5 Communications Procedures for the Governorate Offices

1.5.1 Between the NPC/G Office and the Regional Council

1.5.2 Between the NPC/G Office and the Implementing Agencies

1.5.3 Between the NPC/G Offices and the Regional Sector Directors

1.5.6 Between the NPC/G Offices and the TS

1.6 Forms and Instructions

NATIONAL POPULATION COUNCIL

ISMAILIA OFFICE

SUGGESTIONS AND OPINIONS FOR THE MEMBERS OF THE LOCAL
WORKSHOP CONCERNING THE PLANNING REPORT
IN THE SUGGESTED WORK DIRECTORY

It was agreed that the language of the section "Translation" was not up to the standard.

Parts of this section are illogical to what is happening in the locals. By then It is supposing that the local organization in the governorates is informed about their financial resources which has the central level in the ministries " Presidential, and it is not true because the local organization knows nothing about its special funds. Thereafter it is difficult to put an annual plan to the directorate because the service governors are informed suddenly and by order " You must execute the press activities around fixed amount within the next period" 3 months" per example.

Requirements: The central presidential level (Ministries) must provide the locals with their special activity budget to let it preparing it annual plans. (Page 3).

Concerning page 4 in the report, the last paragraph, we think that it is illogical because we know that almost the ministries don't have funds to execute their population plans and activities on the local level in the governorates.

In page 5 we add on no. 1 from the essential steps the following:

- * Thenafter the population regional council suggestions in the governorates must be obligated by the local organization to anticipate in the local plan.
- * Concerning page 6 item 4, it is illogical because the regional council has not to return back the plan models to the central ministry before execution.
- * Repetition of many items as been done in item 5 page 6.
- * Concerning page 8 2/2/5 cooperation, the community see this form needs to be modified because we can replace the endowments manager instead the social population affairs manager with . Also the commission will be directed by Mr. Government General Assistant Secretary instead the General Secretary.
- * In page 16 (D) it was noticed an item that Sharkia will be used as a model and it was not included in, also, concerning page 33 item 2 for the plan modifications model (It is not included)

The workshop members suggested the following:

1. A local workshop is needed to be held and to be attended by the Regional council members in the governorates to discuss how to prepare a local plan which can be execute through the experts for the National Population Council and The Development Institutes Project within 4 days. (Details with Mr. Marichell)...
2. The Central Level must determine the financial relation needed to execute the plan in meantime the year. The fund should not be annual quarterly as is happening now.
3. If there is a central financial for the family and population planning activities, the family and population regional council in the governorates and its representative shall create their own special account to give the chance to coordinate and prepare the local plan with it true cost and give the chance to get offers if possible.
4. The recommendations of the population regional council must be undertaken to all the local organization cooperated in the population activities.
5. The "Practice Models" offer was refused from other directorates because this will limit the mentation. (Sterio-types) and will destroy any creation or new thoughts from any governorate or any other people.

Any way this directory as soon as it will be complete will be very useful for all the workers in the Population and Family Planning branch on the local level in the governorates.

Best Regards,

Mohamed El Sayed Metwaly
Ismailia Office Manager

بِسْمِ اللَّهِ الرَّحْمَنِ الرَّحِيمِ



الجلسة الفوقية للسكان

مكتب الإسماعيلية

بريد الشيخ زايد (٤١٥١٦)

تلفون ٢٢٢٢٠٦ (٠٦٤)

مقترحات وإراءات وأراء ورشة العمل المحلية
بالنسبة للملزمة القادمة بالتخطيط من دليل العمل المقترح

x كان هناك اجتماع على ان لغة الملزمة " الترتيبه " ليست على المستوى المطلوب

:: يوجد في بعض اجراء الملزمة تدوير غير واقعي لما يعدت في العمليات فمثلا يفترض الكاتب ان
الاجهزه المحليه بالمحافظات لديها علم ومعرفة بالموارد والمخزونات الماليه المتاحه لسدى
المستوى المركزى بالوزارات " الرئاسه وهذا غير صحيح حيث ان الاجهزه المحليه لا تملك
شيئا من معلوماتها الطاليه وعلى ذلك يصعب وضع خداه سنويه للمحافظه حيث يتم بمسح
مديريات الخدمات بشكى فجائى وبسيخه الامر " مطلوب تنفيذ أنشطة اعلاميه في حدود مبلغ
كذا نيه من قبل المداه القادمه " ٣ شهور " مثلا

والمطلوب : ان المستوى الرئاسى المركزى " الوزارات " تزويد العمليات بالميزانيا القادمه
ممنوع بانها حتى يمكنها اعداد خطتها السنويه (ص ٣)

:: بالنسبه لمدفعه رقم ٤ من الملزمة الفتره الاخيريه نعتقد ان ما جاء بها كلام غير واقعي حيث
اننا نعلم ان اعداد الوزارات لديها اعتمادات لتنفيذ الخدله والانشاله السكانيه على
المستوى المحلي بالمحافظات . .

x بالنسبه لمدفعه رقم ٥ نرى على رقم ١ من الخدوات أساسيه ما يلي :

" على ان تكون مقترحات المجلس الاقليمى للسكان بالمحافظه ملزمه لادجهزه المحليه
المشاركه في الخداه المحليه

x بالنسبه لمدفعه ٦ بند ٤ ما جاء به لا يحدث في الواقع حيث لا يقوم المجلس الاقليمى باعداد
نماذج الخداه لوزاره المرزبه نفس التنفيذ

x هناك قرار للتشريع من البنود كما جاء بالبند ٥ ص ٦ من الملزمه

x بالنسبه لمدفعه ٨ ٥ / ٧ / ٧ المشاركة فترى المجموعه ان هذا التمثيلى بحاجة الى تعديل
حيث يمكن استبدال مدير الاسكان المشور الاجتماعيه (٥) . .
والمافه مدير الاوقاف . . و جعل اللجنه برئاسة السيد / سكرتير عام المحافظه المساعد بدو



الجلسة القومية للسكان

مكتب الإسمايلية

من السكرتير العام

بريد الشيخ زايد (١١٥١٦)

تليفون ٠٢٢٣٠٦ (١٠٦١)

× ن ص ١٦ (د) تم ذكر ان هناك عينه باستخدام الشرقيه كمثل (وهو غير موجود وكذلك الحان بالنسبه لصفحة ٣٣ بند ٢ الخاص بنموذج تعديلات الخطه (لا يوجد مرفق عينه)

x x

وقد اقترح أعضاء الورشه ما يلي :

١- مطلوب عقد ورشة عمل محليه يحضرها أعضاء المجلس الاقليمي للسكان بالمحافظة على اسلوب اعداد خدلة محليه يتم تنفيذها بمعرفة خبراء المجلس القوي للسكان ومشروع التنمية المؤسسيه لمدة اربعة ايام " تفصيلها مع مستر مارشان " . .

١- المطلوب المستوى المركزي تحديد الارتباط المالي اللازم حتى يمكن تنفيذ الخطه على مدار العام ولا يكون التمويل ربع سنوي كما هو حادث الان . .

٢- اذا كان هناك تمويل مركزي لانشطة تنظيم الاسره والسكان فيجب ان يصعب فسي السبل الاقليمي للسكان بالمحافظة والذي يقوم بدورة بانشاء حساب خاص به لاتاحة الفرصه للتنسيق واعداد الخطه المحليه بتكلفتها الحقيقيه واتاحة الفرصه لتبرعات ان وجدت . .

٤- تكون توصيات المجلس الاقليمي للسكان بالمحافظة ملزمه لكن الاجهزه المحليه المشاركة في الانشطة السكانيه .

٥- رفق عرض " امثلة تليبيقيه " من محافظات اخرى لان ذلك سيجعل هناك قيود على التفكير وسيجعله نمطيا (Stereo - types) .
وسيقبل على اي ابداع او فكر جديد يمكن الخروج به من محافظات اخرى او من اشخاص اخرين . .

:: وعلى كل حال فان هذا الدليل عند اكتماله سيكون مفيداً للغاية لكن العاملين من مجال تنظيم الاسره والسكان على المستوى المحلي بالمحافظات

مع قبول اعليب التحيه

مدير مكتب الاسمايلية

(محمد السيد متولسى)

COPY

September 16, 1991

Mr. Mohamed Metwally
Director of NPC/Government Office
Ismailia Governorate
P.O. Box 41516
El Sheikh Zayed P.B.

Subject: Ismailia Regional Workshop.

Dear Mohamed,

When I returned to Cairo after our meeting I spoke to Dr. Waleed about the idea of holding a regional workshop in Ismailia using the Planning manual chapter to achieve three objectives: 1) Training in the concept and use of the Procedures Manual, 2) developing a well throughout and practical plan as one office products to come out of this workshop, and 3) familiarize the council members, especially the new city and village representatives with NPC's planning process.

Dr. Waleed thought it was an excellent idea. We are now considering doing this in a number of governorates for each chapter of the manual as it is produced. As we anticipated, however, holding this work shop in November would not give sufficient time to prepare. There are, as you know, already two workshops scheduled for November and would not be feasible to try and do a third one in the same month.

Part of my task assignment between the end of this trip and the beginning of the next visit will be to develop this idea into a proposal and work plan. When I return in November I will be participating in both Alexandria training workshop for one or two days. We should have an opportunity to talk about scheduling at that time.

As always it was a pleasure to work with you and I feel we accomplished a lot and developed some good ideas for the future. I reviewed your excellent notes on the planning chapters field test with Waleed and we will be considering all these points as we revise the chapter. Will look forward to seeing you in Alexandria in November.

Best Regards,

Noel Marsh



c.c.: Dr. Waleed Alkhateeb,
Resident Management Advisor - NPC/IDP

NATIONAL POPULATION COUNCIL
DEVELOPMENT INSTITUTIONAL PROJECT

MEMORANDUM

Mr. Maher Waked
Manager of Reformation
And Follow up National Department

Reference: The first draft for reformation and follow up
chapter about the NPC operations directory.

Subject: The copy attached to this memorandum, chapter 5 (Follow
up and reformations for your review and your comments.

This copy is a primary or first draft. It is noticed that most of
the operations are not actually described. Now we are going to
collect the information required to write the operations in details
to be inserted in the second copy of this chapter.

Your review and your comments are very important to submit this
directory. By then, a meeting will be held to discuss this chapter
on Sunday 15/9/1991 in the Project meeting room, 5th floor. We will
be grateful if you will attend this meeting for your discussion and
your comments.

Very Truly Yours,

A.D. Talaat El Kassaby
Development Institutional Project Manager

مذكرة

الى السيد الاستاذ / ماهر واكد
رئيس الادارة العامة للمتابعة والتقييم

بشأن : المسودة الجديدة لفصل المتابعة والتقييم من دليل العمليات للمجلس
القومي للسكان .

الموضوع : بخصوص النسخة العرفية بهذه المذكرة الفصل الخامس (المتابعة والتقييم)
لمراجعتكم وتدقيقكم واهداء الرأي .

هذه النسخة هي عبارة عن مسودة أولية أو مبدئية ومن الملاحظ أن أكثر العمليات
لم يتم شرحها حاليا . ونحن الان في صدد جمع المعلومات اللازمة لكتابة
العمليات بالتفصيل لسردها في النسخة الثانية من هذا الفصل .

سوف تكون مراجعتكم وآراءكم ذات أهمية قصوى لاجراء هذا الدليل وطني
ذلك فان سوف يكون هناك اجتماع لمناقشة هذا الفصل يوم الاحد الموافق ١٥ / ١٠ /
في قاعة اجتماعات المشروع بالدور الارضي وتكون شاكرين اكم بحضور الاجتماع للمناقشة
واهداء الرأي .

وتفضلوا بقبول فائق الاحترام

طهر
شروع التتمية التشريعية
(أ. د. طلعت التميمي)

تحريرا في ٤ / ٩ / ١٩٩١ .

صوره الى الاستاذ /

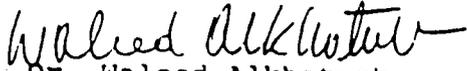
APPENDIX D
FOLLOW-ON SCOPE OF WORK

E. PETRICH AND ASSOCIATES, INC.

International Consultants in Management Development for the Health Services
مستشارون عالميون في التنمية الإدارية - خدمات الصحة

ACTION MEMORANDUM

To: Ms. Amani Selim
HRD/POP - USAID Cairo
IDP Project Office

From: 
Dr. Waleed Alkhateeb
IDP Resident Advisor

Date: September 16, 1991

Subject: Follow on SOW for IDP Consultant

Following the usual practice designed to maintain the momentum of the project we have prepared the follow-on scope of work for the visiting consultant prior to his departure. Your approval is requested.

CONSULTANT: Noel Marsh

PROPOSED DATES OF NEXT VISIT: Oct. 29 to Nov. 26, 1991

A. Work to be done during the interim period between visits:

1. Complete the design of the new budget forms and instructions based on the final technical review of the

Finance Chapter (4).

2. Prepare suggested responses and appropriate text to be included in the next revision of the Planning Chapter based on the comments and suggestions resulting from the continued review of this draft chapter.
3. Revise the report on the Presentation and Format of the Manuals to include the Egyptian cost data obtained on the Aug/Sept. visit.
4. Begin organizing drafting material for Chapter 3 - Training and revise and expand the draft and outline of Chapter 5 - Monitoring and Evaluation, for discussion during the next visit.
5. Develop a proposal and work plan based on the idea that was discussed in Ismailia of holding regional level workshops to introduce each chapter of the manuals as they are produced. Also prepare suggested work assignments to get feedback on the current work in progress from the NPC/G Office Directors attending the two workshops scheduled in Alexandria for November.
6. Follow-up and provide comments and suggestions on any work transmitted or communications by the counterpart with respect to her work on Chapter 1 -Organization and

3. Work with the NPC Director of Finance to prepare Chapter 4 - Finance, for final review and approval.
4. Work with the NPC Director of Planning to prepare Chapter 2 - Plannig, for final review and approval.
5. Participate in the presentation and work assignment on the Procedures Manuals which will be part of the program during the first of the two NPC/G Office Directors workshop scheduled for November.
6. Participate in the session of the second NPC/G training workshop where the participants present their finding and discuss the results of the workshop assignment handed out in the first workshop and use this feedback data to further develop the manual chapters.

Approved by A. Sel Date 07/17/91

USAID Project
Officers