

PD-ABE-639

E. PETRICH AND ASSOCIATES, INC.

ISN. 80117

**FINAL REPORT**

**TECHNICAL ASSISTANCE ACTIVITIES AND ACHIEVEMENTS**

**OF**

**E. PETRICH AND ASSOCIATES, INC.**

**IN SUPPORT OF THE USAID SPONSORED**

**INSTITUTIONAL DEVELOPMENT PROJECT**

**OF THE**

**EGYPTIAN NATIONAL POPULATION COUNCIL**

**FOR THE PERIOD MAY 1988 THROUGH DECEMBER 1990.**

**IN PARTIAL FULFILLMENT OF SUBCONTRACT NO. 5588 WITH :**

**FAMILY HEALTH INTERNATIONAL**

**RESEARCH TRIANGLE PARK**

**NORTH CAROLINA, U.S.A.**

**FEBRUARY 28, 1991**

## PREFACE

On behalf of the staff and consultants of E. Petrich and Associates, Inc., I wish to express our most sincere appreciation to the officers and staff of Family Health International for the excellent guidance and support that they have provided during the entire two and one-half years of this initial sub-contract, May 1988 through December 1990.

Our close collaborative working relationship has produced, what we believe to be, major progress in the institutional development of the Egyptian national family planning program, including the development of Egypt's National Population Council. While much work remains to be done to achieve full Egyptian self-sufficiency in population research, planning and management, a solid foundation of institutional development has occurred.

We also have been privileged to work with a group of highly capable and dedicated Egyptian counterparts and USAID Population Officers who have allowed us the opportunity to fully exercise our analytical and systems design skills, who have patiently listened to our counsel, and who have been willing to make difficult decisions based on our counsel. Their strong commitment to achieving maximum impact from limited development resources has greatly helped to facilitate the development progress. We thank them, one and all, for such grand support and for their dedication to the development goals of Egypt, which we sincerely share.

Ernest E. Petrich  
Senior Consultant

## TABLE OF CONTENTS

	Page
1. Executive Summary.....	5
2. Background.....	6
3. EP&A Activities and Achievements.....	8
3.1 Project Management.....	8
3.2 Project Designs/Redesigns.....	10
3.3 Organizational and Systems Research.....	12
3.4 Training.....	13
4. Issues and Development Work Remaining.....	14
4.1 Information Systems Development.....	14
4.2 Systems Applications and Refinements.....	14
4.3 Technical Skills Development.....	15
4.4 Management Skills Development.....	15
4.5 Institutionalization.....	15
4.6 Development Project Planning, Marketing and Evaluation.....	16
5. Conclusion.....	17

## Appendices

- A. FHI/EP&A Subcontract
- B. EP&A Technical Assistance Level of Effort
- C. EP&A Financial Report-Budget Versus Actual Expenditures
- D. Summary of EP&A Consulting Trips
- E. Bibliography of Major Documents Produced Through Technical Assistance

**LIST OF ABBREVIATIONS**

A.I.D.	Agency for International Development
CYP	Couple Year of Protection
CBT	Competency-Based Training
DSG	Development Support Grant
FP	Family Planning
FY	Fiscal Year
GOE	Government of Egypt
IA	Implementing Agencies
IEC	Information, Education and Communication
IDP	Institutional Development Project
MIS	Management Information System
MWRA	Married Women of Reproductive Age
NPC	National Population Council
NPC/G	NPC Governorate Office
NPC/TS	NPC Technical Secretariat
OR	Operations Research
PDS	Population Data System
PIC	Population Information Center
PIS	Population Information System
TA	Technical Assistance
TOT	Training of Trainers
UNFPA	United Nations Fund for Population Activities
USAID	United States Agency for International Development

## 1. EXECUTIVE SUMMARY

Under subcontract to FHI, EP&A staff and consultants have been providing technical assistance to the Egyptian National Population Council since mid-1988. This assistance has included organizational and systems research and design, training, and project evaluation and design of USAID/GOE supported projects in Egypt, including several redesign exercises for the NPC/IDP Project.

The first two years of effort were devoted primarily to developing NPC's project management infrastructure and capabilities in order that it could effectively implement the IDP. This included adequate staffing of project management positions, one-on-one counseling and training, and the development of project implementation planning, budgeting and monitoring procedures and formats. By January of 1990, a central Project office had been established, a long-term foreign resident advisor appointed, and Project planning and monitoring capabilities established.

During 1990 much progress was achieved in research and design, and in training. Attitudes of NPC staff, as well as their knowledge and skills, were improved dramatically and the NPC began showing signs of viability. Governorate level population plans began to be prepared. The current national five-year population plan was updated on the basis of improved information provided by governorates and special research studies.

As NPC staff awareness developed about their own needs for development, and about the types of cost-effective institutional development methods needed, the Project design was revised until we now have a fourth and, what should be, final version. It calls for: major future effort in operations research; developing of a population information system to support improved planning, monitoring and evaluation at governorate and national levels; further refinements in NPC organizational and systems design; additional technical and managerial training; and further work to institutionalize project development gains.

Although Project implementation began slowly, and was adversely impacted by the several stops and restarts of project redesigns, full implementation momentum has now been achieved and all parties to the development effort are optimistic about achieving Project objectives by the end-of-Project period, May 1993.

## 2. BACKGROUND

The jointly supported USAID/GOE NPC Institutional Development Project (IDP) was initiated in 1988 to provide overall institutional strengthening to Egypt's national population program, especially with respect to population research, planning and evaluation, for which the National Population Council has principal responsibility.

The overall goal of IDP is to contribute to a reduction in the Egyptian birthrate by assisting the Government of Egypt to meet its goal of reducing population growth rate to 2.1 by the year 2001 while increasing contraceptive prevalence to at least 51% during this same time period.

The specific purpose of the IDP is to strengthen the capacity of NPC to formulate and promote policies on population and family planning, develop comprehensive multi-year and annual plans; monitor, coordinate and evaluate the work of family planning implementing agencies; and plan and manage research, information, training and other support services necessary to develop and sustain the above functions.

Specific outputs of the IDP include strengthened NPC functions in:

- Policy Research, Analysis and Formulation
- Multi-year and Annual Planning
- Program Monitoring, Coordination and Evaluation
- Information Management
- Research Management
- Training Management and Training

The Project is directed by the NPC Secretary General with day-to-day project management responsibilities delegated to a Project Director and other senior Project officers.

In 1986 USAID was invited by the GOE to assist in designing and funding this major project of building NPC into its intended role of the population leadership organization in Egypt. At that time, the NPC was suffering from the following organizational pathologies:

- A large percentage of field positions vacant and unfilled;

- Serious over-dependence on part-time and/or temporary personnel, particularly scientific personnel, including temporary staff from university and other outside organizations and secondments from implementing agencies;
- Over-dependence on ad hoc task groups, and local and foreign consultants, to perform NPC technical functions which require continuity and follow-through capability that only full-time permanent staff can adequately perform;
- Over-centralization of authorities, responsibilities, functions and staffing;
- Fragmented and ill-coordinated activities;
- Generally poor management throughout the organization. No effective work activity planning, little sense of priorities for research, and other critically needed national functions, and an inability to efficiently and effectively utilize allocated resources to achieve NPC goals and objectives;
- A general malaise of poor morale and low productivity in which little work was being done.

Family Health International, by virtue of its excellent reputation in Egypt, was requested by the NPC Secretary General and by USAID/Cairo to mobilize technical assistance in support of the NPC development initiative. Since consultants of E. Petrich and Associates, Inc. had been previously involved in sector assessment and project design activities in Egypt, they were also invited to participate (as a subcontractor to FHI), in the NPC development effort. Pre-subcontract activities of EP&A included an institutional assessment of the NPC and preparation of the initial IDP Project Paper to support joint GOE/USAID funding of the project.

Technical assistance support to the IDP was divided between FHI and EP&A staff and consultants according to their respective areas of expertise, with FHI taking responsibility for research planning, design, training and evaluation, and EP&A taking responsibility for institutional systems research, design, training and evaluation.

See Appendix A for a complete copy of the EP&A subcontract, including Scope of Work and Budget.

In summary, FHI called upon EP&A to assist with the following project technical assistance inputs:

- Operations and Systems research involving organizational and management systems.

- Training applications covering the results of operations and systems research.
- Updating project redesign of the IDP as changing circumstances required, and detailed project implementation planning, monitoring and evaluation.
- Assistance to USAID and various other Egyptian FP organizations in organizational research, evaluation and development project design under the umbrella of the IDP.

Although the IDP has undergone an annual redesign and the Project Paper is now in its fourth version, the basic institutional development strategy and the overall technical assistance approach has undergone very little change. As NPC has developed organizationally and functionally, the technical assistance provided has become more sophisticated and levels of effort and related budgets have been modified, with Egyptian consultants and NPC staff more recently taking on greater responsibilities and having greater impact. This represents a true test of successful institutional development efforts.

### **3. EP&A ACTIVITIES AND ACHIEVEMENTS**

Project implementation began in 1988 under very difficult conditions due to a serious shortage of staff assigned to the project and their general lack of project planning and management capabilities. The NPC had been essentially non-functional for several years in a transitional hiatus period. Many talented and motivated staff had left and existing staff were unproductive from lack of direction and loss of motivation. Consequently, EP&A consultants were pressed to focus on basic issues of getting NPC to mobilize counterparts and perform project implementation planning and budgeting which was needed to meet USAID prerequisite requirements for beginning the flow of project funds.

#### **3.1 PROJECT MANAGEMENT**

EP&A technical assistance during the first project year was aimed at developing NPC staff capabilities in project management, beginning with the writing and updating of detailed project implementation work plans and budgets. Since NPC staff had not previously performed work activity planning, their knowledge, skills, as well as their attitudes, had to be developed. This was achieved through one-on-one tutorial consultant/counterpart planning sessions in which NPC staff would serve as decision-makers on activities and sub-activities required and the lead-time estimates to achieve each activity or sub-activity, with consultants serving as advisors. Tendencies of under- and over-simplifying tasks to be performed and the time required to perform them, resulted in the need to routinely update implementation plans every quarter of the year.

While this was a time-consuming activity for NPC staff and consultants, NPC staff gained some capability to perform work activity planning during the first two project years and now have the capability to perform these tasks with a minimum of assistance.

A relatively high turnover in NPC project management staff during the first two project years resulted in the continuing need to train replacement staff; however, the training given to a larger number of staff than originally planned has resulted in more project planning capability, and therefore program planning capability within NPC at large than would otherwise currently exist. An understanding and ability to use quantifiable output measures and time-sequenced targets, as well as improved capabilities in translating outputs into resource input requirements, is now showing marked improvements in overall NPC management.

The formal monitoring of project implementation progress against implementation plan targets by NPC staff assisted by EP&A consultants also required several years of learning and practice. This served to sensitize NPC staff in the development of more realistic implementation plans.

EP&A consultants initially assisted with establishing formal project monitoring practices and formats for quarterly reporting of implementation progress and in the conduct of joint USAID/NPC quarterly progress review meetings.

Delegation, supervision and follow-up of project implementation activities was particularly weak during the initial year of the Project. A multitude of organizational barriers to "getting things done" were identified during 1988 and 1989 by EP&A consultants and recommendations offered to correct or at least minimize these obstacles to implementation. This included the granting of greater delegations from the NPC Secretary General to the Project Director to authorize financial transactions without which activities could not be implemented. Highly cumbersome action approval procedures involving large numbers of staff were streamlined. Thus actions taken to make project implementation possible simultaneously improved general management of the overall NPC program.

As development actions began to occur in both the project and the program, attitudes of NPC staff began to slowly change. Staff began to realize that development actions might be possible, and while this took several years to achieve, the attitudinal change represented a critical breakthrough in morale-building. This, in turn, favorably influenced staff attitudes towards the IDP and its FHI/EP&A consultants. Initially foreign consultants were not particularly favored by NPC staff, they began to be increasingly requested. Technical assistance levels of effort and budgets began to be increased as an awakening developed about the usefulness of consultants.

In late 1989, an EP&A long-term resident consultant was requested since short-term consultants could no longer satisfy the increased NPC demand for assistance. A resident advisor began work in January 1990.

While the EP&A resident advisor and other consultants continue to assist NPC staff in project implementation planning and monitoring, there is a growing capability and self-confidence in this area which should lead to complete self-sufficiency in the next year or so.

Over the two-and-one-half year project period covered by this report, there has been a growing awareness by NPC staff about the importance of sound project management practices and its relationship to overall project success. This has led to the development of a much more appropriately staffed and organized central Project office. The initial project design provided for only one full-time project management person, the Project Director. By the fourth version of the Project Paper, a full complement of project manager specialists was requested by the NPC and subsequently implemented, including specialists for managing the development of the planning, monitoring, evaluating, information, research and training systems. The EP&A Resident Advisor and EP&A consultants assisted in the orientation and training of these Project Managers, and in the development of their operational policies and procedures.

By December 1990, a sound project management team and system had been established, with growing competence of NPC staff in project management capabilities.

### 3.2 PROJECT DESIGNS/REDESIGNS

At the time the initial IDP Project Paper was written, the NPC Secretary General and USAID population officers envisaged a USAID supported project that would be secondary and subordinate to a number of UNFPA projects then underway to assist with the institutional development of NPC. By mid-1989 it was clear to NPC and to USAID that expectations about the UNFPA projects were not being met. This was due to a number of factors, including superficiality of coverage and impact, fragmentation of effort and too-limited funding and technical assistance inputs. As most of the UNFPA projects were coming to a close in 1989 and 1990, they were not continued. This shifted primary dependence for NPC development to the USAID IDP. As this shift occurred, it required repeated revisions of the Project Paper, thus a current fourth revision. Over the first two Project years, NPC staff also gained a better understanding of institutional development methods that initially they were reluctant to accept from their foreign technical advisors.

Patience by FHI/EP&A consultants and their willingness to keep advising counterparts until enlightenment eventually occurred, has contributed greatly to changes in attitudes by NPC staff and to the current institutional development success being experienced.

The initial IDP focused entirely upon developing NPC/TS capabilities without directly addressing NPC/G development needs. The second revision of the Project Paper began to incorporate the needs of the NPC/G offices, while reducing emphasis on population research which UNFPA was to stress and support. The third revision of the Project Paper greatly reduced inputs to institutionally develop the NPC/TS and gave major emphasis to developing decentralized NPC/G capabilities, since UNFPA was to give greater emphasis to NPC/TS development needs. Finally, the current fourth and what should be the final version, provided for a balanced approach to overall NPC development, focusing on both NPC/TS and NPC/G development. It stresses the development of a rationalized population information system (PIS) that UNFPA had assisted with but was then phasing down and which had become a critical need to support improved planning, monitoring and evaluation functions.

Also, USAID supported research was reinstated with a redirection of emphasis from bio-medical to operations research, including the development of OR capabilities by implementing agencies working in the population sector.

EP&A consultants were called upon by NPC and USAID to rewrite the Project Paper as revisions were deemed necessary. This history of Project redesign had some negative impact on Project implementation progress due to the stops and restarts experienced; however, redesign efforts were done in a highly collaborative way that served as opportunity for EP&A consultants to educate NPC staff about institutional development strategies and methods that are now working very well.

The initial IDP focused specifically on NPC development, but with each subsequent revision widened its scope to include technical assistance for implementing agencies in certain specialized areas not otherwise provided for in USAID funded IA projects, particularly in development of research capabilities, in financial research and analysis, and in the evaluation, design and redesign of the development projects themselves. Consequently, EP&A consultants were called upon to evaluate other joint USAID/GOE population sector projects (e.g. Cairo Health Organization Family Planning Project and the Egyptian Health Insurance Organization Family Planning Project), and to design various family planning development projects at USAID/NPC request. These included projects for:

- Egyptian Junior Medical Doctors Association (EJMDA)
- Teaching Hospital Organization (THO)

- Cairo Health Organization (CHO)
- Egyptian Health Insurance Organization (HIO)
- Egyptian Military (Not funded)
- Ain Shams University Regional Training Center
- Al Azhar University International Islamic Center
- Coptic Evangelical Organization for Social Services (CEOSS)

Also, EP&A consultants were regularly called upon by USAID and NPC to review and critique other project design activities and papers, and to generally assist NPC and USAID in various analytical and design exercises in support of the overall population program in Egypt. Both USAID and NPC considered these activities as appropriate under the umbrella of the IDP. In performing these varied technical assistance activities, EP&A consultants were expected to serve as "role models" for NPC staff who are expected to eventually become self-sufficient in development research, planning, project design and evaluation for Egypt's population sector.

### 3.3 ORGANIZATIONAL AND SYSTEMS RESEARCH

The initial IDP design called for the utilization of an Egyptian consulting group to perform organizational and systems studies for the purpose of designing and installing a viable organizational structure and support system for NPC. During the first project year, TEAM Misr was selected in competitive bidding and carried out an overall organizational assessment, producing a report recommending broad restructuring. EP&A consultants assisted in this effort by orienting TEAM Misr consultants to the IDP and NPC and serving as sounding boards in the formulation of recommendations.

While the TEAM Misr report was helpful in providing suggestions on general issues, it did not result in the degree of specificity needed to guide formulation of operating policies and procedures for each of the various NPC/TS units nor for NPC/G offices. Consequently, EP&A consultants were requested to conduct detailed organizational and systems research as the first step in producing what is intended to be standardized operating policies and procedures for the entire NPC organization and its sub-units. Initially, in depth studies were conducted of the NPC/TS training and research units, followed by other studies. Updated and more complete staffing plans and position descriptions were prepared. As of December 1990, research was being conducted of NPC/G offices and the development of a standardized operations manual for these offices was in progress.

Ultimately, standardized operations manuals will be produced for all NPC units, and these will be utilized for pre-service and in-service training, as well as for on-the-job employee reference and for use by supervisors in maintaining quality-control over NPC operations.

Considerable work has been done to develop specific procedures and formats for population planning, monitoring and evaluation at national and governorate levels. This built upon initial efforts to develop procedures and formats under UNFPA supported projects, and has resulted in several improved revisions that are currently being tested for further refinement.

EP&A consultants also assisted NPC counterparts in preparing an update of Egypt's current five-year population plan, including a major study to determine the costs of family planning services among the various IA in Egypt.

### 3.4 TRAINING

The initial project training strategy desired by NPC involved continued use of external training procured under contracts with Egyptian universities. During the first Project year, a review and assessment of this training by EP&A consultants indicated that a more cost-effective approach to project supported training could be achieved through the use of in-house training courses specifically designed to meet job requirements utilizing competency-based training methods. The CBT approach would also assist in developing NPC training staff in competency-based skills-oriented training methods and curricula development. NPC staff would also have the opportunity to develop their skills and capabilities in the planning and management of training courses rather than continue to rely upon academic institutions to perform these activities. This approach was also viewed as critical to improving the morale and productivity of NPC training staff. In the third version of the IDP Project Paper, this approach to project training was formally incorporated and has been implemented with great success.

Whereas, the initial academic-oriented training courses had little impact on job performance, experience to date with CBT has shown remarkable improvements in performance. The following courses were designed and conducted by EP&A consultants and the Resident Advisor in close collaboration with NPC training officer counterparts, who have taken an increasingly responsible role in the in-house training program, to the extent that they are now approaching self-sufficiency in the conduct of training courses and in the use of CBT methods:

- Population Dynamics
- Contraceptive Technology Update
- Basic Management

- Advanced Management
- Population Planning Methods
- Population Monitoring and Evaluation Methods

The success of the Project's in-service training program has singularly created a "can do" attitude on the part of NPC training staff. This has served to stimulate positive attitudes among most other NPC staff as well as the belief that the long sought-after goal of creating a viable NPC and a meaningful work environment is possible through the IDP.

#### 4. ISSUES AND DEVELOPMENT WORK REMAINING

The fourth version of the IDP design, dated August 1990, fully describes the NPC development work planned through May 1993, the balance of the current project period. Embodied in the current IDP design are the following issues and work to be done:

##### 4.1 INFORMATION SYSTEM DEVELOPMENT

As work has progressed to develop functioning population planning, monitoring and evaluation systems at NPC/G and NPC/TS levels, weaknesses in the availability, validity and reliability of data have surfaced and now represent a major obstacle to improving the most important functions of NPC at field and headquarters' levels. Information systems research and the design of a cost-effective information system to serve NPC needs is now a very high priority. Major efforts utilizing both Egyptian and foreign technical consultants are planned for 1991 and 1992 to achieve full development of this system.

##### 4.2 SYSTEMS APPLICATIONS AND REFINEMENTS

As standardized policies and procedures manuals are drafted and placed into use during 1991, evaluation of their adequacy will be performed by users and consultants, and improved versions will be produced as deemed appropriate by NPC staff. The manuals will be adapted for use in pre-service and in-service training. The adaptation process, and the actual process of training, will also produce suggestions for improvements which will be incorporated in the manuals with each subsequent revision. The use of standardized manuals throughout the field and central NPC organization will serve as means for attaining a more acceptable even quality of NPC outputs country-wide, including standardized content and format in multi-year and annual population plans and reports, and in efforts to monitor, coordinate and facilitate population programs throughout the nation.

### 4.3 TECHNICAL SKILLS DEVELOPMENT

Much work remains in upgrading the technical skills of NPC/TS and NPC/G personnel. As more complete staffing of NPC occurs, particularly NPC/G offices, basic training courses will have to be offered to these staff followed by more advanced training. Existing staff will need more advanced training in population analysis, planning, monitoring and evaluation. Also, as NPC operating policies and procedures are revised on the basis of experience, workshops will be required to update staff knowledge and skills. Fortunately, the growing in-house capacity to update existing curricula and design new curricula will meet the continuing training needs of NPC staff. NPC trainers have developed a reasonable TOT skills level and can now conduct and evaluate courses without substantial outside technical assistance. Additional training of trainers, assistance with curricula design and in the more sophisticated training methodologies, is anticipated during 1991 and 1992 on a phased down basis.

### 4.4 MANAGEMENT SKILLS DEVELOPMENT

The development of supervisory and managerial skills and capabilities is a longer-term process than technical skills development, as progress depends greatly on attitudinal changes and changes in the management systems infrastructure of NPC that governs changes in supervisory and managerial behavior. Consequently, substantial work will continue in this area through the remaining period of the Project, and probably beyond. As managerial operations manuals are completed and subsequently refined, they will determine management training content.

As the organization develops and evolves, training materials and activities also will have to evolve. The growing in-house capacity to design, conduct and evaluate management training will require only a phased down level of outside technical assistance after initial training programs are completed.

### 4.5 INSTITUTIONALIZATION

To protect the institutional development gains and the financial investment being made through IDP, much work remains to be done to insure that NPC is capable of sustaining anticipated end-of-project viability and effectiveness:

- a. The entire NPC organization, including the NPC/G offices, need to be designated as a permanent GOE organization, with its personnel positions, salaries and allowances given permanent status through action of the GOE Central Agency for Organization and Management.

- b. Most NPC personnel remain in secondment status from other GOE agencies. Their status needs to be either converted to NPC permanent employees or they should be returned to their home agencies and replaced with permanent NPC personnel who would have to be trained.
- c. The salary and allowance levels of NPC "scientific" personnel positions need to be significantly increased in order that appropriately qualified personnel can be attracted to and retained in these positions. Currently, most highly technical jobs are filled on a temporary basis by outside consultants who can be paid at a higher level. This approach, however, does not provide adequate numbers of full-time permanent staff, nor a continuity of their service, since turnover is far too high among consultants.
- d. The relationship of NPC/G offices to Provincial Governor's offices needs to be strengthened to give NPC/G offices greater authority and responsibility for coordinating population plans and programs within each region.
- e. There continues to be a need for the establishment of a permanent Deputy Secretary General position which would function as a full-time general manager of NPC operations, insulating the political appointee position of Secretary General from the day-to-day administrative operations similar to how Under-Secretaries function in a line ministry organizational structure. The proposed Deputy position has been filled from time to time and is currently occupied by a very effective part-time consultant. The job needs to be full-time and given permanent employment status.
- f. The existing IDP central Project office needs to be given permanent status as the office responsible for overseeing NPC/G operations.

#### 4.6 DEVELOPMENT PROJECT PLANNING, MONITORING AND EVALUATION

In past years, the USAID Population Office and its consultants have had to take almost full responsibility for development project planning, design, implementation oversight and evaluation for the population sector of Egypt. These are functions that NPC staff and consultants should be capable of performing in the future for Egypt.

Much work needs to be done to develop these NPC capabilities and such work has not yet seriously begun. The current development of basic capabilities on population program planning, monitoring and evaluation is a pre-requisite to developing capabilities in development project design, implementation and evaluation that must satisfy donor technical and budgetary requirements and guidelines.

## 5. CONCLUSION

EP&A consultants and staff began working with NPC counterparts in mid-1988. At that time there was little interest and motivation in the IDP among NPC staff. Some considered NPC to be a dead organization, even before development was seriously begun. The old Supreme Council and National Family Planning Board, from whence it came, had been abolished. Many good personnel had left and most remaining wanted to leave. Most positions were vacant or filled by temporary seconded staff. There was a general malaise, with essentially no significant work being done.

Through counseling and encouragement of NPC staff by FHI/EP&A consultants, one-on-one working relationships were established and blossomed. NPC staff counterparts who began to show interest became productive, and those that did not were replaced by the NPC Secretary General. By early 1990 a substantial commitment to institutional development had developed among a "critical mass" of NPC staff. During the remainder of 1990 a great amount of development work was achieved. As of December 1990, NPC/TS and NPC/G staff, EP&A consultants and their NPC counterparts are very positive and optimistic that the current development momentum will continue and that NPC, as an institution, will be completely transformed into its expected role as the leadership organization for the population sector in Egypt. Much work remains to be done, but there is now the commitment and momentum needed to do it.

**APPENDIX A.**

**FHI/EP&A SUBCONTRACT**

# FAMILY HEALTH INTERNATIONAL

April 19, 1990

Mr. Ernest Petrich, President  
E. Petrich and Associates, Inc.  
814 Grande Avenue  
Arroyo Grande, CA 93420

REFERENCE: Subcontract 5588: EPA and Associates, Inc.  
Institutional Development Project of the  
National Population Council of Egypt (Revised)

Dear Mr. Petrich:

Enclosed, please find a fully executed copy of the referenced Subcontract. Also, enclosed are the Recipients's Monthly Financial Report forms for your use. The first form has been partially completed for your reference. Please note that the cash advance increase of US \$15,000 was forwarded to you on 2 March 1990.

Please feel free to contact Dr. Karen Hardee-Cleaveland, the Technical Monitor for this project, if you have any questions on the enclosed.

Sincerely,

  
David L. Lynn  
Contracts and Grants Manager

DLL/vaf

cc: Dr. Karen Hardee-Cleaveland, Technical Monitor, FHI

RECEIVED APR 22 1990

FAMILY HEALTH INTERNATIONAL

SUBCONTRACT

TITLE: EPA and Associates, Inc.: Institutional Development Project of  
the National Population Council of Egypt

NUMBER: 5588 (Revised)  
TYPE Cost Reimbursement

TECHNICAL MONITOR

NAME Karen Hardee-Cleaveland  
TITLE Program Coordinator

EFFECTIVE DATE 1 May 1988  
COMPLETION DATE 30 September 1990

SUBCONTRACTOR

NAME E. Petrich and Associates, Inc.  
814 Grande Avenue  
Arroyo Grande, CA 93420

ADDRESS

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

EXECUTED BY: Name Printed or Typed ERNEST E. PETRICH  
Title Printed or Typed PRESIDENT,  
F. PETRICH AND ASSOCIATES, INC.  
Signature *Ernest E. Petrich*

FAMILY HEALTH INTERNATIONAL:  
Name Printed or Typed Robert W. Hughes  
Title Printed or Typed Contracts Administrator  
Signature *Robert W. Hughes*

This Subcontract consists of this cover sheet, a Memorandum of  
Negotiation, a Schedule of 32 pages, and Subcontract Standard  
Provisions.

RECEIVED  
MAR 19 1990

## MEMORANDUM OF NEGOTIATION

### Recipient

E. Petrich and Associates, Inc. (EPA) is a small business technical assistance firm headquartered in Arroyo Grande, California. EPA specializes in public and private sector management development/institutional development in the fields of health, nutrition and population/family planning. EPA's key staff, associates and consultants have extensive experience in over 50 countries on all continents, on behalf of the U.S. Agency for International Development, World Health Organization, World Bank, Regional Development Banks, and other international donor agencies, as well as directly for developing country governments. (Background and qualifications of key personnel are described in Section 1.6 of the Subagreement.) EPA's management specialist services include:

- Pre-Project Institutional Analysis: Assessing managerial resources and capabilities including economic, social, environmental, and administrative considerations.
  
- Operations and Systems Research: Designing and implementing research to assess managerial/institutional problems and capabilities for the purpose of defining feasible management development interventions.
  
- Resource Planning: Developing alternative resource projections, strategies and plans for financing, including revenue generation and

cost recovery; for personnel, including mix and training; and for supplies, equipment and facilities development and maintenance.

- Project Design: Planning development initiatives and project support infrastructure at local, regional and national levels including development strategies, methods and resources.

- Project Management: Designing and installing systems and methods for project implementation planning, implementation supervision, monitoring and reporting.

- Systems Design: Conducting systems research and analyses and producing improved operational policies and procedures for program planning and management, including supervisory and productivity incentive systems, and systems for finance, personnel, information, supply, transportation, and facilities and equipment maintenance.

- Training: Conducting technical and management training needs assessments, designing competency-based training curricula and materials, conducting training for trainers, managers and supervisors, evaluating training, and developing training manuals, training courses, programs and institutions.

- Team Building and Organizational Development (OD): Designing, conducting, and evaluating OD team building exercises and programs to achieve improved cooperation, coordination, and productivity in the workplace.

- Program and Project Evaluation: Designing and installing systems and methods for program and project evaluation, conducting evaluations, and preparing evaluation reports.

- Managing Technical Assistance: Selecting, mobilizing, supervising supporting and evaluating long-term in-country and short-term intermittent management specialists, advisors and consultants.

- Managing Procurement: Preparing specifications, identifying suppliers, obtaining vendors, awarding contracts, and arranging export, shipment, import and delivery.

#### Cost Analysis and Budget

Over the Subcontract duration of three project years (PY) FHI is requested to provide to EPA the funds for the revised budget summarized below.

PY	Original	Revised
PY01, -5/88-4/89	US \$227,661	US \$163,072
PY02, -5/89-4/90	US \$191,682	US \$450,093
PY03, -5/90-9/90	<u>US \$167,271</u>	<u>US \$223,373</u>
TOTALS	US \$586,614	US \$835,553

23

This funding is in support of technical assistance and training activities to support institutional development of the Egyptian National Population Council.

A budget summary can be found on page 15 of this Subcontract Schedule.

The total estimated cost for this project is US \$835,553.

TABLE OF CONTENTS

I. STATEMENT OF WORK . . . . . 1

II. WORK PLAN . . . . . 1

III. TECHNICAL DIRECTIONS. . . . . 1

IV. BUDGET . . . . . .15

V. SPECIAL PROVISIONS . . . . . .20

25

## I. STATEMENT OF WORK AND WORKPLAN

Over the 29 month life of this Subcontract, EPA will provide the technical services of a Senior Development Consultant, a Resident Management Advisor, and other consultant personnel to assist with NPC's research and other related institutional development needs including the capabilities to plan, coordinate and implement population/family planning research, and to utilize the results of research in planning, monitoring and evaluating Egypt's national population/family planning program.

Specifically:

### 1.1 Operations and Systems Research

1.1.1 Design and conduct operations and systems research to assess the strengths and weaknesses of supervision and program management including program planning, monitoring and review, training management and office management, and to prepare and present reports of findings, conclusions and recommendations for review and approval by the NPC.\*

1.1.2 Assist the NPC to prepare review, revise and issue systems manuals which will describe the operational management, planning, monitoring, review and evaluation; management of training and office management. The manuals will be utilized as part of curricula content for training programs and as on-the-job reference materials for managers and supervisors.

\* Includes the central technical secretariat and governorate offices of NPC.

1.1.3 Review and assess the systems research and design work performed by Egyptian technical advisors and consultants, provide technical assistance to them as required (including orientation and training in systems research, analysis and design methodologies), and generally serve as a technical resource for quality control purposes in matters involving systems research, analysis and design.

## 1.2 Training Applications of Operations and Systems Research Results

1.2.1 Assist with designing and conducting training needs assessments to identify and define training specifications for NPC technical staff, supervisors, mid-level and senior managers, and train counterparts in the NPC and locally contracted training institutions in techniques and methods for designing, conducting and evaluating training needs assessments.

1.2.2 Assist with the design of training curricula, including the design and preparation of competency-based training materials and aids, and train counterparts in the NPC and local training institution in curriculum design methods and formats for competency based training in the following areas:

- Leadership in Population/Family Management
  
- Organizational Development/Team Building, for national and governorate level personnel of the NPC and implementing agencies
  
- Basic Population/Family Planning Management Course
  
- Advanced Population/Family Planning Management Seminars
  
- Population Information Systems Course
  
- Monitoring and Evaluation Methods Course

1.2.3 Assist with the training of trainers in the NPC and local training institutions, with emphasis on the use of competency-based training curricula, methods and materials.

1.2.4 Provide technical back-stopping assistance to counterparts in the NPC Egyptian training consultants, and local training institutions, when conducting initial training courses.

1.2.5 Assist with the evaluation of training activities and courses and provide orientation and training to NPC and local training institution staff in training evaluation approaches and methods.

1.2.6 Provide general institutional development technical assistance to the NPC in developing its capacity to plan, coordinate, conduct and evaluate training programs and activities, and to one or more local training institutions in the development, management and evaluation of competency-based training for the population/family planning sector.

### 1.3. U.S. - Based Participant Training

1.3.1 Conduct a brief training needs assessment of a representative sample of potential course participants and, in collaboration with FHI and NPC officials, develop specifications for a US-based participant training course and related study tour.

1.3.2 In collaboration with FHI personnel specializing in contraceptive technology and clinical and bio-medical research, design competency-based curriculum components of the proposed course to cover both personnel and programmatic executive leadership skills in planning, management and evaluation for Egyptian population/family planning programs. Based on the curriculum design, prepare training materials and aids, including formative evaluation materials.

### 1.4. Assistance with Project Design, Implementation, Planning and Monitoring, Including Coordination of Technical Assistance

1.4.1 Assist the NPC/TS, Implementing Agencies (IA's), and USAID

in monitoring implementation of USAID assisted projects, providing assistance in project design and/or redesign as requested to insure the population/family planning projects in Egypt are kept relevant to the needs and priorities of Egypt and USAID.

1.4.2 The Senior Development Consultant will work closely with the FHI Program Coordinator for Egypt, the FHI Director of Field Development and Training, and other FHI staff including research and evaluation staff, to provide for quality control, coordination and continuity of technical assistance to the NPC. It will be the responsibility of the Senior Development Consultant to brief appropriate FHI staff on program goals or accomplishments and the travel schedules of consultants involved in the IDP.

1.4.3 Orient/train NPC/TS staff in project management methods in collaboration with FHI staff.

1.4.4 Assist the IDP Director to prepare and update annual project implementation plans for review and approval of NPC and USAID in collaboration with FHI staff.

1.4.5 Monitor and review performance of foreign and local consultants in collaboration with FHI staff.

1.4.6 Assist the IDP Director with the FHI Program Coordinator on a quarterly basis to review project implementation status and to prepare quarterly project implementation progress reports for

submission to USAID in collaboration with FHI staff.

1.4.7 Attend and serve as a technical resource person with the FHI Program Coordinator during quarterly project review meetings to be held jointly with NPC, UNFPA and USAID representatives for the purpose of reviewing quarterly project implementation progress reports and guiding future project implementation in collaboration with FHI staff.

(See Attachment #1 for detailed Job Description of Senior Development Consultant and Attachment #2 for detailed Job Description of Resident Management Advisor).

#### 1.5 Estimated Technical Assistance Inputs

Activity	PY01	PY02	PY03	Total
1.5.1 Sr. Mgt. Consultant	5	7	2	14
1.5.2 Resident Mgt. Advisor		4	8	12
1.5.3 Systems Research/Design	3	4	2	9
1.5.4 Training	2	4	3	9
1.5.5 Financial/Research	-	5	-	5
	--	--	--	--
	10	24	15	49

#### 1.6 Key Personnel

EPA will provide technical inputs required to carry out the work of this proposed contract by mobilizing and supporting a long-term Resident Management advisor and selected staff and consultant specialists who will go to Egypt on an intermittent basis over the life of the project, thus ensuring continuity of perspective and shorter briefing and preparation times for staff and consultants. The EPA professionals who are available to serve as key personnel

illustrate the levels of capability and experience which will be provided to FHI under this contract. No changes in the following key personnel can be made without the express written consent of the FHI Technical Monitor.

1.6.1 Ernest E. Petrich is President of EPA and is a widely recognized specialist in population/family planning project design and evaluation and in systems research, analysis, design and training. He is trained in public administration, management, public health and family planning, and has held executive positions in government and international assistance agencies. Over the past 20 years, he has served as long-term advisor and short-term consultant to numerous USAID-funded health and family planning projects in Asia, Africa, Latin America and the Near East, including several recent project design assignments for USAID/Egypt. Mr. Petrich will serve as the Senior Management Development Consultant and will supervise and direct the services provided by EPA consultants.

1.6.2. David R. Alt, M.P.H., is a specialist in family planning and administration who has provided technical advisory services and short-term assistance for systems development in Africa, the Caribbean and Asia. Mr. Alt's technical strengths lie in systems research, analysis and planning for effective family planning manpower development and deployment. This experience involves personnel systems analysis including manpower inventory analysis, training needs assessments, organizational development,

team-building, curriculum planning, and the design and execution of competency-based training.

1.6.3 Rose M. Schneider, M.P.H., with over 15 years of development technical assistance experience in Asia, Africa and Latin America, specializes in key aspects of institutional development for family planning services including systems analysis and design of supervision and management systems at national, regional and local levels of national programs, and related competency-based training, including the development of institutionalized and sustainable in-service training and continuing education systems.

1.6.4 William M. Albright, M.A., is a development specialist with skills in systems analysis and design, planning and conduct of group process organizational development (OD) type workshops, the writing of policy and procedure manuals, the design, conduct and evaluation of competency-based training, and in project management methods including implementation planning, monitoring, reporting and evaluating.

1.6.5 Elizabeth Heilman, Ph.D., has over fifteen years of international experience in private and public sector development. She is a specialist in financial planning and management for population/family planning services, including operations research, cost-effectiveness studies and the design and implementation of productivity incentive schemes. She is fully

fluent in Arabic and highly experienced in the Near East, including Egypt.

1.6.6 Waleed Alkhateeb, Dr. PH, has over 20 years experience in international development work beginning as a health educator and competency-based training specialist. In recent years, he has developed special skills in systems research and design for institutional development. He also has had many years experience in serving as team leader and in training others about project management methods to support health and family planning development projects.

1.6.7 Beth Beckner, Ed.D., is widely experienced in all aspects of training for health and feasibility planning programs having formally served as training director of AID-funded training projects, including INTRAH PACI. She is a specialist in developing a full range of training capabilities by her clients, including training needs assessment methods and skills, design of curricula and training aids to achieve competency-based training outcomes, training of trainers on competency-based methods, and in evaluating training and training programs.

The technical expertise of the above short-term specialists will be made available to FHI and the NPC by EPA under terms consistent with USAID regulations and the needs of the IDP. Other consultants, as needed, will be made available by EPA on requested and prior-approval basis.

## 1.7 Contracts Administration

### 1.7.1 Contract Management

Management of all activities under this contract will be the responsibility of Ernest E. Petrich, President of EPA, who will function as EPA's Project Director and as the Senior Management Development Consultant on this project. Mr. Petrich will carry out the technical services described above, or will directly supervise the selection, recruitment and preparation of other consultants employed by EPA to provide these services, and will supervise and evaluate their activities in consultation with FHI, USAID and the NPC. He will coordinate technical planning and management with FHI and, as required, with USAID/Washington and other US-based organizations. He will take sole responsibility for keeping key FHI staff informed of this project and ensuring that relevant FHI staff are aware of and invited to participate in major policy/management meetings and specific training sessions in Egypt. He will provide technical assistance in selected areas. He will also be responsible for ensuring the quality and timely submission of all reports and other technical materials generated under this contract.

To reduce logistical burdens on all parties, EPA will closely collaborate with FHI, the USAID/Egypt Population Office, and the NPC in developing annual and updated semi-annual schedules for

technical assistance visits to Egypt by staff and consultants, to ensure that such visits are scheduled to conform to relevant project implementation activities while also recognizing the availability of staff and consultants.

Contract administration and logistical support for technical activities will be the responsibility of the EPA Vice-President for Administration and/or her staff who will provide for resident advisor and consultant mobilization, including complete travel planning, securing all required technical and travel approvals, assembling and providing consultant briefing materials, estimating costs of technical assistance trips, and preparing travel advances and reconciliations.

Consultants will be employed under this contract in accordance with sound business management standards maintained by EPA and within USAID regulations and FHI policies governing consultant employment and consultant fee rates. Any changes in previously selected consultant staff will be made only with the express written permission of FHI. DBA and SOS insurance will be provided by EPA for staff and consultants on long-term and temporary duty in Egypt. All international travel will be planned and executed in accordance with USAID regulations and FHI policies.

#### 1.7.2 Trip Reports

At the end of every consultant assignment, each EPA consultant and

staff member providing a short-term technical assistance under this contract will prepare a written trip report for submission through EPA to FHI. After final revisions are made, EPA's home office will provide copies of all trip reports to FHI and through FHI to USAID, in accordance with standard recipient reporting requirements.

#### 1.7.3 Other Technical Materials and Reports

All technical materials generated under this contract will be submitted to FHI, USAID and the NPC for review and approval according to prescribed schedules.

#### 1.7.4 Financial Reports

Financial reports will be submitted to FHI on a monthly basis, following USAID regulations and FHI administrative procedures, including the prescribed format and required supplemental materials.

### III. TECHNICAL DIRECTIONS

The FHI Technical Monitor for the Subcontract will be Dr. Karen Hardee-Cleaveland. The Technical Monitor is responsible for:

1. Monitoring the Subcontractor's technical progress,
  - including surveillance assessment of performance, and recommending to the FHI Contracts Administrator changes in scope of work, Subcontract schedules and/or specifications to meet changes in requirements;
2. Interpreting scope of work;
3. Performing technical evaluation as required;
4. Performing technical inspections and acceptances required by this Subcontract; and
5. Assisting the Subcontractor in the resolution of technical problems encountered during performance.
6. In cooperation with the senior management consultant, reviewing and approving all travel plans under the Subcontract.

7. In cooperation with the senior management consultant, evaluating the performance of foreign and Egyptian consultants working under the Subcontract;
8. Giving final approval of all foreign consultants assigned to perform work under this Subcontract.

The FHI Contracts Administrator is responsible for directing or negotiating any changes in the terms, conditions or amounts cited in the Subcontract.

For the Subcontractor to accept any inputs from the Technical Monitor they must:

1. Be consistent with the description of work set forth in this Subcontract;
2. Not constitute new assignment of work or change the expressed terms, conditions or specifications incorporated into this Subcontract;
3. Not constitute a basis for an extension to the period of performance or Subcontract delivery schedule; and
4. Not constitute a basis for any increase in the Subcontract fee and or cost.

IV. EPA BUDGET (FBI SUB-AGREEMENT)

BUDGET CATEGORY	YEAR 1	YEAR 2		YEAR 3	GRAND TOTAL
	5/88 - 4/89 (ACTUAL)	5/89 - 12/89 (EST)	1/90 - 4/90 (EST)	5/90 - 9/90 (EST)	
1. SALARY	37,519	54,284	65,102	77,863	234,768
2. FRINGE BENEFITS	14,591	8,359	15,698	20,305	58,953
3. CONSULTANT FEES	27,258	21,882	26,756	15,600	91,496
4. TRAVEL & ASSOCIATED	36,035	45,507	31,570	31,246	164,358
5. OTHER DIRECT COSTS					
- DBA/SOS INSURANCE	1,426	640	850	1,150	4,066
- SECRETARIAL SERVS	4,971	10,236	6,660	8,200	30,067
- COMMODITIES & EQUIP.	127	0.00	3,400	0	3,527
- COMM. & SUPPLIES	2,033	4,311	1,500	2,250	10,094
- PHOTOCOPY	286	1,723	1,000	1,000	4,009
- LOGISTICAL SUPPORT/ RES. ADVISOR	0.00	0.00	17,167	7,900	25,067
- CAIRO OFFICE SPACE		1,907	4,000	4,300	10,207
6. TOTAL DIRECT COSTS	124,246	148,849	193,703	169,814	636,612
7. GENERAL ADMINISTRATION OVERHEAD @ 25%	31,061	37,213	48,426	42,453	159,153
8. BUSINESS FEE @ 5%	7,765	9,303	12,106	10,614	39,788
TOTAL COSTS:	163,072	195,365	254,235	222,881	835,553

BUDGET CATEGORY	12/89 (ACT)	JAN (EST)	FEB (EST)	MAR (EST)	APR (EST)	TOTAL THRU 6/90	MAY (EST)	JUN (EST)	JUL (EST)	AUG (EST)	SEP (EST)	TOTAL THRU 9/90
<b>1. SALARY</b>	<b>91,803</b>					<b>91,803</b>						<b>91,803</b>
SR. CONSULTANT - PETRICH												
Workdays		5	8	5	10		5	10	5	5	10	
Daily Rate		290	290	290	290		290	290	290	290	290	
Total Salary		1,450	2,320	1,450	2,900	8,120	1,450	2,900	1,450	1,450	2,900	18,270
RES. MGT CONSULT - ALKHATEEB												
Base Salary		5,768	5,768	5,768	5,768		5,768	5,768	5,768	5,768	5,768	
Post Diff @ 15%		865	865	865	865		865	865	865	865	865	
Total Salary		6,633	6,633	6,633	6,633	26,532	6,633	6,633	6,633	6,633	6,633	59,697
FIN. CONSULTANT - HEILMAN												
Workdays		18	18	18	18		18	18	18	18	18	
Daily Rate		257	257	257	270		270	270	270	270	270	
Total Salary		4,626	4,626	4,626	4,860	18,738	4,860	4,860	4,860	4,860	4,860	43,038
MGT. SYS CONSULT - ALBRIGHT												
Workdays		18	10	10	10		10	6	6	10	10	
Daily Rate		244	244	244	244		244	244	244	244	244	
Total Salary		4,392	2,440	2,440	2,440	11,712	2,440	1,464	1,464	2,440	2,440	21,960
<b>TOTAL SALARY</b>		<b>17,101</b>	<b>16,019</b>	<b>15,149</b>	<b>16,833</b>	<b>156,905</b>	<b>15,383</b>	<b>15,857</b>	<b>14,407</b>	<b>15,383</b>	<b>16,833</b>	<b>234,768</b>
<b>2. FRINGE BENEFITS</b>	<b>22,950</b>					<b>22,950</b>						<b>22,950</b>
PETRICH @ 28%		406	650	406	812	2,274	406	812	406	406	812	5,116
ALKHATEEB @ 22% - 6/90, 27%		1,459	1,459	1,459	1,459	5,836	1,459	1,459	1,791	1,791	1,791	14,127
HEILMAN @ 28%		1,295	1,295	1,295	1,361	5,246	1,361	1,361	1,361	1,361	1,361	12,051
ALBRIGHT @ 20% - 6/90, 25%		878	488	488	488	2,342	488	293	366	610	610	4,709
<b>TOTAL BENEFITS</b>		<b>4,038</b>	<b>3,892</b>	<b>3,648</b>	<b>4,120</b>	<b>38,688</b>	<b>3,714</b>	<b>3,925</b>	<b>3,924</b>	<b>4,168</b>	<b>4,574</b>	<b>58,953</b>
<b>3. CONSULTANT FEES</b>	<b>49,140</b>					<b>49,140</b>						<b>49,140</b>
TRAINING SPEC - BECKNER												
Workdays		6	10	24	6		6	24	6	6	24	
Daily Rate		180	180	180	180		180	180	180	180	180	
Total Fee		1,080	1,800	4,320	1,080	8,280	1,080	4,320	1,080	1,080	4,320	20,160
FINANCIAL SPEC - ESSELY												
Workdays		12	12	12	12		12	12	12	12	12	
Daily Rate		62	62	62	62		62	62	62	62	62	
Total Fee		744	744	744	744	2,976	744	744	744	744	744	6,696
OTHER ACCRUED - ALBRIGHT, ALKHATEEB, MURRELL		15,500	0	0	0	15,500	0	0	0	0	0	15,500
<b>TOTAL FEES</b>		<b>17,324</b>	<b>2,544</b>	<b>5,064</b>	<b>1,824</b>	<b>75,896</b>	<b>1,824</b>	<b>5,064</b>	<b>1,824</b>	<b>1,824</b>	<b>5,064</b>	<b>91,496</b>

16

44

BUDGET CATEGORY	12/89 (ACT)	JAN (EST)	FEB (EST)	MAR (EST)	APR (EST)	TOTAL THRU 4/90	MAY (EST)	JUN (EST)	JUL (EST)	AUG (EST)	SEP (EST)	TOTAL THRU 9/90
<b>TRAVEL &amp; ASSOCIATED</b>	<b>81,542</b>					<b>81,542</b>						<b>81,542</b>
NO. OF TRIPS		3	1.5	1.5	1.5		1	2	1	1	2.5	
AVG. COST PER TRIP		3,000	3,000	3,000	3,000		3,000	3,000	3,000	3,000	3,000	
TOTAL AIRFARE		9,000	4,500	4,500	4,500	22,500	3,000	3,000	3,000	3,000	3,000	37,500
PER DIEM DAYS		110	70	50	30		30	40	18	18	40	
DAILY RATE/CAIRO		101	101	101	101		101	101	101	101	101	
TOTAL PER DIEM		11,110	7,070	6,060	3,030	27,270	3,030	4,040	1,818	1,818	4,040	42,016
OTHER TRAVEL		900	300	300	300	1,800	200	400	200	200	500	3,300
<b>TOTAL TRAVEL</b>		<b>21,010</b>	<b>11,870</b>	<b>10,860</b>	<b>7,830</b>	<b>133,112</b>	<b>6,230</b>	<b>7,440</b>	<b>5,018</b>	<b>5,018</b>	<b>7,540</b>	<b>164,358</b>
<b>OTHER DIRECT COSTS</b>	<b>27,660</b>					<b>27,660</b>						<b>27,660</b>
- DBA/SOS INSURANCE		400	150	150	150	850	350	250	150	150	250	2,000
- SECRETARIAL SVCS												
Home Office Salary		800	800	800	800	3,200	800	800	800	800	800	7,200
Home Office Benefits @ 30%		240	240	240	240	960	240	240	240	240	240	2,160
Cairo Sec'y Service		700	600	600	600	2,500	600	600	600	600	600	5,500
- EQUIPMENT		400	3,000 <sup>①</sup>	0	0	3,400	0	0	0	0	0	3,400
- COMM. & SUPPLIES		150	450	450	450	1,500	450	450	450	450	450	3,750
- PHOTOCOPY		400	200	200	200	1,000	200	200	200	200	200	2,000
- LOGISTICAL SUPPORT/LTA												
Housing & Utilities		9,867				9,867			7,400			17,267 <sup>②</sup>
F&E Storage & Movement		7,000	100	100	100	7,300	100	100	100	100	100	7,800
- CAIRO OFFICE SPACE		4,000	0	0	0	4,000	0	4,300	0	0	0	8,300
<b>TOTAL OTHER DIRECT COSTS</b>		<b>23,957</b>	<b>5,540</b>	<b>2,540</b>	<b>2,540</b>	<b>62,237</b>	<b>2,740</b>	<b>6,940</b>	<b>9,940</b>	<b>2,540</b>	<b>2,640</b>	<b>87,037</b>
<b>TOTAL DIRECT COSTS</b>		<b>83,430</b>	<b>39,865</b>	<b>37,261</b>	<b>33,147</b>	<b>466,798</b>	<b>29,891</b>	<b>39,226</b>	<b>35,213</b>	<b>28,933</b>	<b>36,651</b>	<b>636,612</b>

① Microcomputer and printer for Cairo office.

② Includes 12 month rent plus 2 months security deposit, refundable upon successful completion of lease.

Handwritten initials or mark.

**Payment**

Under the original Subcontract between EPA and Family Health International (FHI), cash advances totaling \$50,000 were sent to EPA. These funds were deposited in a special bank account to be used only for the handling of advances, reimbursements and expenditures connected with this Subcontract. Upon execution of this revised Subagreement, FHI will advance an additional \$15,000, thereby making the advance equal to \$65,000. These funds must be deposited in a similar manner. The name in which the account is operated, the name of the bank, the account number and the name and title of the person(s) authorized to write checks on the account has been entered in the space provided below. This information constitutes a part of this Subcontract. The cash advance may only be used to pay expenses authorized by this Subcontract.

Make checks/transfers payable to:

E. Petrich and Associates, Inc.

Name and Address of Bank:

 ~~Mid State Bank~~  
~~1026 Grande Avenue~~  
~~Arroyo Grande, CA 93420~~

Security Pacific National Bank  
1255 Grand Avenue  
Arroyo Grande, CA 93420

Bank Account Number:

~~01066293-01134~~

122000043:700-100424

Name and Title of Person(s) authorized to write checks on the above bank account:

Ernest E. Petrich, II, President

E. Helene Petrich, Corporate Secy.

Karen Martin, Vice-President, Administration

Method by which funds should be transmitted (checks, telegraphic transfers, etc.):

Checks

FHI requires submission of monthly financial reports. FHI will reimburse the Subcontractor for expenditures reported until such time that the remaining amount of the cash advance will cover expenditures expected to be incurred. The cash advance will be liquidated in covering subsequent expenditures. In no event will the total amount transmitted via cash advances and reimbursements exceed US \$835,553 and may be less if expenditures for work authorized by the Subcontract are less than the amount budgeted. In no instance shall the Subcontractor be reimbursed for an amount that is in excess of the amount budgeted for that expenditure unless prior approval has been obtained from the FHI Contracts Administrator.

Upon termination of this Subcontract the Subcontractor will return any unrecovered cash advances to FHI.

The Subcontractor shall prepare and submit to FHI the Contracts Administrator a Semi-annual substantive report covering the status of the work under the Subcontract, indicating progress made with respect thereto, and setting forth plans for the ensuing quarter, including recommendations covering the current needs in the field of activity covered under the terms of this Subcontract.

At the conclusion of the work hereunder, the Subcontractor shall prepare and submit to the FHI Contracts Administrator a final report that summarizes the accomplishments of the assignment, methods of work used, recommendations regarding unfinished work and/or program continuation and recommendations covering the current needs in the fields of activity covered under the terms of this Subcontract. The final report shall be submitted within forty-five (45) days after completion of the work hereunder unless this period is extended in writing by the FHI Contracts Administrator.

#### V. SPECIAL PROVISIONS

1. Of the awarded budget, \$835,553 is made available to the Subcontractor to cover activities through 30 September 1990.

It is FHI's intent to make funds available for this project at budgeted U.S. dollar amounts.

2. Although FHI understands that the Principal Investigator for this study will be Ernest Petrich, this Subcontract is between FHI and Subcontractor. All responsibility for patient care, as well as any accrued liability, is solely that of the Subcontractor.
3. The project design will be followed exactly, unless prior written approval for deviation is received from the Technical Monitor.
4. The welfare of the patient the preeminent project consideration, and all reasonable steps will be taken by the Subcontractor to protect patient/participant welfare. This will include review of the project by FHI staff, and the Institutional Review Boards from the Subcontractor's parent organization and from FHI. In addition, the project may be reviewed by consultants selected by FHI.
5. THE Subcontractor WILL REPORT IMMEDIATELY TO FHI, via telephone, telex or cable, any serious problems encountered during the project, including major adverse reaction to drugs, devices or procedures. This report will be followed by a completed FHI Adverse Experience Report Form.
6. No participant in the project will be coerced or enticed to accept any fertility regulation drugs, devices or procedures.

7. All participants including those who may be used as controls, will be fully informed of the drugs, devices and procedures used during the investigation. Where such drugs, devices and procedures are not a part of generally accepted medical practices, consent forms, in the patient's native language, that contain information supplied by FHI will be completed by the Subcontractor and signed by the patient. Consent forms will be retained by the Subcontractor for at least three years after completion of the project.
8. The Code of Ethics and all legal and other requirements applicable to the project in the country, region and parent organization of the Subcontractor will be followed.
9. Funds received for this project are not to be used for the following abortion-related activities: a) procurement or distribution of equipment, b) special fees or incentives, c) payment for the performance of abortions, d) information, training or education programs to promote abortions, e) lobbying, or f) biomedical research relating to methods or the performance of abortions or involuntary sterilizations as a means of family planning.
10. In cases when staff and consultant trips to Egypt involve work and time chargeable to other projects as well as this project, work time and salaries or fees and per diem should be chargeable directly to the appropriate project. With respect to the cost of airfare, the amount shall be in the same proportion as is the proportion of work performed on this project during this trip. Only local travel costs directly

related to this project will be chargeable to this project.

EPA shall follow FHI rules and procedures in effect at the date of travel as provided in writing to EPA by FHI. EPA will provide FHI with a six month travel plan in June and December. Once this plan is approved by the appropriate mission and by FHI, travel arrangements can proceed according to standard procedures. Any revision to this plan must be submitted by EPA to FHI in advance of travel.

11. The general and administrative overhead cost rate is estimated and provisional, subject to formal audit and adjustment. The overhead cost rate, whether estimated, provisional or actual, shall not change the monetary ceiling of \$836,538 for this Subcontract.
  
12. The term "Subject Data" as used herein includes manuals, workshop materials, training programs, writings, sound recordings, pictorial reproductions, drawings or other graphical representations, and works of any similar nature (whether or not copyrighted) that are developed under this Subcontract. The term does not include financial reports, cost analyses and other information incidental to Subcontract administration.

ATTACHMENT #1

Job Description: Senior Development Consultant

The Senior Development Consultant's overall responsibility is to provide continuing technical assistance to the NPC/GOE Implementing Agencies (IA's) and to USAID on an intermittent basis through periodic visits to Egypt, for the purpose of assisting in the following areas:

1. Project Design, Implementation Planning, Monitoring, Report Preparation and Reviews

1.1 Your request of IA's, IYPC and USAID design and/or re-design USAID-funded Population/Family Planning Projects to insure continued relevance to the needs and priorities of Egypt and USAID.

1.2 Work closely with the FHI Director of Field Development and Training, the FHI Program Coordinator for Egypt, and other FHI staff including research and evaluation staff, to provide for quality control, coordination and continuity of technical assistance to the NPC and IA's in Egypt.

1.3 Orient/train NPC and IA staff in project management methods.

1.4 Assist the IDP Director and the Resident Management Advisor in the preparation of annual project implementation plans for review and approval by NPC and USAID.

1.5 Monitor and review performance of foreign and local advisors and consultants.

1.6 Assist the IDP Director in the review of the project implementation status and the preparation also of quarterly project implementation progress reports for submission to USAID.

1.7 Attend and serve as a technical resource person during quarterly project review meetings to be held jointly with NPC, UNFPA and USAID representatives for the purpose of reviewing quarterly project implementation progress reports and guiding future project implementation in collaboration with FHI.

2. Mobilize, Coordinate and Supervise Other Organizations/Systems Research Consultants and Directly Assist with Systems/Operations Research and Systems Design

2.1 Design and conduct operations and systems research to assess the strengths and weaknesses of supervision and program management including program planning, monitoring, review, and evaluation, training management and office management, and to prepare and present reports of findings, conclusions and recommendations for review and approval by the NPC.

2.2 Assist the NPC to prepare, review, revise and issue systems manuals which will describe the operational policies, procedures

and formats for supervision: program management, planning monitoring, review, and evaluation; management of training and office management. The manuals will be utilized as part of the curricula for training and as on-the-job reference materials for managers and supervisors.

2.3 Review and assess the operations and systems research and design work performed by Egyptian and foreign technical advisors and consultants, provide technical assistance to them as required (including orientation and training in operations and systems research, analysis and design methodologies), and generally serve as a technical resource for quality control purposes in matters involving operations and systems research.

3. Mobilize, Coordinate and Supervise Other Training Consultants, and Directly Assist with Development of Training

3.1 Assist with designing and conducting training needs assessments to identify and define training specifications for supervisors, mid-level and senior managers, and train counterparts in the NPC and locally contracted training institution in techniques and methods for designing, conducting and evaluating training needs assessments.

3.2 Assist with the design of training curricula, including the design and preparation of competency-based training materials and aids, and train counterparts in the NPC and local training

institution in curriculum design methods and formats for competency-based training.

3.3 Assist with the training of trainers in the NPC/TS and local training institutions, with emphasis on the use of competency-based training curricula, methods and materials.

3.4 Provide technical back-stopping assistance to counterparts in the NPC and local training institutions when conducting initial training courses.

3.5 Assist with the evaluation of training activities and courses and provide orientation and training to NPC and local training institution staff in training evaluation approaches and methods.

3.6 Provide technical assistance to the NPC in general institutional development, including the strengthening of the capacity to plan, coordinate, conduct and evaluate training programs and activities.

4. Design U.S.-Based Executive Leadership Course

4.1 Conduct a brief training needs assessment of a representative sample of potential course participants and, in collaboration with FHI and NPC officials, develop specifications for a U.S.-based participant training course and related study tour.

4.2 In collaboration with FHI personnel specializing in contraceptive technology and clinical and biomedical research, design competency-based curriculum components of the proposed course to cover personal and program executive leadership skills in planning, management and evaluation of Egyptian population/family planning programs. Based on the curriculum design, prepare training materials and aids, including formative evaluation materials.

4.3 In collaboration with FHI, plan, conduct, and evaluate Executive Leadership training courses and related study tours as requested by USAID and/or NPC.

ATTACHMENT #2

Resident Management Advisor Job Description

Introduction:

The Long-Term Resident Management Advisor will serve as an immediate assistant to the IDP Director while working in close collaboration with the Egyptian Senior Management Consultant, to provide overall professional management consulting services to the IDP. The IDP Director, the Egyptian Senior Management Consultant and the Resident Management Advisor will essentially form a three-person management team to oversee and to facilitate IDP implementation. Specifically, the Resident Management Advisor will:

1. Assist with general IDP implementation activities:
  - NPC/G institutional needs assessment activities and the preparation of IDP implementation plans and budgets in collaboration with counterparts at central project office and NPC/G staff.
  - Monitoring and evaluation of IDP implementation activities and the development of recommendations for remedial actions as needed to address implementation deficiencies, including the formulation of new or improved project management procedures.

- Encourage and sustain development momentum, stimulating questions and decisions, particularly about sequencing and timeliness of tasks, and teamwork.
  
  - Serve as a role model and on-the-job counselor and trainer in transferring project management knowledge and skills to NPC staff.
  
  - Prepare draft scopes of work and work activity schedules for Egyptian and foreign consultants.
  
  - Coordinate the schedules, arrivals and departures of short-term consultants to insure availability of counter-parties and appropriate logistical support.
  
  - Provide liaison and follow-up services for the IDP Director and the Central Project Office with USAID and with NPC/G offices as requested.
  
  - Prepare special IDP reports as requested by the IDP Director.
2. Assist with the IDP institutional and systems design and implementation activities:
- Conduct systems and other management analysis activities at the request of IDP Director and prepare reports as needed.

- Assist with the design and implementation of new and revised operating procedures as follow-on activities to the Team Misr Study, and other special surveys or studies that may be conducted.
  
  - Help coordinate and oversee the conduct of systems analysis and design (or redesign) activities for NPC/G office management, information management, personnel management, population planning, monitoring, coordinating, and evaluation systems for NPC/G offices.
  
  - Assist with organizing and conducting group process reviews of new and/or revised systems documentation materials and revision and refinement of these materials resulting from group process reviews.
  
  - Assist with the preparation, review, revision, publication, distribution and use of systems procedures manuals and aides.
  
  - Provide technical assistance in population planning and coordination to NPC/G offices.
  
  - Generally assist the IDP Director and the Egyptian Senior Management Consultant in systems design and implementation activities.
3. Assist with the development and evaluation of management training activities:

- Assist with planning and scheduling training activities, including the use of Project staff and consultants to perform the activities.
  - Facilitate the conduct of effective training needs assessments.
  - Help design competency-based management training curricula and training materials.
  - Support the evaluation of management training courses, and activities, including on-the-job performance evaluation of trainees and the preparation of evaluation reports on overall impact of management training and remedial measures when needed.
  - Help in coordinating and implementing on-the-job training activities in follow-up to group team building and other group training activities.
4. Assist with other general and specific management development tasks, as needed to facilitate IDP implementation, monitoring, reporting and evaluation, as requested by the IDP Director.

N.B. Because of the NPC/G focus of IDP development activities, it is anticipated that at least 50% of the Resident Management Advisor's time will be spent working at NPC/G offices.

**APPENDIX B.**

**EP&A TECHNICAL ASSISTANCE LEVEL OF EFFORT**

EP&A TECHNICAL ASSISTANCE LEVEL OF EFFORT \*  
(July, 1988 - December, 1990)

APPENDIX B

NAME	1988			1989								
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
Albright, William Mgt. System Consul.												
Alkhateeb, Waleed Resident Mgt. Consul.												
Alt, David Training Consultant	7	27	2									
Beckner, Beth Training Consultant												
El-Khazen, Doris Mgt. Consultant				4.5								
Heilman, Elizabeth Fin. Research Consul.												
Marsh, Noel Management Consultant												
Martinkosky, Margaret Financial Mgt. Consul.												
Murrell, Kenneth Mgt. Devel. Consul.												
Ober, Ellen Mgt. Sys. Consul.	14	14		8	18.5	17.5	20					
Petrich, Ernest Senior Consultant	9	11.2	6.8	13	4.5	1.5	2.5	2	8	18	14.9	17.5
Rittman, Joseph Mgt. Sys. Consul.										5		
Schneider, Rose Mgt. Training Consul.				6	26	8						

\* In Workdays

59

**EP&A TECHNICAL ASSISTANCE LEVEL OF EFFORT \***  
**(July, 1988 - December, 1990)**

**APPENDIX B**

NAME	1989						1990					
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
Albright, William Mgt. System Consul.		20	21				22	16	22	8		3
Alkhateeb, Waleed Resident Mgt. Consul.				4	26	25	23	20	21	22	23	16
Alt, David Training Consultant												
Beckner, Beth Training Consultant					8	16		8	20	2	17.5	
El-Khazen, Doris Mgt. Consultant												
Heilman, Elizabeth Fin. Research Consul.	14.5	13.8	15.4	11.2	17.8	17	19	15.2	22	16.8	18.5	16.8
Marsh, Noel Management Consultant												
Martinkosky, Margaret Financial Mgt. Consul.												
Murrell, Kenneth Mgt. Devel. Consul.					11	17						
Ober, Ellen Mgt. Sys. Consul.												
Petrich, Ernest Senior Consultant	15.9	14.9	15.2	6.9	9.8	2	3.6	12.5	10.1	11.2	5.9	14.5
Rittman, Joseph Mgt. Sys. Consul.												
Schneider, Rose Mgt. Training Consul.												

\* In Workdays

**EP&A TECHNICAL ASSISTANCE LEVEL OF EFFORT \***  
 (July, 1988 - December, 1990)

**APPENDIX B**

NAME	1990	AUG	SEP	OCT	NOV	DEC	TOTALS
	JUL						
Albright, William Mgt. System Consul.	7	23	8				150
Alkhateeb, Waleed Resident Mgt. Consul.	15	23	20	23	22	21	304
Alt, David Training Consultant							36
Beckner, Beth Training Consultant	22	22.5	20	10	1		147
El-Khazen, Doris Mgt. Consultant							4.5
Heilman, Elizabeth Fin. Research Consul.	7.2		10.4	14.4	17	17	264
Marsh, Noel Management Consultant			1	13	18		32
Martinkosky, Margaret Financial Mgt. Consul.	22	14.9	17.5	21.4			75.8
Murrell, Kenneth Mgt. Devel. Consul.							28
Ober, Ellen Mgt. Sys. Consul.							92
Petrich, Ernest Senior Consultant	21	23	16.3	10		.8	323.5
Rittman, Joseph Mgt. Sys. Consul.							5
Schneider, Rose Mgt. Training Consul.							40

\* In Workdays

16

E. PETRICH AND ASSOCIATES, INC.

APPENDIX C.

EP&A FINANCIAL REPORT-BUDGET VERSUS ACTUAL EXPENDITURES

Appendix C

EP6A FINANCIAL REPORT - BUDGET VERSUS ACTUAL EXPENDITURES  
 (Sub-Contract No. 5588)  
 for period May 1988 thru December 1990

EXPENSE CATEGORY	APPROVED AMOUNT BUDGETED	ACTUAL AMOUNT EXPENDED	DIFFERENCE
Salaries & Benefits	397,809.00	392,629.41	<5,179.59>
Consultant Fees	86,006.00	86,005.67	<.33>
General Administration	202,912.00	202,926.30	14.30
Office Rent	9,074.00	9,074.33	.33
Secretarial Services	41,323.00	42,718.26	1,395.26
Commodities	9,618.00	9,618.08	.08
Travel & Associated	191,246.00	191,770.97	524.97
Communications & Supplies	20,287.00	22,747.56	2,460.56
Photocopy	6,547.00	7,077.41	530.41
LTA Logistics	27,786.00	28,345.42	559.42
DBA/SOS Insurance	7,315.00	7,003.57	<311.43>
Business Fee	49,996.00	49,995.85	<.15>
TOTAL	1,049,919.00	1,049,912.80	<6.20>

**APPENDIX D.**

**SUMMARY OF EPA CONSULTING TRIPS**

62

**SUMMARY OF CONSULTANT TRIPS**  
(July, 1988 - December, 1990)

Appendix D

<u>Consultant</u>	<u>Trip Dates</u>	<u>In-Country Workdays</u>	<u>Summary of Scope of Work</u>
Albright William	8/ 8/89 - 9/17/89	35	Assist the IDP director in the development of an IDP Implementation Plan and corresponding budget including all key activities covering a sixteen month period (through 1990). Begin Development of the Central IDP office operations manuals.
Albright, William	1/ 7/90 - 2/ 1/90 & 3/ 5/90 - 4/ 4/90	22  27	Assist in developing a proposal for a Population Information System Sub-Project for the NPC which would gather, process, distribute, and store essential information required by NPC/TS and NPC/G offices to perform planning, coordination, monitoring, and evaluation functions.
Albright, William	8/ 1/90 - 8/29/90	25	Assist the IDP Director by conducting a needs assessment pertaining to the proposed development of an Operations Manual for the NPC/Governorate Offices. Analyze findings, draw conclusions, and present recommendations regarding development strategy for the planned NPC/Governorate operations manual.
Alkhateeb, Waleed	11/ 4/89 - 12/ 6/89	32	Initial visit, Resident Management Advisor to the NPC/IDP.
Alt, David	7/24/88 - 9/ 2/88	36	Assist in up-grading the function of the NPC/TS training unit and training specialists of NPC/G offices.

**SUMMARY OF CONSULTANT TRIPS**  
(July, 1988 - December, 1990)

<u>Consultant</u>	<u>Trip Dates</u>	<u>In-Country Workdays</u>	<u>Summary of Scope of Work</u>
Beckner, Beth	11/22/89 - 12/19/89	24	Assess NPC central and governorate level training needs. Begin curriculum design for projected NPC/IDP workshops.
Beckner, Beth	2/21/90 - 3/23/90	27	Assist with conducting contraceptive technology and management planning workshops; plan future workshop and training schedules and technical assistance requirements.
Beckner, Beth	4/30/90 - 5/18/90	17	Conduct Workplan Development Workshop for NPC governorate directors and planning specialists; design and conduct workshop on Population Plan Development; plan two workshops for July.
Beckner, Beth	7/ 5/90 - 7/24/90	18	Conduct two scheduled workshops: Contraceptive Technology Review and Update II and Management and and Teambuilding I. Plan upcoming workshops.
Beckner Beth	8/29/90 - 9/27/90	26	Conduct two scheduled workshops: Basic Management and Teambuilding II and III. Design and conduct a workshop for the Council of Women Leaders in Family Planning.
El-Khazen Doris	10/21/88 - 10/26/88	4.5	Review, and make recommendations upon project management. Assist the IDP director in reveiwing IDP implementation status and advise on strategies and methods to enhance project performance.

**SUMMARY OF CONSULTANT TRIPS  
(July, 1988 - December, 1990)**

<u>Consultant</u>	<u>Trip Dates</u>	<u>In-Country Workdays</u>	<u>Summary of Scope of Work</u>
Heilman, Elizabeth	7/18/89 - 8/12/89	17.5 *	Analyze USAID project incentive systems to recommend best use of incentives for long-term FP program sustainability; design and undertake study on FP issues of cost-recovery, pricing, donor and GOE contributions in order to present recommendations concerning sustainability of FP programs in Egypt.
Heilman, Elizabeth	9/10/89 - 10/ 2/89	15 *	Undertake study in order to present recommendations on cost of FP programs in Egypt; as appropriate, design and undertake study on FP issues of cost-recovery, pricing, donor and GOE contributions, and present recommendations concerning sustainability of FP programs in Egypt.
Heilman, Elizabeth	10/25/89 - 11/14/89	16 *	Undertake study in order to present recommendations on cost of FP programs in Egypt; as appropriate, design and undertake study on FP issues of cost-recovery, pricing, donor and GOE contributions, and present recommendations concerning sustainability of FP programs in Egypt.
Heilman, Elizabeth	12/20/89 - 1/19/90	27	Undertake study in order to present recommendations on cost of FP programs in Egypt; as appropriate, design and undertake study on FP issues of cost-recovery, pricing, donor and GOE contributions, and present recommendations concerning sustainability of FP programs in Egypt.

\* IDP workdays (Trip shared with other projects)

**SUMMARY OF CONSULTANT TRIPS**  
(July, 1988 - December, 1990)

<u>Consultant</u>	<u>Trip Dates</u>	<u>In-Country Workdays</u>	<u>Summary of Scope of Work</u>
Heilman, Elizabeth	3/ 2/90 - 3/29/90 .	26	Continue work on the family planning cost study in order to prepare the final draft report including methodology, data collection and analysis.
Heilman Elizabeth	11/26/90 - 12/14/90	17	Refine and reach a consensus with USAID and the NPC on the family planning cost study methodology; to revise the July 1988 - June 1989 family planning cost study in accordance with the revised methodology; and begin collecting data for the 1989/1990 family planning cost study.
Marsh Noel	10/17/90 - 11/15/90	26	Continue the work needed to develop operating Procedure Manuals for the NPC/Governorate Offices.
Martinkosky Margaret	7/ 9/90 - 8/ 1/90	20	Gather information for preparation of Sub-Project Paper budgets for RCT Ain Shams Univ., IDP National Population Council, CEOS and Al Azhar Family Planning Projects, and prepare draft and final budgets.
Martinkosky Margaret	9/19/90 - 10/19/90	26	Conduct a systems analysis of the financial management system of the NPC as the initial step in writing policies and procedures for the NPC. Prepare the final budget for the IDP/NPC project for the period 1988 - 1992.
Murrell Kenneth	11/19/89 - 12/14/89	22	Begin initial assessment of team building needs within context of institution building strategy. Selection and Development of approaches to be used in Team Building.

**SUMMARY OF CONSULTANT TRIPS**  
(July, 1988 - December, 1990)

<u>Consultant</u>	<u>Trip Dates</u>	<u>In-Country Workdays</u>	<u>Summary of Scope of Work</u>
Ober Ellen	7/17/88 - 8/15/88	25	Assist with planning and scheduling management systems analysis and redesign activities and the preparation of detailed work activities. Assist with preparing reports of systems analysis findings for up-grading management operating policies, procedures, and formats of NPC/TS and NPC/G offices. Assist with preparation of revised and/or new management operations manuals to be utilized for management training.
Ober Ellen	10/24/88 - 11/18/88	23	Assist with review and completion of TEAM MISR management systems analysis activities and preliminary diagnostic report. Assist with developing plans for team building workshops. Assist with preparing management systems development workplan for second project year.
Ober Ellen	12/ 2/88 - 12/16/88	14	Integrate TEAM MISR recommendations, IDP, and NPC plans into a new NPC plan. Complete an IDP implementation plan for calendar year 1989.
Ober Ellen	1/ 8/89 - 1/20/89	12	Assist IDP director with preparation of Quarterly Progress Report and workplan. Integrate Secretary General's comments and direction from 12/27/88 Council Meeting into Annual Work Plan for 1989.
Petrich Ernest	6/ 3/88 - 6/26/88	18*	Assist the NPC in the initiation and implementation planning of the IDP. Assist the NPC IDP Director to prepare the first IDP implementation progress report for the period January to June, 1988.

\* IDP workdays (Trip shared with other projects)

**SUMMARY OF CONSULTANT TRIPS**  
(July, 1988 - December, 1990)

<u>Consultant</u>	<u>Trip Dates</u>	<u>In-Country Workdays</u>	<u>Summary of Scope of Work</u>
Petrich Ernest	7/ 2/88 - 7/30/88	9*	Assist IDP Director in completing first quarterly project implementation progress reports, including the preparation of up-dated project implementation plans for the third quarter of the first project year; assist with mobilizing host country management and research technical assistance contractors; complete assessment for executive leadership course and Study Tour scheduled for February-March, 1989.
Petrich Ernest	9/19/88 - 11/ 4/88	12*	Assist in preparing quarterly project implementation progress report for third quarter of first project year, and finalizing project implementation plans for fourth quarter of first project year. Assist with review and improvement of management systems analysis reports, draft management policy and procedures manuals, and assist in training development activities.
Petrich Ernest	4/10/89 - 4/28/89	17	Assist USAID and GOE in extensive project design and redesign activities, particularly with respect to the NPC Institutional Development Project.
Petrich Ernest	5/18/89 - 6/ 8/89	18.5	Assist USAID and GOE in extensive project design and redesign activities, particularly with respect to the NPC Institutional Development Project.
Petrich Ernest	7/16/89 - 7/27/89	10	Assist USAID and GOE in extensive project design and redesign activities, particularly with respect to the NPC Institutional Development Project.

\* IDP workdays (Trip shared with other projects)

70

**SUMMARY OF CONSULTANT TRIPS**  
 (July, 1989 - December, 1990)

<u>Consultant</u>	<u>Trip Dates</u>	<u>In-Country Workdays</u>	<u>Summary of Scope of Work</u>
Petrich Ernest	9/11/89 - 9/27/89	11*	Assist with finalizing the IDP Implementation Plan and Budget, develop technical assistance plans and schedules, assist with coordinating technical assistance inputs, prepare technical assistance Scopes of Work, mobilize technical assistance and provide management consulting assistance as requested.
Petrich Ernest	11/ 5/89 - 11/27/89	8.5*	Assist new IDP Director in re-startup of project implementation activities; orient new LTA and STC's Drs. Alkhateeb, Murrell and Beckner; and assist with conceptualization of new population information system component.
Petrich Ernest	2/19/90 - 3/12/90	10.5*	Review IDP Implementation Status; Assist with PIS Component 3 design; develop Military Family Planning Project Paper; assist Ain Shams University in Management Training Development; assist USAID with Technical Assistance Planning and Management Plan; install Logistical Systems for IDP/EPA LTA.
Petrich Ernest	5/22/90 - 7/30/90	28 *	Conduct Situational Analysis of HIO Family Planning Project; gather information for preparation of Sub-Project Papers for RCT Ain Shams University, IDP National Population Council, CEOS and Al Azhar Family Planning Projects. Review implementation status of IDP/NPC Project.

\* IDP workdays (Trip shared with other projects)

**SUMMARY OF CONSULTANT TRIPS**  
(July, 1988 - December, 1990)

<u>Consultant</u>	<u>Trip Dates</u>	<u>In-Country Workdays</u>	<u>Summary of Scope of Work</u>
Rittmann Joseph	4/14/89 - 4/20/89	5	Assist the USAID mission and Government of Egypt in project design and redesign activities with respect to the National Population Council Institutional Development Project, and the Junior Medical Doctor Association Project.
Schneider Rose	10/28/88 - 12/ 9/88	38	Provide technical assistance to develop the training and management of training capacity of the training unit and training specialists of the NPC.

**APPENDIX E.**

**BIBLIOGRAPHY OF MAJOR DOCUMENTS PRODUCED  
THROUGH TECHNICAL ASSISTANCE**

13

BIBLIOGRAPHY OF MAJOR DOCUMENTS PRODUCED  
THROUGH TECHNICAL ASSISTANCE

- Albright, William. "Trip Report." September, 1989.
- Albright, William. "1991 IDP Implementation Plan." September, 1989.
- Albright, William. "Procedure/Operations Manuals for NPC/TS and NPC/G offices." August, 1989.
- Albright, William. "Trip Report." April, 1990.
- Albright, William. "NPC Population Information System (PIS) - IDP Project Component Three." 1990.
- Albright, William. "Interim Report of Activities and Future Plans." January, 1990.
- Albright, William. "Discussion Paper - Population Information System/NPC." January, 1990.
- Albright, William. "Trip Report." August, 1990.
- Alkhateeb, Waleed. "Trip Report." December, 1989.
- Alkhateeb, Waleed. "IDP Orientation Materials." December, 1989.
- Alkhateeb, Waleed. "IDP Implementation Plan." December, 1989.
- Alkhateeb, Waleed. "Workshop on Review and Preparation of Policies and Plans 1990 - 1991." December, 1989.
- Alkhateeb, Waleed, et al. "Contraceptive Technology Update" (Arabic). Feb 26 - 28, 1990.
- Alkhateeb, Waleed, et al. "Basic Management Course" (Arabic). March 17 - 22, 1990.
- Alkhateeb, Waleed, et al. "Basic Management Workshop" (Arabic). May 5 - 9, 1990.
- Alkhateeb, Waleed, et al. "Basic Management and TeamBuilding Workshop I" (Arabic). July 1990.
- Alkhateeb, Waleed, et al. "Basic Management and TeamBuilding Workshop II and III" (Arabic). Institute for Training and Research in Family Planning (ITRFP), Alexandria. September 8 - 13 and 15 - 20, 1990.

14

**BIBLIOGRAPHY OF MAJOR DOCUMENTS PRODUCED  
THROUGH TECHNICAL ASSISTANCE**

- Alkhateeb, Waleed, et al. "Workshop Design for the Council of Women Leaders in Family Planning" (Arabic). ITRFP, Alexandria. December 1990.
- Alkhateeb, Waleed, et al. "Monitoring and Evaluation Workshop for Population Activities on the Governorate Level" (Arabic). February 2 - 7, 1991.
- Alkhateeb, Waleed, et al. "Monitoring and Evaluation Workshop" (Arabic). ITRFP, Alexandria. February 23 - 28, 1991.
- Alkhateeb, Waleed, et al. "Planning Workshop" (Arabic). March 9 - 14, 1991.
- Alkhateeb, Waleed, et al. "Population Dynamics Training Course" (Arabic). April 27 - May 2, 1991.
- Alkhateeb, Waleed, et al. "Advanced Management Course. Advanced TeamBuilding Skills: Communication, Motivation, Negotiation, and Conflict Management" (Arabic).
- Alkhateeb, Waleed, et al. "Monitoring and Evaluation Course" (Arabic).
- Alkhateeb, Waleed, et al. "Population Dynamics Course" (Arabic).
- Alkhateeb, Waleed, et al. "Training Schedule for 1991."
- Alkhateeb, Waleed, et al. "Budget: October 1990 - December 1992."
- Alkhateeb, Waleed, et al. Quarterly Reports.
- Alkhateeb, Waleed, et al. "Annual Report: 1990" (Arabic and English).
- Alkhateeb, Waleed, et al. "Manual for Population Planning at the Governorate Level" (Initial report, Arabic).
- Alkhateeb, Waleed, et al. "Final Report: Training Course about the Principles of Management" (Arabic). July 1990.
- Alkhateeb, Waleed, et al. "Manual for Family Planning on the Governorate Level" (Initial report 2, Arabic). March 1991.
- Alt, David. "Trip Report." September, 1988.
- Alt, David. "Review of NPC Training Function: Report of Findings, Conclusions, and Recommendations." August, 1988.

**BIBLIOGRAPHY OF DOCUMENTS PRODUCED  
THROUGH TECHNICAL ASSISTANCE**

- Beckner, Beth. "Trip Report." December, 1989.
- Beckner, Beth. "Training Manual for Contraceptive Technology Workshop." December, 1989.
- Beckner, Beth. "Training Manual for Management/Planning Workshop." December, 1989.
- Beckner, Beth. "Guidelines for Modern Competency Based Training." December, 1989.
- Beckner, Beth. "Effective Training and Evaluation Methods." December, 1989.
- Beckner, Beth. "Trip Report." March, 1990.
- Beckner, Beth. "Contraceptive Technology Course Schedule." March, 1990.
- Beckner, Beth. "Workplan Development Workshop." March, 1990.
- Beckner, Beth. "1990 - 1991 Training Schedule." March, 1990.
- Beckner, Beth. "Decoding Exercise Instructions and Drawings." March, 1990.
- Beckner, Beth. "Trip Report." May, 1990.
- Beckner, Beth. "Workplan Development Workshop II Schedule." May, 1990.
- Beckner, Beth. "Workshop on Population Planning at the Governorate Level (Workshop I)." May, 1990.
- Beckner, Beth. "Workshop Evaluation Questionnaire (Arabic)." May, 1990.
- Beckner, Beth. "Population Planning Manual (Arabic)." May, 1990.
- Beckner, Beth. "Trip Report." July, 1990.
- Beckner, Beth. "Contraceptive Technology II (Review and Update): Training Design and Daily Schedule." April, 1990.
- Beckner, Beth. "Management/Teambuilding I: Training Manual and Daily Schedule." April, 1990.
- Beckner, Beth. "Trip Report." September, 1990.

**BIBLIOGRAPHY OF DOCUMENTS PRODUCED  
THROUGH TECHNICAL ASSISTANCE**

- Beckner, Beth. "Management Training Manual: Basic Management and Teambuilding Workshop II and III." August, 1990.
- Beckner, Beth. "Objective and Task Analysis for Training Women's Council Members." August, 1990.
- Beckner, Beth. "Training Design and Schedule for Women's Council Workshop." December, 1990.
- Beckner, Beth. "Draft Training Manual for Monitoring and Evaluation Workshop I." August, 1990.
- El-Khazen, Doris. "Trip Report." October, 1988
- Heilman, Elizabeth. "Trip Report." August, 1989.
- Heilman, Elizabeth. "Trip Report." October, 1989.
- Heilman, Elizabeth. "Trip Report." November, 1989.
- Heilman, Elizabeth. "Memorandum on GOE Contributions to Population Project (1983 - 1993)." December, 1989.
- Heilman, Elizabeth. "Worksheet Forms for Organizing Data Collected. Completed for MOH, CHO, THO, HIO, CSI, SIS/IEC and EPTC." December, 1989.
- Heilman, Elizabeth. "Trip Report." January, 1990.
- Heilman, Elizabeth. "Preliminary Report on the Cost of the Family Planning Program in Egypt." January, 1990.
- Heilman, Elizabeth. "Trip Report." March, 1990.
- Heilman, Elizabeth. "Draft Report on the Costs of the Family Planning Program in Egypt: The Costs to the Public Sector per Couple-Year's Protection and per User for the Period July 1, 1988 through June 30, 1989." March, 1990.
- Heilman, Elizabeth. "Cost Implications of Attaining the National Goal of Reducing the Population Growth Rate to 2.1 Percent: Some Scenarios." March, 1990.
- Heilman, Elizabeth. "Trip Report." December, 1990.
- Heilman, Elizabeth. "Three Versions of the Family Planning Cost Study Methodology Prepared in Cairo: December 3, 9, and 13, 1990. December, 1990.

**BIBLIOGRAPHY OF DOCUMENTS PRODUCED  
THROUGH TECHNICAL ASSISTANCE**

- Marsh, Noel. "Trip Report." November, 1990.
- Marsh, Noel. "Working Paper on the Description of NPC/TS Roles and Responsibilities." November, 1990.
- Marsh, Noel. "Identification of Major NPC/G Management and Administration Tasks." November, 1990.
- Martinkosky, Margaret. "Trip Report." August, 1990.
- Martinkosky, Margaret. "Project Budgets for Ain Shams University, CEOS, Al Azhar University, and IDP/NPC." August, 1990.
- Martinkosky, Margaret. "Trip Report." October, 1990.
- Martinkosky, Margaret. "The Central Management of Financial and Administrative Affairs." October, 1990.
- Martinkosky, Margaret. "Budget of Service Agencies, Financial Year 1989/90, Health Service Sector." October, 1990.
- Martinkosky, Margaret. "Up-Dated Ain Shams University Budget." December, 1990.
- Murrell, Kenneth. "Trip Report." December, 1989.
- Ober, Ellen. "Trip Report." August, 1988.
- Ober, Ellen. "Trip Report." November, 1988.
- Ober, Ellen. "The NPC Organizational Development Study: The Preliminary Findings of the Diagnostic Study." November, 1988.
- Ober, Ellen. "Trip Report." December, 1988.
- Ober, Ellen. "The Project During 1988: Achievements, Delays, Future Prospects." December, 1988.
- Ober, Ellen. "The Project Implementation Plan for 1989." December, 1988.
- Ober, Ellen. "Trip Report." January, 1989.
- Ober, Ellen. "Workplan for 1989." January, 1989.
- Petrich, Ernest. "Trip Report." June, 1988.

**BIBLIOGRAPHY OF DOCUMENTS PRODUCED  
THROUGH TECHNICAL ASSISTANCE**

- Petrich, Ernest. "Trip Report." July, 1988.
- Petrich, Ernest. "Suggested Workplan for SPAAC Technical Support to Research Department of National Population Council. July, 1988.
- Petrich, Ernest. "Trip Report." November, 1988.
- Petrich, Ernest. "IDP Quarterly Progress Report, July to September, 1988." November, 1988.
- Petrich, Ernest. "Trip Report." April, 1989.
- Petrich, Ernest. "Egypt 21 - Dakahlia Governate Population Plan." April, 1989.
- Petrich, Ernest. "Revised IDP Project Implementation Plan - Partial Draft." May, 1989.
- Petrich, Ernest. "Private Practitioners' Family Planning Project - An Egyptian Junior Medical Doctors' Association (EJMDA) Project." May, 1989.
- Petrich, Ernest. "Trip Report." June, 1989.
- Petrich, Ernest. "Project Paper - NPC Institutional Development Project (IDP) - Third Version" June 1989.
- Petrich, Ernest. "Project Paper - EJMDA Private Practitioners' Family Planning Project (PPFPP)." June, 1989.
- Petrich, Ernest. "Trip Report." July, 1989.
- Petrich, Ernest. "Task Force on Population Planning." 1989.
- Petrich, Ernest. "Revised Egypt 21 Workplan." 1989.
- Petrich, Ernest. "Amendment to the Sub-Project Paper: Comprehensive Urban Planning Service in Greater Cairo." Cairo Health Organization. August, 1989.
- Petrich, Ernest. "Trip Report." September, 1989.
- Petrich, Ernest. "IDP Implementation Plan." 1989.
- Petrich, Ernest. "Trip Report." November, 1989.
- Petrich, Ernest. "Trip Report." March, 1990.

**BIBLIOGRAPHY OF DOCUMENTS PRODUCED  
THROUGH TECHNICAL ASSISTANCE**

- Petrich, Ernest. "IDP Quarterly Progress Report, September - December, 1989. March, 1990.
- Petrich, Ernest. "IDP Project Paper (Component III) Population Information System." March, 1990.
- Petrich, Ernest. "First Draft Project Paper - Military Responsible Fatherhood Project (MRFP)." April, 1990.
- Petrich, Ernest. "Trip Report." July, 1990.
- Petrich, Ernest. "Situational Analysis of the Egyptian Health Insurance Organization (HIO) Family Planning Services Project." (Trip Report, Volume I of V). August, 1990.
- Petrich, Ernest. "IDP Project Paper, 4th Version." (Trip Report, Volume II of V). August, 1990.
- Petrich, Ernest. "Project Design Summary: Logical Framework NPC/IDP." August, 1990.
- Petrich, Ernest. "NPC/G Institutional Development Phasing Plan." August, 1990.
- Petrich, Ernest. "PDS Development Phasing Plan." August, 1990.
- Petrich, Ernest. "NPC/G Staffing Status - June, 1989." August, 1990.
- Petrich, Ernest. "NPC/G Office Space Renovation Status - As of June, 1989." August, 1990.
- Petrich, Ernest. "Vehicle Transportation Status - As of June, 1989." August, 1990.
- Petrich, Ernest. "Position Description - Resident Management Advisor." January, 1990.
- Petrich, Ernest. "Regional Center for Training (RCT) Project Paper." (Trip Report, Volume III of V). August, 1990.
- Petrich, Ernest. "A Proposal for Satellite Training Centers for Training in Clinical Family Planning." Ain Shams University. May, 1990.
- Petrich, Ernest. "Key RCT Position Descriptions, 1990." May, 1990.

**BIBLIOGRAPHY OF DOCUMENTS PRODUCED  
THROUGH TECHNICAL ASSISTANCE**

- Petrich, Ernest. "Revenue Agreement Between the USAID and Ain Shams University Regional Center for Training in Family Planning (RCT)." May, 1990.
- Petrich, Ernest. "Al Azhar Project Paper." (Trip Report, Volume IV of V). August, 1990.
- Petrich, Ernest. "Estimated Contraceptive Commodity Requirements." May, 1990.
- Petrich, Ernest. "Estimated Income from Family Planning Services and Contraceptive Sales." August, 1990.
- Petrich, Ernest. "Commodities Procurement List." August, 1990.
- Petrich, Ernest. "Project Staffing Plan." August, 1990.
- Petrich, Ernest. "Family Planning Services Project of the International Islamic Center for Population Studies and Research (IIC)." Al Azhar University. September, 1990.
- Petrich, Ernest. "Rural Community Based Family Planning Project of the Coptic Evangelical Organization for Social Services (CEOSS)." (Trip Report, Volume V of V). September, 1990.
- Rittman, Joseph. "Trip Report." April, 1989.
- Schneider, Rose. "Trip Report." December, 1988.