

EMBASSY OF THE  
UNITED STATES OF AMERICA

Office of Development Affairs  
September 28, 1987

Black Management Forum  
14th Floor  
Mobil Centre  
6 Plein Street  
Johannesburg 2001  
South Africa

Subject: Agreement No. : 674-0303-G-00-7044-00  
Recipient Name: Black Management Forum

Dear Sirs:

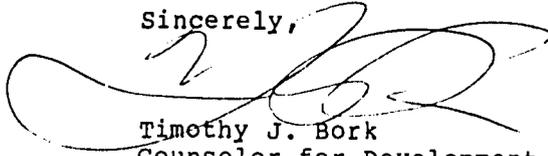
Pursuant to the authority contained in the Foreign Assistance Act of 1961, as amended, the Agency for International Development (hereinafter referred to as "USAID") hereby enters into this Agreement with the Black Management Forum (also referred to as the "Recipient"), the sum of \$300,000 (three hundred thousand U.S. dollars) to provide support for the program as described in Attachment No.1 entitled "Schedule" of this Agreement and Attachment No.2, entitled "Program Description."

This Agreement is effective and obligation is made as of September 28, 1987. The Agreement and obligation shall apply to commitments made by the Recipient in furtherance of program objectives during the period beginning September 28, 1987 and ending December 31, 1989.

This Agreement is entered into with the Black Management Forum on condition that the funds will be administered in accordance with the terms and conditions set forth in Attachment 1, entitled "Schedule", Attachment 2, entitled "Program Description" and Attachment 3, entitled "Standard Provisions. This letter and the three attachments described above, which have been agreed to by your organization, constitute the Agreement.

Please sign the original and six (6) copies of this letter. Please then return the original and five (5) copies of this letter to USAID/Pretoria.

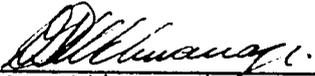
Sincerely,



Timothy J. Bork  
Counselor for Development Affairs

ACKNOWLEDGED AND ACCEPTED

Black Management Forum



By: Don Mkhwanazi  
Title: President

Date

9/25/87

ATTACHMENTS

1. Schedule
2. Program Description
3. Standard Provisions
4. Twelve-month Budget

FISCAL DATA

Project Name . South Africa Black Private Enterprise  
Development  
Project Number : 674-0303  
Agreement Number : 674-0303-G-00-7044-00  
Appropriation :  
Budget Plan Code :  
Allowance :  
Amount Obligated : \$300,000  
Recipient : Black Management Forum

Draft: DRobertson/PDO;0015C;8/15/87

Clearances: WStickel, AD (draft)  
MJohnson, SPDO (draft)  
CPascual, PROG (draft)  
DKeene, RLA (draft)  
RSolloway, CONT (draft)

ATTACHMENT ONE

SCHEDULE

I. Overview of Agreement

A. Purpose of Agreement - This Agreement provides financial resources to the Black Management Forum (BMF) to become a primary and influential lobbying voice in representing the interests of black managers in South Africa's business sector against the inequities of apartheid, as more fully described in Attachment Two of this Agreement, entitled "Program Description".

B. Substantial USAID Involvement - The parties expect substantial involvement by USAID in the Recipient's performance of the program, including : (1) involvement as provided for under the Conditions Precedent as set forth in Section XI below; (2) monitoring of the Recipient's activities to permit specific adjustments to or redirection of its work; and (3) involvement in planning critical elements in the implementation plan.

II. Period of the Agreement

The effective date of this Agreement is September 28, 1987. The expiration date is December 31, 1989, meaning that no USAID funds shall be applicable under the Agreement to goods not furnished and services not performed for the program by this date.

III. Agreement Funding and Payment

USAID hereby obligates the amount of three hundred thousand U.S. Dollars (\$300,000) for purposes of this Agreement.

IV. Recipient Resources

1. The Recipient agrees to provide or cause to be provided for the Agreement program all funds, in addition to funds provided under the Agreement, and all other resources required to carry out the Agreement program effectively and in a timely manner.

2. Based on historic and probable revenue and expenditure projections, BMF's anticipated contributions to the Agreement program will total an estimated \$120,000, or some 25% of the program's total direct, indirect and in-kind costs, over the life of the Agreement.

## V. Financial Management

A. The Black Management Forum shall be responsible for accounting for all funds provided under this Agreement. Reimbursement for expenses incurred shall be in the form of a monthly submission of invoices, checks, payroll sheets, etc. as further described in Part B of this Section. Included in this Agreement, as Attachment 4, is a one-year budget based upon expected expenditures covered by this Agreement. This budget also reflects quarterly cash flow requirements and represents BMF's request for a 30-day advance. A sufficient advance of funds will be provided to cover expenses for three months of operations. Execution of this Agreement constitutes USAID approval of the advance, and for AID's internal purposes, earmarks and commits all funds obligated under the Agreement. Any interest earnings from funds provided under this Agreement will be returned to USAID.

### B. Disbursement Procedures

1. Local currency disbursements from USAID to BMF will be made through monthly reimbursements for expenses incurred during the previous month. Each reimbursement request will include (a) a summary sheet listing in a format compatible with the budget the purpose and amount of all (individual) expenses incurred with a sub-total for each budget line item and a grand total; and (b) copies of paid invoices (not pro forma invoices), checks, or other documentary evidence showing that funds were expended and the payee received such funds; e.g. an invoice stamped "paid", a cancelled check, a payroll sheet signed by the employee, etc.

2. Advances. It is recognized that an advance of funds is required, as working capital, to carry out the purposes of this Agreement. Refer to Section V.A. and Attachment 4 which requests such an advance.

(a) As discussed in para B.1. above, monthly expenses are reimbursed. As such, USAID will reimburse the Recipient for recurring expenses financed from the advance, but non-recurring expenses financed from the advance will not be reimbursed. Rather than reimburse non-recurring expenses, the amount of the advance will be reduced by that amount. Consequently, when the Recipient submits its monthly reimbursement request per paragraph B.1., it is most important to include those expenses which will be used to reduce the advance balance.

(b) At the end of the Agreement period, any advance balance will be liquidated through submission of paid invoices and/or cash.

(c) Should there be a need to increase the level of the advance, USAID should be notified in writing at least 90 days before the required increase. USAID will advise, in

writing, of any approved increases. Likewise, USAID reserves the right to decrease the level of this advance should expenditures fall below projected levels.

## VI. Financial Plan

A. The illustrative Financial Plan for this Agreement is set forth in Table 1, below. Revisions of this Plan shall be made in accordance with Standard Provision 4 of this Agreement, located in Attachment 3 and entitled "Revision of Agreement Budget". Line item adjustments exceeding fifteen percent must receive prior USAID approval.

<u>Line Item</u>	<u>US \$</u>	<u>SAR</u>
Technical Assistance	90,000	166,500
Training	27,000	49,950
Travel Transportation	28,000	51,800
Salaries/Admin Costs	65,000	120,250
Research Activities	50,000	92,500
Commodities	20,000	37,000
Evaluation and Audit	20,000	37,000
TOTAL	<u>300,000</u>	<u>555,000</u>

### B. Level of Assistance

The budget line items provided in Table 1 have been calculated by taking the amounts required by the Recipient in South African Rands and then converting these to U.S. Dollars at an exchange rate of R1.85/US\$1. While the Rand amounts are included in Table 1 for illustrative purposes, the U.S. Dollar totals, and not their Rand equivalents, constitute the binding level of USAID assistance.

Due to exchange rate fluctuations, South African Rands available under any individual item financed under this Agreement may exceed levels budgeted for by the Recipient, and thus allow other items to be financed as well. In such an event, the Recipient will consult with USAID on the priority use of these funds, and arrangements will be made to amend the Agreement to provide for their expenditure. However, should changes in the exchange rate result in fewer South African Rands being available than budgeted for, the Recipient must finance the shortfall since the U.S. Dollar amount prevails.

## VII. Reporting and Evaluation

A. Reporting - The Recipient shall submit progress reports on a semi-annual basis, indicating actual accomplishments financed by the Agreement. The outputs of the program should be quantified such as the number of seminars or other types of activities made possible by this Agreement. A brief description of the activities undertaken or assisted during the period, and any potentially broad implications, should also be included.

B. Evaluation - This Agreement provides for two evaluations during the two years of implementation; the first after twelve months of implementation (approximately September 1988), and a final evaluation three months prior to the end of the Agreement (October 1989).

1. Mid-term Evaluation - In collaboration with USAID/South Africa and BMF, an external mid-term evaluation will be scheduled one year after the signing of the Agreement. The purpose of the evaluation will be to check progress against benchmarks established in the implementation plan, and make any recommendations or adjustments for the remainder of the project. It is hoped that the services of a private sector specialist will be contracted for two weeks using Agreement funds.

2. Final Evaluation - An external final evaluation will be scheduled three months prior to the end of the Agreement (approximately October 1989). The purpose of the final evaluation will be to ensure that the objectives of the Agreement have been achieved and to recommend future development objectives for BMF. The possibility of continued funding remains open and will be addressed in this final evaluation.

3. Audit - The Agreement will make provision for a final audit to be carried out by an independent audit firm.

#### VIII. Overhead Rate

Not applicable.

#### IX. Title to Property

Title to all property purchased under this Agreement shall vest in the Recipient in accordance with Attachment 3, Additional Standard Provision 19, entitled "Title to and Use of Property".

#### X. Authorized Geographic Code

The authorized code for all procurement with AID funds under the Agreement is the United States and the Republic of South Africa, meaning that all goods and services financed by this Agreement shall have, with respect to goods, their source and origin and, with respect to services, their nationality in the United States or the Republic of South Africa.

#### XI. Local Cost Financing

It is hereby specified that the amount of U.S. Dollars authorized to be used for local cost financing is the entire amount obligated under this Agreement.

## XII. Special Provisions

### A. Conditions Precedent

1. Prior to the disbursement of any funds under this Agreement for administrative costs or commodities, the Recipient shall provide, in form and substance satisfactory to AID, evidence that it has:

- a. reviewed in a comprehensive manner its goals and priorities at the level of the Board of Directors; and,
- b. based on the above review, revised its program strategy as necessary, and prepared new informational materials for a Membership Drive.

2. Prior to the disbursement of any funds under this Agreement during its second year, the Recipient shall provide, for AID review, its five-year Action Plan.

### B. Covenants

#### 1. Procurement

(a) Scope. This provision is applicable to the extent that local cost financing is otherwise authorized by the Agreement. It does not require procurement in South Africa where off-shore procurement could otherwise occur.

(b) Policy. In the procurement of goods and services in South Africa, the Recipient shall, to the maximum extent practicable, award contracts to individuals or organizations which are disadvantaged by apartheid and which are responsive and appropriate providers of goods and services.

(c) Definitions. Individuals and organizations disadvantaged by apartheid shall mean (1) South African individuals of black, "colored" or Asian descent whose principal place of business is in the Republic of South Africa; and (2) private partnerships or commercial firms which are incorporated in or organized under the laws of the Republic of South Africa, whose principal place of business is in the Republic of South Africa, and which are more than 50 percent beneficially owned by South African persons of black, "colored" or Asian descent. The Republic of South Africa includes the so-called "independent" and "self-governing" homelands and, for the purposes of implementing this provision, Namibia.

(d) Except as provided in Section B.1. above, all procurement transactions shall be conducted in a manner to provide, to the maximum extent practical, open and free competition.

2. Allowable Costs - Travel and per diem expenses reimbursed under the Agreement may not exceed the maximum allowed by BMF's own policies and payment procedures.

3. Eligibility of BMF Members - BMF members involved in the selection process of contractors financed under the Agreement shall not be eligible to bid on such contracts. Except as provided above, BMF members are eligible to bid on contracts financed under the Agreement provided competitive procedures are utilized.

XIII. Standard Provisions

The Standard Provisions applicable to this Agreement are contained in Attachment 3, Standard Provisions.

ATTACHMENT TWO  
PROGRAM DESCRIPTION

The Black Management Forum

I. Summary

In contemporary South Africa, the opportunities for black managers in business have expanded as a consequence of a variety of factors, including increased white emigration and the more active role played by some corporations in response to social integration advocacy programs such as the Sullivan Code. Yet progress has been slow due to the political, economic and cultural inertia of apartheid which is still clearly predominant in South Africa's business environment. Significant changes still remain to be effected which will only occur at the behest of a strong advocacy organization fighting for more and better professional opportunities for black managers while representing the interests of black South Africans in the business sector.

The Black Management Forum (BMF) is one of the most important organizations promoting the role of blacks in the business sector in South Africa and has the potential to be key force against apartheid. To date, however, BMF has played a comparatively stronger role in creating an awareness of the emerging black manager, and has had a growing but more limited success representing black managers' interests. With the help of AID funds, BMF seeks to increase its influence in the business sector lobbying on behalf of the interests of black managers in South Africa against the inequities of employment and professional growth opportunities perpetuated by apartheid. Achievement of this goal is contingent upon a serious program of affirmative action directed at corporate South Africa, strengthened documentation through continued research of the inequities against blacks in the business sector, an increase in membership to include a greater percentage of South Africa's most successful businesspersons, and strengthened regional chapters to put forth more action-oriented programs with progressive agendas and specific, relevant action plans.

II. Background

A. Black Private Enterprise Development Project

The Black Private Enterprise Development Project is intended to address the multitude of constraints resulting from "racial capitalism" in an apartheid South Africa, which prevents blacks, including both private entrepreneurs and managers in the primary business sector, from fully participating in the South African economy. This Project has been designed as an umbrella project, owing to the broad range of constraints faced by the black private sector, and therefore finances various agreements with South African non-governmental organizations (NGOs) providing assistance to the black private sector in areas of Institutional Development and Advocacy, Micro and Small Enterprise

Development, and Participation in the Primary Economy. Agreements are selected according to specified criteria which ensure that organizations financed under the project are black-owned and managed, or demonstrate genuine commitment to black participation in decision making and leadership; have the support of credible black community and business leaders; provide the program with a broad geographic base; are technically and financially sound; and promote equitable black participation in the economy, thereby promoting a peaceful end to apartheid.

#### B. The Black Management Forum

The Black Management Forum (BMF) was established in 1976 in response to the perceived need among a small group of black managers and business leaders for mutual support against the obstacles blacks faced in gaining meaningful career advancement opportunities in corporate South Africa. Of some prominence locally, it was not until the introduction of the Sullivan Principles and the resulting efforts of more progressive corporations demonstrating their commitment to black advancement that the organization became a visible entity. Even though companies found it difficult to effect meaningful advancement programs within their offices, they did begin to establish active contact and provide support to outside groups that represented these aims. By this time, BMF had gained a considerable amount of attention as a unique organization promoting the interests of black managers in the business sector and was the logical recipient of corporate support.

Although originally established as a support organization, in recent years BMF has expanded its efforts to include training and communications to build greater awareness, through research, of the inequalities in the economic system and the importance of career advancement for its membership. This has included periodic workshops designed to assist in developing the management skills of its membership, and production of a quality local publication, The Black Leader, a quarterly journal highlighting the roles of black managers in a changing South Africa. Emphasis was also placed on establishing positive role models through annual recognition of a Black Manager of the Year.

BMF is financed almost totally by corporate donors who sponsor programs and provide modest office facilities (there are 70 corporate members as compared with 660 individuals). This has put the organization into the difficult position of having to seek primary support from the very entities it has organized itself to challenge. Membership fees are artificially low to attract members, and consequently provide only a fraction of required operating costs.

The organization is governed by a Board of Directors that consists of elected officers and branch chairpersons in all branch offices. Committee portfolios exist at the branch level which include Education and Training, Research and Information, Membership, Publicity/Public Relations, and Fund Raising.

### III. Problem

While there can be no doubt of the importance of an organization like BMF to represent the interests of black managers, it is in a position to accomplish much more in fighting for more and better employment opportunities for black managers and also contributing to building a democratic, non-racial South Africa.

BMF has specifically requested support in three key areas, as described below:

A. Organizational and Administrative Capacity - BMF seeks to improve its administrative capacity in the following areas: (1) to attract and support a stronger and more involved membership; (2) to plan and implement advocacy and research programs more effectively; and, (3) to better represent its membership. Through this, it hopes to evolve a clearer role for itself that gives specific definition to its commitment to create more and better job opportunities for black managers. Through this, BMF can be assured of attracting new members and maintaining existing members by demonstrating tangible benefits.

B. Membership Support - BMF's membership today is quite different from the group that established the organization. Today's members are younger and less experienced in the management world. Many have limited work experience, function more as supervisors than managers, and have had little exposure to the private sector. While they bring an important voice to the organization, they require some assistance to develop and execute meaningful programs to advance the interests of black managers as a group. In order to develop the degree of influence necessary to better represent its membership, BMF will explore ways of attracting (a) more influential and experienced black businesspersons who have either never joined or let their membership expire, and (b) greater numbers of managers/supervisors unfamiliar with BMF's goals and objectives.

C. Financial Base - BMF receives the majority of its financial resources from its corporate sponsors. This dependency on corporations places the organization in a paradoxical position: On the one hand, it is seeking to challenge the "corporate system's" treatment of black managers; while on the other hand, the "system" provides the funds to carry out the program. This position has, at times, created the impression among some younger blacks, trade unions and other more change-oriented organizations that the black manager is, de facto, supportive of an apartheid system reinforced by a white-dominated economy. To counter this, BMF aggressively seeks a broader base of financial support, perhaps in the form of services, publications, and training programs. The potential for this type of generation is evidenced by the success of a

recent conference hosted by the Durban chapter which returned a significant profit.

#### IV. Purpose

In recognition of the leading role to be played by BMF advocating a higher profile for black managers and preparing them for increasingly participative roles in the South African economy, AID has agreed to provide funds to strengthen its advocacy, research and training functions. The purpose of this Agreement, then, is to assist BMF to:

1. implement an organizational development and planning process aimed at becoming a more influential voice in the business sector to create more and better jobs for and promote the interests of black managers;
2. put in place the necessary infrastructure in order to develop and implement programs in advocacy, research and education effectively; and,
3. organize and coordinate a program which attracts a more influential and active membership.

To these ends, this Agreement will fund appropriate technical assistance, studies, conferences and training of BMF leadership, administrative support for staff salaries, and the procurement of limited commodities.

#### V. Program Description

Implementation of this Agreement will follow the broad plan described herein. This plan provides benchmarks for progress against which to evaluate the Agreement's success in achieving its goal and objectives as stated above. The benchmarks are described below with possible activities associated with each of them. Potential AID-funded components are highlighted and the relative timing is discussed. These are also presented as Table 2, as attached.

A. Refine/Define BMF's Role and Priorities - BMF is currently refining its role and priorities in contemporary South Africa in order to establish meaningful and appropriate strategies to strengthen its membership and increase its influence in the South African business sector. It will focus its efforts to act as an advocacy and support organization, providing necessary training to its members, and as an instrument of research and development to document the inequities of the corporate structure by black managers themselves.

The first step in the evaluation of BMF's role and priorities will be a membership survey contracted out to a survey specialist. This will provide an insight into what

prospective members think about the potential of the organization and ways in which it might strengthen its image to attract a larger number of and more influential members. BMF will compete a contract for this survey immediately upon the signing of the Agreement and have the results available for the Executive Retreat described below. A draft scope of work for this contract will be developed in conjunction with USAID soon after the signing of the Agreement which will be funded entirely under the Agreement. BMF will be responsible for soliciting and reviewing proposals, and awarding and administration of the contract.

To permit the national and chapter-level leadership to seriously address important organizational issues, an Executive Retreat will be organized for BMF's Board of Directors when the results of the member survey are available, which will be facilitated by an organizational development specialist recruited from either the U.S. or South Africa. The purpose of the retreat will be to discuss the realities of the organization's future (program goals, membership and financial base, etc.) in light of the response from the survey, and how BMF can best focus its efforts to realistically achieve the goal of becoming a more meaningful organization in the representation of black manager interests in corporate South Africa. Travel and per diem costs of the retreat and the services of the facilitator will be financed under the Agreement.

The results of the retreat should be packaged and produced as a revised organizational prospectus to be used in a subsequent membership drive. This prospectus will be designed with the assistance of a media/production specialist and sufficient copies will be printed for the duration of the Agreement period. This should be prepared by the end of the sixth month of the Agreement. Production and printing costs will be borne by the Agreement.

B. Advocacy Program - BMF has begun to develop a model of affirmative action it will use to negotiate with individual corporations in South Africa. The Agreement will finance further development of this model, incorporating questions into the survey on attitudes toward such a plan. Potential activities financed under the Agreement could include the production and distribution of a video describing a proposal for affirmative action which would be applicable to South Africa, or travel to various international corporation headquarters to lobby for institution of a modest program of hiring and promotion of blacks.

C. Strengthen Organizational Infrastructure - During this preliminary stage of the Agreement, BMF will make adjustments to its organizational infrastructure which will permit it to grow at a measured pace. Under this Agreement, it is envisioned that BMF may hire additional staff and procure information processing equipment for its facilities, as described below.

Membership and fundraising are areas in which BMF seeks to increase its efforts markedly to strengthen its position as an advocacy organization among South African corporations. To this end, the Agreement will finance technical assistance (fundraising specialist) to the national and regional chapter membership committee chairpersons to plan a membership drive, and finance the salary of a national Development Specialist for two years who will be charged with organizing and implementing a national fundraising campaign in coordination with the chapters. Scopes of work for these positions will be developed in consultation with USAID.

Upgrading the facilities is necessary to accommodate the increased activity in membership and fundraising. Accordingly, the Agreement will finance the procurement of information processing equipment and other clerical support supplies for the national office and chapters. These requirements will be detailed by each office and approved by USAID.

D. Develop and Approve an Organizational Action Plan - With the assistance of steps one and two, above, BMF will prepare an organizational plan which takes it into the next five years. In developing its growth and membership plans, BMF will give special consideration to attracting black women managers, who increasingly play an important role in the South African economy, yet are often discriminated against on the basis of both race and sex.

The five-year Action Plan will be developed through a Planning Workshop which will be held near the BMF annual meeting (September) to permit presentation of the plan to the general membership. Costs of the transportation and per diem for the workshop (not to exceed BMF allowances) will be paid by the Agreement, and a management specialist will be contracted to support the workshop, if necessary. The plan will be updated on an annual basis by the same work group and adjusted according to progress.

The Action Plan should place considerable emphasis on the further development and implementation of a model for affirmative action, the membership drive and fundraising plan. Year two of the Agreement will focus on implementation of these and the program plans for BMF.

E. Implement Research Proposals - BMF will continue documenting the inequities of white corporate South Africa in an expanded research program. The Agreement will finance up to \$50,000 to respond to specific proposals for research which demonstrably fight the effects of apartheid and create increased employment opportunities for blacks managers, such as the development of test cases for an affirmative action model. Proposals submitted for funding under this component will be reviewed by the BMF Board of Directors and approved by AID.

F. Reinforce Effective Leadership - Year two of the Agreement will concentrate on the implementation of the Action Plan to reinforce the current and prospective leadership of BMF. Activities are as follows:

1. Study tour of the U.S. - BMF leadership will design a study tour in consultation with USAID/South Africa to visit U.S.-based organizations which have similar mandates to BMF and can provide international contacts for further growth. The tours should provide an opportunity for BMF leadership to visit a range of organizations in business and government which will provide information to be incorporated into seminars and conference reports. The Agreement will fund transportation and per diem for up to four people.

2. Leadership Development Seminars - Leadership development seminars will be offered up to twice yearly at different locations to expose young members to the skills they will need as they move into leadership positions. The Agreement will finance a leadership development specialist and pay travel and per diem for seminar participants (not to exceed BMF allowances). Planning for these seminars will be done in collaboration with USAID and will begin six months after the signing of the Agreement.

3. Career and Personal Development Skills Seminars - BMF has provided this training to new members to prepare young managers with skills in areas such as job search, interviewing skills, business communications, understanding the corporate environment, self-esteem, and creative planning and problem-solving. These workshops will be presented twice yearly by South African managers, business people, consultants, or university instructors. Sponsorship will be sought from other outside sources in South Africa to offset costs.

The direct beneficiaries of AID assistance to BMF are the current and prospective members, whose position in their businesses will reflect the improved image of BMF by increased promotions and greater involvement in the business sector. Black managers will be also trained through BMF-sponsored seminars to improve their capability to function in the South African business environment. In addition, a more relevant BMF will be more likely to attract the attention of white businesses as a credible institution promoting dialogue in preparation for a nonracial South Africa.

The larger beneficiary of a strengthened BMF is the business community in general, which will have access to a network of qualified black managers to help South Africa meet the changing needs of the workplace in a democratic, nonracial South Africa.

Ultimately, however, the BMF hopes to make its contribution by creating jobs now for the emerging black professional in South Africa in a post-apartheid economy by preparing the future leaders with appropriate skills and a forum for support.

BLACK MANAGEMENT FORUM  
 AGREEMENT 674-0303-G-00-7044-00  
 ILLUSTRATIVE BUDGET  
 (U.S. Dollars)

<u>Line Item</u>	<u>Year One</u>	<u>Year Two</u>	<u>Total</u>
<u>A. Technical Assistance</u>			
1. Survey Specialist	20,000	-0-	20,000
2. Facilitator	10,000	-0-	10,000
3. Management Specialist	10,000	10,000	20,000
4. Fundraising Specialist	10,000		10,000
5. Leadership Development Specialist	15,000	15,000	30,000
<u>B. Training</u>			
1. Executive Retreat	2,000	-0-	2,000
2. Planning Workshops	2,500	2,500	5,000
3. Career and Personal Development Seminars	5,000	5,000	10,000
4. Leadership Development Seminars	5,000	5,000	10,000
<u>C. Travel/Tranportation</u>			
Study Tours	14,000	14,000	28,000
<u>D. Salary/Administrative Costs</u>			
a. Development Specialist	25,000	25,000	50,000
b. Printing/Production Costs	10,000	5,000	15,000
<u>E. Research Activities</u>	25,000	25,000	50,000
<u>F. Commodities</u>	10,000	10,000	20,000
<u>G. Evaluation and Audit</u>	10,000	10,000	20,000
<u>H. TOTALS</u>	173,500	126,500	300,000

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BLACK MANAGEMENT FORUM  
 AGREEMENT 674-0303-G-00-7044-00  
 ILLUSTRATIVE BUDGET  
 (South African Rands)

Line Item	Year One	Year Two	Total
<u>A. Technical Assistance</u>			
1. Survey Specialist	37,000	-0-	37,000
2. Facilitator	18,500	-0-	18,500
2. Management Specialist	18,500	18,500	37,000
3. Fundraising Specialist	18,500		18,500
4. Leadership Development Specialist	27,750	27,750	55,500
<u>B. Training</u>			
1. Executive Retreat	3,700	-0-	3,700
2. Planning Workshops	4,625	4,625	9,250
3. Career and Personal Development Seminars	9,250	9,250	18,500
4. Leadership Development Seminars	9,250	9,250	18,500
<u>C. Travel/Transportation</u>			
Study Tours	25,900	25,900	51,800
<u>D. Salary/Administrative Costs</u>			
a. Development Specialist	46,250	46,250	92,500
b. Printing/Production Costs	18,500	9,250	27,750
<u>E. Research Activities</u>			
	46,250	46,250	92,500
<u>F. Commodities</u>			
	18,500	18,500	37,000
<u>G. Evaluation and Audit</u>			
	18,500	18,500	37,000
<u>H. TOTALS</u>			
	320,975	234,025	555,000

TABLE 2

BLACK MANAGEMENT FORUM  
AGREEMENT 674-0303-G-00-7044-00  
IMPLEMENTATION PLAN

BENCHMARKS	POSSIBLE ACTIVITIES	AID-FUNDED COMPONENTS	TIMING
1. Refine/define organizational roles/priorities	<ul style="list-style-type: none"> <li>a. National and Chapter Directors Retreat</li> <li>b. Membership Survey</li> <li>c. Revise Organizational Prospectus</li> </ul>	<ul style="list-style-type: none"> <li>a. Technical Assistance               <ul style="list-style-type: none"> <li>-Organizational Development Specialist</li> <li>-Media/Production Specialist</li> </ul> </li> <li>b. Funding for Survey</li> <li>c. Funding Retreat Expenses</li> </ul>	Months 1-6
2. Advocacy Program	<ul style="list-style-type: none"> <li>a. Video Production</li> <li>b. Data Collection</li> </ul>	<ul style="list-style-type: none"> <li>a. Administrative Costs</li> <li>b. Survey (as above)</li> </ul>	Months 6-18
3. Expand BMF Infrastructure	<ul style="list-style-type: none"> <li>a. Hire New Staff</li> <li>b. Procure Additional Office Equipment</li> </ul>	<ul style="list-style-type: none"> <li>a. Salary for Development Specialist</li> <li>b. Capital Costs of Equipment (computers, software, etc.)</li> </ul>	Months 6-9
4. Develop Revised Action Plan	<ul style="list-style-type: none"> <li>a. Annual Planning Workshop with National &amp; Chapter leadership</li> <li>b. Conduct Membership Drive</li> <li>c. Develop and implement Fundraising Plan</li> </ul>	<ul style="list-style-type: none"> <li>a. Funding Workshop</li> <li>b. Technical Assistance               <ul style="list-style-type: none"> <li>-Fundraising Specialist</li> <li>-Management Specialist</li> </ul> </li> </ul>	Months 6-18

IMPLEMENTATION PLAN  
(Continued)

BENCHMARKS	POSSIBLE ACTIVITIES	AID-FUNDED COMPONENTS	TIMING
5. Research Program	a. Specific Proposals submitted for consideration	a. Funding as Agreed by BMF Board and USAID	Continuous
6. Reinforce BMF Leadership Capability	a. Study tours to U.S. for Nat'l and Regional Chapter Representatives b. Leadership Seminars c. Career & Personal Development Skills	a. Fund Travel/Transport b. Technical Assistance -Leadership Dev Specialist -Training Specialist c. Fund Awards Banquet d. Fund training costs	Months 6-24

Attachment 4

Annual Budget and Basis for Advance Request  
(South African Rands)

Line-item	Twelve Month Budget				TOTAL
	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	
Technical Assistance	30,062	30,063	30,062	30,063	120,250
Training	6,706	6,706	6,706	6,707	26,825
Travel/Transportation	-0-	12,950	12,950	-0-	25,900
Salaries/Admin Costs	-0-	-0-	16,187	16,188	32,375
Research Activities	-0-	-0-	11,562	11,563	23,125
Commodities	-0-	-0-	4,625	4,625	9,250
Evaluation/Audit	-0-	-0-	-0-	-0-	-0-
<b>TOTAL</b>	<b>36,768</b>	<b>49,719</b>	<b>82,092</b>	<b>69,146</b>	<b>237,725</b>

Initial Advance Request - 59,431 South African Rands

FISCAL DATA

Project Name : South Africa Black Private Enterprise  
Development  
Project Number : 674-0303  
Agreement Number : 674-0303-G-00-7044-00  
Appropriation : 72-1171037  
Budget Plan Code : GESA-87-21674-KG13  
Allowance : 737-50-674-00-69-71  
Reservation Con # : B870220  
Cable Reference : State 300749  
Amount Obligated : \$300,000  
Recipient : Black Management Forum

Draft: DRobertson/PDO;0015C;8/15/87

Clearances: WStickel, AD (draft)  
MJohnson, SPDO (draft)  
CPascual, PROG (draft)  
DKeene, RLA (draft)  
RSolloway, CONT (draft)