

PD-ABK-225  
92572



**Human and Educational Resources Network Support**  
Funded by USAID

PD-ABK-225

**INTERIM EVALUATION  
of the  
TRAINING FOR DEVELOPMENT PROJECT  
of  
USAID/MOROCCO**

**A HERNS Project Report**

**Prepared under contract FAO-0071-I-00-3070-00**

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**July 1994**

## EXECUTIVE SUMMARY

### **Project goals**

**Goal and Purpose.** The Goal of the Training for Development project is " to remove human resources constraints to the development of open markets in Morocco." The Purpose is " to strengthen Morocco's in-country training capacity and to improve Moroccan managerial and technical skills for economic development and private sector expansion."

We find that, in general, the project is being implemented according to the design of the Project Paper. Within each of its two major components, however, activities have led to important shifts in strategy that have design and management implications.

**Component 1.** In Component 1 (infrastructure-strengthening ), the project activities are shifting toward a sharper focus on institutional development. We have traced this shift through an analysis of key planning documents. We find the project design and strategy in Component 1 are sound, especially as they have come into sharper focus with the selection of institutional partners. We recommend that the project maintain this focus and concentrate on technical assistance to the partners in developing their curricula and faculties, managing their organizations, and marketing their programs.

We also recommend that some activities that were originally planned to be implemented outside of activities with partner institutions be brought into the new focus and become the responsibility of partner institutions, given technical and material assistance from AmidEast. These activities include sector studies and follow-on with U.S. training participants. Finally in Component 1, we recommend that AmidEast carry out most awareness-raising activities and policy dialogue activities outside of the focus on partner institutions, and that these activities be better clarified and operationalized.

To ascertain how far along the project has moved toward its goals, we compared the data on quantifiable goals for the project with those on its accomplishments to date. These data show that many activities have not yet begun and others have only started. The main cause of delay is that AmidEast had to spend about eight months in selecting 14 partner institutions. It will begin providing them with technical assistance only in mid-1994.

**Component 2.** In Component 1 (U.S. training component ), we find that the project is not moving toward its goals. Masters-degree training in the United States is not attractive to private sector enterprises, It is not perceived by either individuals or enterprises as providing benefits worth the costs. Short-term training in the United States, as currently designed, is not likely to have an impact on the private sector. Short-term training is not leading to core groups of trained individuals because it is spread thinly over sectors and among institutions and enterprises. Neither targets for private sector or women are being met.

We therefore recommend that U.S.-based masters-degree training be replaced with equivalent programs in some of the 14 partner institutions. We also recommend that U.S. short-term training for mid-level cadres be packaged in programs and courses within the 14 partner institutions and that most of it be tailored to their needs rather than off-the-shelf. Finally, we recommend that individuals at high levels in the training industry and in selected sectors receive exposure to their counterpart industries in the United States through customized study tours and invitations to relevant conferences and other such events. This reorientation of U.S. short-term training will eliminate the need for competitive selection of candidates and ensure that individuals in leadership roles participate. AmidEast has planned one such study tour and should begin planning now for the second.

### **Project structure and coordination**

**Situating the project within organizations.** Given the shift in emphasis from participant training to in-country training development, the decision to situate the project within the Direction de la Formation des Cadres (DFC) and the Population and Human Resources Office (PHR) at the U.S. Agency for International Development in Morocco (USAID/M) appears to be a legitimate subject of discussion. The need to plan for development impact leads us to believe that the traditional offices skilled in managing participant training are not necessarily the best ones to support private sector development and a particular industry within it. Both USAID/M and the GOM administration housing DFC are considering reorganizations, the latter creating a *Service* dealing with private sector activities in *formation continue*. We believe this and the Private Sector Office within USAID/M deserve consideration as appropriate "houses" as the Project makes its shift in focus.

**Roles vs. tasks** In principle, the structure of the project appears sound. Project documents lay out a comprehensive set of roles and corresponding tasks for each of the main parties (USAID/M, DFC, AmidEast, and the Joint Advisory and Selection Committee--JASC). However, activities and tasks in some cases have not matched the level of the responsibility stated in these documents .

**Authority for decision-making**, seemingly clear in the project documents, poses a major difficulty to the project's three-part management and implementation structure. Management cultures and styles, assumptions about how and when to share information, and a live memory of early contractor errors contribute to DFC's view that the U.S. counterparts are not transparent, and to the U.S. view that AmidEast is providing too much information that is not being effectively used. Further, the contractor feels constrained and unable to operate efficiently with private sector entities.

In our view, top project management needs to stay away from the details, and allow both mid- and lower-level project staff to carry out day-to-day project activities. This can be helped by better organization of and respect for regular meetings. One meeting per week of project managers is sufficient. Meetings between top USAID/M and DFC managers and JASC members should be limited to quarterly meetings to address quarterly report results, approve workplans, and address overall progress toward project impact. Junior staff at both USAID/M and DFC need to be given the authority to work together on staff support. AmidEast needs to continue making its reports

shorter, tighter and more visual, and to refrain from submitting bits and pieces to either DFC or USAID/M.

USAID/M needs to be more directive in managing how decisions are made. Its staff has more experience in projects supporting private sector development and more management experience than does DFC. The TFD project is more complex than a participant training project and requires much more flexibility for the contractor than DFC is used to permitting. We suggest that USAID/M consider additional training or organizational development interventions to help DFC improve its management efficiency.

**The JASC.** The "joint" role of the JASC has been both to participate in the selection of long-term candidates for U.S. training and to advise on project policy and direction. We believe that the role of the JASC should be an advisory one only, not concerned with trainee selection. Despite concern for "transparency" in participant selection, this is a poor use of JASC member skills, especially the non AID, DFC members.

**Changes in administrative responsibilities** Finally, given the shift in emphasis of the project from participant training to local institutional development, tasks in processing participant trainees can be shifted accordingly. We believe that the bulk of the marketing of courses and preparation of dossiers can be shifted from AmidEast staff to the partner institutions through which U.S. training will be channelled. Most importantly, the institutions will be largely responsible for the up-front training needs analysis, training plan preparation (including impact indicators) and planning for follow-up, which currently is not done.

We recommend that the **maintenance of PTMS** be shifted back to the Mission, which not only will have fewer trainees to process (at least long-term) but will have easier access to PTMS support and, in the final analysis, more direct reason to maintain the system, which was designed for Mission use.

## **Project management**

**Highlights.** We find that, overall, the project has been well managed by USAID/M and AmidEast. Although there have been significant delays in scheduled activities, these are generally due to interorganizational structural and communication problems rather than to internal management inefficiency. In the case of DFC, project management appears to be less efficient.

AmidEast managed the selection of partner institutions well, resulting in a group of 14 partners that, with assistance from the project, should sustain the benefits of the project. Short of conducting a management audit, we observed that the contractor is within budget and has kept good records of progress, inputs, and outputs.

**Needed improvements.** Yet, we find there is room for improvement in the management of each party. AmidEast needs to improve its style of communication with the Mission and, even more so,

with the DFC. USAID/M needs to set training objectives and take action in preparing the staff of the Training Department to carry out its role in the major shift from training in the United States to in-country training. DFC needs to learn to delegate responsibilities and participate in rational decision-making processes.

**Staffing increase.** We support the augmentation of staff being proposed by AmidEast. With the simultaneous commencement of technical and material assistance to 14 institutions, at least two full-time training specialists and two assistants should be on the staff. They should be brought on as soon as possible, and the option of keeping them throughout the term of AmidEast's contract should be left open.

**Workplan.** Finally, we think AmidEast's 1994-95 Workplan is ambitious. It depends on the expeditious hiring of many consultants. It must be implemented during the coming months without the benefit of the proposed additional staff. It assumes that DFC and USAID/M will not continue to require approvals for every minor decision and task. We recommend that the workplan be reviewed and adjusted in January 1995, and that, above all, speed and quantity not be allowed to take precedence over quality.

## Indicators

**Progress indicators.** In general, USAID/M's contract with AmidEast expresses clear targets for global project outputs such as trainees, studies, workshops, or partnerships. But emphasis is placed on contractor activity rather than on progress towards outputs and EOPS. It is unclear whether USAID/M expected the contractor to identify benchmarks and indicators at project start-up.

As such, project partners (USAID/M, AmidEast, and DFC) have considerable freedom to define the meaning of contractor performance standards expressed in the contract as "training adapted to private sector demands" or "a dynamic returnee activity program developed and ongoing." AmidEast's annual workplans are much more specific than the contract in terms of periodic, quantitative targets for trainees, studies and the like, and offer more information on sectors to be targeted.

In terms of indicators for the progress of counterpart institutions, partners' plans are expressed as annual workplans, not as "training plans" per se. As such, they do not specify training objectives or performance objectives. However, the diagnostic studies performed for each institution linked each training activity (workshop, study tour, equipment and so on) to a specific objective, for example, "to reinforce X's efforts to establish a training consulting division." The aggregate workplans approved in July 1994 do not explicitly re-state these objectives, though they are the underlying basis for the annual set of actions organized in favor of the partners.

**Impact Indicators.** Indicators should be developed at the Project Purpose level, stemming from the EOPS. They should reflect impact at the level of individual trainees, partner training institutions, and the training sector. The training institutions themselves should be identifying impact indicators at the

**individual level.** For U.S. training channelled through the partner institutions, TFD must make its expectations clear that the partner is responsible for analyzing training needs, developing detailed training objectives and impact indicators to be tracked. The project should continually refer back to the workplans developed for each of the 14 partners in the diagnostic studies. These contain a good basis for creating indicators of impact at the **institutional level**. To develop indicators of impact at the **sector level**, the project should conduct a study of best practices, or benchmarks, in the professional training industry in the United States and other industrialized countries.

A recapitulation of key recommendations is provided at the end of the report.

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## INTRODUCTION

### Background

The Training for Development (TFD) project in Morocco comprises two components of training activities:

- **Component 1:** A set of activities new to the U.S. Agency for International Development in Morocco (USAID/M) designed to strengthen the training infrastructure in Morocco, permitting the gradual replacement of training in the United States with training in Morocco. Based on a market-driven model, these activities address both the *demand* for training, through marketing and awareness-raising activities, and the *supply* of training, through strengthening institutions in Morocco, including private and public institutions that provide *formation continue* (continuing education), and, to a lesser extent, private consulting firms and professional associations.
- **Component 2:** Traditional participant training activities in which Moroccans who have completed a baccalaureate degree are sent to the United States for masters-degree or short-term programs. The new elements in the TFD project are, first, that, on average, 60 percent of participants come from enterprises in the private sector rather than ministries in the public sector; second, that private sector candidates are selected on a competitive basis rather than nominated by ministries; and, third, that the recruitment, selection, and processing of private-sector candidates is handled by a contractor, not the mission.

These two components are designed to complement each other in a project with a common goal and purpose (see Table 1).

Table 1. Project design elements in the Logical Framework

<b>Goal</b>	To remove human resources constraints to the development of open markets in Morocco
<b>Purpose</b>	To strengthen Morocco's in-country training capacity and to improve Moroccan managerial and technical skills for economic development and private sector expansion.

<b>EOPS</b>	<p>Improved quality and capacity of in-country training infrastructure to meet market demands related to human resource development for economic growth and private sector expansion</p> <p>Core of more appropriately trained private and public sector personnel to participate in Morocco's economic development.</p> <p>Favorable policy environment that promotes policies, procedures, and standards of training related to the growth, financial viability, and quality of private sector training.</p>
<b>Outputs</b>	<p>Training institutions with improved institutional management, curricula, training materials, and faculty that are adapted to market demand</p> <p>Linkages between Moroccan and U.S. training and professional institutions</p> <p>Increased awareness on the part of private and public employers regarding benefits of human resources development</p> <p>Research data leading to course development and policy revisions in accreditation, equivalency, and quality standards</p> <p>Improved capabilities of Moroccan managers and technical experts in fields needed for Morocco's economic growth.</p>
<b>Inputs</b>	<p>Technical assistance</p> <p>Training</p> <ul style="list-style-type: none"> <li>In-country</li> <li>Long-term U.S.</li> <li>Short-term U.S.</li> <li>English language</li> </ul> <p>Commodities</p> <p>Local costs</p> <p>Project management</p> <p>Evaluation, audit and impact studies</p> <p>Linkages</p> <p>Contingency</p>

The project was designed in 1991 and 1992, and the Project Paper was signed in August 1992. The *Direction de la Formation des Cadres* (DFC) within the Ministry of Public Works is the bilateral counterpart institution, and Ami-East, situated in Casablanca, is the contractor that implements the project. Within USAID/M, the project is managed by the Training Office, which is in the Division of Population and Human Resources.

The Project Paper calls for an in-house interim evaluation after two years "to examine the project's mobilization efficiency as well as to identify and address issues."

### **Evaluators' scope of work**

The scope of work for the evaluation (see Attachment 4) was prepared by the project liaison officer from the Office of International Training and the training specialist from the HERNS project, both from Washington, D.C. They spent a week in Morocco in May 1994 consulting with the mission and AmidEast.

The scope of work calls for the evaluators to "focus on the status of the project to date vis-a-vis projected outputs," examining both the design and implementation of the project. The team should..."validate the current course of project design and implementation strategy and make recommendations regarding any mid-course corrections if necessary."

Specifically, the evaluators are to address:

**Project goals:** Under the current design, will the project achieve its targets and/or goals? Will the overall project design lead to sustainable economic development and private sector expansion?

**Project structure and coordination:** Is the project structured in a manner that is leading to the achievement of project goals?

**Project management/implementation:** Is the basic management of the project appropriate to achieving project goals?

**Design for impact:** Are appropriate benchmarks, indicators, and follow-on activities present in the project design and implementation plans?

### **Methodology**

Following the guidance of the scope of work, our methodology included:

Interviewing all project staff in Morocco, selected Joint Advisory and Selection Committee (JASC) members, and representatives from AmidEast/Washington staff and from Partners for International Education and Training (PIET)

Reviewing project documents

Analyzing data

**Sharing findings in oral presentations to USAID/M, AmidEast, and DFC**

**Preparing this written report.**

Our intent, as well as the mission's, was to reach conclusions and recommendations that all parties could agree upon and strive to implement.

We worked as a two-person team, and kept in close touch with the project staff in USAID/M. We debriefed different parties periodically (USAID/M four times, AmidEast twice, and the DFC once). Before leaving Morocco, we left an executive summary and detailed outline of this report. We shared a draft version of the full report, by e-mail, within a week of returning to Washington. A list of individuals interviewed and a list of documentation reviewed are presented in Attachments 1 and 2.

### **Organization of the report**

The report has four parts that correspond to the four main questions of the scope of work: project goals, project structure, project management, and progress and impact indicators. In each section, we first report findings, followed by conclusions and recommendations. In a final section, we summarize our recommendations.

## PROJECT GOALS

In this section, we are addressing the question: *Under the current design, will the project achieve its goals?* To do so, we have charted key planning documents in order to determine the extent to which the project has stayed on course and the points at which it has either narrowed or broadened its focus (see Tables 3 and 4). We have also examined the activities that have taken place so far and are planned in the coming year alongside the activities prescribed in the Project Paper (see Table 5). Based on these data and on what we have learned from interviews and other project documents, we have drawn our conclusions about the likelihood of the projects' achieving its goals under the current design.

### Findings

**Project functions.** As noted in the introduction, the project was designed as two components:

- Component 1: Strengthening the training infrastructure in Morocco, and
- Component 2: Providing long-term (masters degree) and short-term training in the United States.

Each of these components, in turn, was broken down into four subcomponents (see Table 2).

Table 2. Project components and subcomponents

<b>Component 1: Strengthen in-country training infrastructure</b>	<b>Component 2: Improvement of Moroccan managerial and technical capability</b>
Adapting and marketing training to private sector demands	Tuition support for short-term management and technical training in Morocco
Technical assistance to in-country training institutions	Short-term management and technical training in the US
Linkages between US and Moroccan institutions	Graduate-level training in the US
Elevating the status of HRD in Morocco	English language training

The project components and subcomponents were categorized in this manner for the purposes of budgeting: those in the first column are in the contractor's budget, and those in the second column

are in USAID/M's budget. But in functional terms, they are grouped somewhat differently. Namely, tuition support for training in Morocco (second column) is a function of technical assistance to in-country training institutions (first column). English language training (in the second column) serves both to prepare participants for training in the United States (second column) and to strengthen in-country training institutions (first column). The two cells in Component 2 that belong functionally in Component 1 are highlighted.

The distinction between the budgeting and the functional division of components is important for several reasons. First, it indicates that while USAID/M is largely responsible for the training components, and AmidEast is largely responsible for the infrastructure-strengthening component, the two are functionally intertwined. Second, it reveals that responsibility for the project's success rests on close cooperation between USAID/M and AmidEast--more so even than the conventional manager-implementer relationship. Third, it forewarns that adjustments to project activities are likely to imply shifts of funds between USAID/M and AmidEast.

In our presentation of the data, we place tuition support for in-country training and English language training where it functionally belongs--in the infrastructure-strengthening component, not the training component. The latter we limit to U.S.-based training, both long-term and short-term.

**Shifts in project direction.** We wanted to find out if activities in these project components and subcomponents are on track. That is, reserving the question of how far down the road toward its goals in each subcomponent the project has gone, is it still moving down the same road as envisioned? We divide our analysis into Components 1 and 2, including in Component 1 all in-country training activities.

### **Component 1. Strengthening the in-country training infrastructure**

For the purpose of analyzing changes in direction in Component 1, we structured Table 3, which shows the recommended or planned course of action in each of five key project documents.

The categories in Table 3 (Table 3a, Table 3b, etc.) are derived from the subcomponents in the Project Paper. The other key documents reviewed in each of these categories are

- The study of private sector training needs in Morocco prepared by Ernst & Young as a preliminary step toward designing the project
- The 1993 workplan submitted by AmidEast in July 1993
- The report of an AmidEast consultant, Richard Roughton, in which he synthesizes the findings from the 14 diagnostic studies of training institutions and recommends a course of action with them

- The 1994-95 workplan submitted by AmidEast in July 1994.

**Note that the last three documents are concerned only with AmidEast's responsibilities and therefore do not touch on training in the United States.**

Table 3a. Adapting and marketing training to private sector demands.

Sector study	1993 AE workplan	Roughton synthesis	1994 AE workplan
<p>On-going identification of private sector training needs:</p> <p>Create an advisory board to direct private sector training initiatives</p> <p>Conduct sector-specific workshops to involve the private sector in identifying training needs</p> <p>Commission diagnostic studies to examine problems facing private sector firms; incorporate findings in dialogue with the private sector and the design of training programs.</p> <p>Collect, analyze, and disseminate information related to private sector training needs.</p> <p>Develop mechanisms to obtain feedback from the private sector on USAID-financed training initiatives.</p>	<p>Marketing training opportunities in the US</p> <p>Synthesis report on training needs in the private sector</p> <p>Seminar interventions to bring partners in contact with private sector representatives</p>	<p>Marketing:</p> <p>Help training institutions assess the market and develop their own market niches</p>	<p>Management study tour and linkages visits</p> <p>Workshop on marketing adult ed and training programs</p> <p>Periodic TFD "bulletin"</p>

Table 3a reveals that while marketing has remained a strong component in project strategy and planning, the responsibility for market studies and marketing activities has shifted from the TFD project staff to the training institutions. The basis for this shift, as explained in the Roughton synthesis report, is that training institutions are in the habit of relying on the government to "actively influence and manage demand." They need assistance in learning to do this themselves.

Table 3b. Technical assistance to in-country training institutions

Sector study	1993 AE workplan	Roughton report	1994-95 AE workplan
<p>Strengthen in-country training capacity:</p> <p>Strengthen local institutions' ability to assess private sector training needs</p> <p>Support the development of curricula and course materials to target private sector training needs</p> <p>Strengthen the pedagogical and technical skills of educators and trainers within private sector oriented training institutions.</p>	<p>Selection of 10 core partner institutions</p>	<p>Management and strategic planning</p> <p>Program (curriculum) development</p> <p>Faculty development (TOT)</p> <p>Equipment and technical aids</p> <p>Library</p> <p>Evaluation and reengineering</p>	<p><b>Primary assistance to 14 partners:</b></p> <p>Workshop on preparing workplans</p> <p>Management study tour and linkages visits</p> <p>Material assistance (e-mail)</p> <p>Workshop on TOT and faculty development</p> <p>ELT equipment purchases and tuition support in existing courses</p> <p><b>Individual assistance to 14 partners:</b></p> <p>Curriculum design</p> <p>Design m&amp;e instruments</p> <p>Library and software</p> <p>TA in TOT</p>

Table 3b reveals that, over time, institutional strengthening activities have received much more detailed attention. The selection of partner institutions took about eight months (August 1993 through June 1994) during which their needs for assistance were carefully diagnosed and their assistance packages negotiated.

Note that the 1994-95 workplan has activities listed under "primary" assistance and under "individual" assistance. The former are workshops to be held for the participants who have expressed interest in these areas; each workshop will be followed by in-house consulting with the institutions that sent representatives to the workshop. The latter are activities that respond to particular requests for assistance from only one institution.

Table 3c. Linkages between U.S. and Moroccan institutions

Sector study	1993 AE workplan	Roughton report	1994-95 AE workplan
Establish mechanisms to foster linkages between the Moroccan educational and training sector and the business sector			Management study tour and linkages visits  Visits from US institutions for purpose of establishing linkages

The 1993 AmidEast workplan did not specify activities to develop linkages. Roughton proposed two study tours by leaders of the partner institutions for purposes of exposing them to U.S. marketing and training techniques.

Also, the Project Paper designated, as the mechanism for linkages, participation in the centrally funded University Linkages Development project (ULDP). The mission decided to drop this mechanism when it became clear that the ULDP would leave the TFD project no control over the programming and strategy for developing linkages. Subsequently, four Moroccan training institutions competed with institutions worldwide for inclusion in the ULDP, but they were not accepted. As a result, the mission decided to adopt instead the mechanism of helping some of the 14 partners to develop linkages with U.S. institutions, without participating in the ULDP. This strategy has been translated into an activity of AmidEast's 1994-95 workplan.

Table 3d. Elevating the status of human resources development (HRD) in Morocco

Sector study	1993 AE workplan	Roughton report	1994-95 AE workplan
	Synthesis report on training needs in the private sector  Seminar interventions to bring partners in contact with private sector representatives		Plan and implement "events" in collaboration with partners  Periodic TFD "bulletin"  Liaison with professional associations such as AGEF  Five forums to build private-sector awareness of TFD

Table 3d shows that raising awareness of the value of human resources development was outside the purview of the sector study and that it was not directly addressed in the Roughton report. Moreover, both of the activities in the 1993 workplan and the first two of four activities in the 1994 workplan also fall under the rubric of "marketing" (see Table 3a). This indicates that, while

awareness-raising activities are still part of the project's strategy, they have been significantly merged with marketing activities.

**Table 3e. Tuition support for short-term management and technical training in Morocco**

Sector study	1993 AE workplan	Roughton report	1994-95 AE workplan
			Support development of new courses with TA and tuition subsidies

Probably because it is viewed as simply a financing mechanism, none of the strategy and planning documents have specified providing tuition support for in-country training until the 1994-95 workplan. In the Project Paper, tuition support takes the form of a budget line item based on 4,800 bourses. The Project Paper states that these funds will be used to help training institutions (not only those targeted for technical assistance) to offer courses based on the assessments of training needs. "The project will 'buy down' tuition costs of sponsored individuals, thus assuring adequate attendance to cover costs and making the average tuition fee required for the course attractive to a wider clientele." Those eligible for bourses are senior cadres and decision-makers and mid-level private and public sector employees or promising new graduates entering the private sector...." The project is to determine the precise institutions, courses, and individuals who receive support.

**Table 3f. English-language training**

Sector study	1993 AE workplan	Roughton report	1994-95 AE workplan
		ELT for "key players" at the 14 partner institutions	ELT equipment purchases and tuition support in available courses  Workshop on ELT methods

The English-language training activities and budget items specified in the Project Paper are complex. They provide for

- Training English-language trainers within the 14 partner institutions to improve their skills in teaching business English
- Long-term intensive training for masters candidates and short-term refresher or survival training for short-term candidates prior to their departing for U.S. training
- Training for Moroccan counterparts in both the TFD and other USAID projects.

Only the first of these three activities are in the AmidEast budget, even though both the U.S. training participants are recruited, selected, and programmed by AmidEast.

Based on the diagnostic studies of the 14 partner institutions, Roughton concluded that English-language training of the leadership and key faculty at those institution is essential for their ability to take full advantage of the project's resources and should be a high priority of the project.

The 1994-95 workplan includes strengthening the English-language programs of those partner institutions that request such assistance by giving them equipment and technical assistance in staff development.

### **Summary of Component 1**

In summary, Table 3 confirms that, with some exceptions, the project has followed through in its strategic planning activities with the direction set in the Project Paper. There are, however, some notable shifts in direction.

First, staff time and effort have become more focused on strengthening selected in-country training institutions. Although institutional development was clearly envisioned in the Project Paper, the amount of time and effort devoted to selecting those institutions and planning for their participation goes far beyond what the Project Paper anticipated. The 1993 workplan, for example, was consumed by the process of selecting these institutions. Also, the activities of linkages, marketing, and tuition support are now concentrated in the relationships with the partners.

It is important to note that this shift has resulted from several events:

- The Project Paper called for a competitive selection of partner institutions. The Mission and AmidEast took this seriously and established a formal selection process entailing an RFP. Forty-four institutions responded, from among which the JASC (see below) selected 14 for further assessment. Based on a thorough, three-month long assessment of these 14, the mission and AmidEast recommended ten; the project's counterpart agency (the DFC), however, decided to accept all 14 institutions.
- In addition, the project managers decided to begin support for these 14 simultaneously, rather than gradually, as the initial plan had outlined.
- While the sector study recommendations and the Project Paper direction called for the contractor's staff to implement some of the marketing and awareness-raising activities outside of the 14 partners, Roughton, based on the diagnostic studies, recommended that these become more closely aligned with assistance to the partners.

- The decision not to participate in the University Linkages Development project led the project managers to redirect this activity to one of assistance by the contractor in helping the partners develop their own linkages.
- The difficulty in recruiting candidates from the private sector to participate in masters-degree training in the United States (a significant finding, which we will discuss in more detail further on) has led to the decision to help build in four of the partner institutions in-country masters-degree programs that are equivalent to U.S.-based programs.

These, then, are the shifts that we have found to occur in the infrastructure-strengthening component of the project, which--to repeat--is largely following the design of the Project Paper. We will now turn to the U.S. training subcomponents.

### **Component 2: Long-term and short-term participant training in the United States**

Like those in the infrastructure-strengthening component, the goals of the participant-training component have not changed from those stated in the Project Paper, either in substance or in number. These goals are presented in Table 4.

**Table 4a. Targets for training participants in the United States**

Planned numbers of U.S. training participants				
	# over LOP	Average # annually	% who are private sector	% who are women
Masters	120	15	50	30
Executive certificate	120	15	50	30
Short-term	420	52.5	60	30
Study tours, conferences	130	16.6	80	30

Table 4b presents the number of individuals actually in the process of being trained.

**Table 4b. Actual numbers of training participants programmed**

Actual numbers of U.S. training participants (as of July 1, 1994)				
	Target	Number	% who are private sector	% who are women
Masters	30	15	33	13
Executive certificate	30	0	-	-
Short-term	52.2	55	27	40
Study tours, conferences	35	20	?	?

We derived these numbers from AmidEast's 1993 Annual Report and its records of participants programmed subsequent to that report. While the long-term program has an elapsed time of two years (1992-94), the short-term program has an elapsed time of only one-year because prior to Fall 1993 short-term trainees were supported by funds left over from the participant-training project that preceded the TFD project.

Tables 4a and 4b reveal that, with the exception of short-term training, the project has not met its targets to date, either in terms of actual numbers of trainees, or in percentages of private sector trainees and women trainees.

- Short-term participant numbers are on target. Forty percent of short-term trainee candidates have been women, although, we were told, latest rounds of selection have not met the targets for women. Private sector candidates constitute 27 percent, far short of the 60 percent target.
- Only 15 masters-degree candidates have been programmed. A group of seven has completed its first year in the United States, and a group of eight will depart in September. Women candidates comprise 13 percent (not the targeted 30 percent), and private sector candidates 33 percent (not 50 percent).

According to the PIR, the TFD project has had difficulty meeting the requirement to send at least 10 percent of participant trainees to Historically Black Colleges and Universities. Five short-term trainees have attended courses at these schools, but the two long-term candidates placed in Fall 1993 at these schools were transferred to other schools at their request.

**Summary of project accomplishments to date.** The next set of data that we will summarize answers the question: how far along toward its goals has this strategy taken the project?

Table 5 presents a summary comparison of quantifiable actions--planned and accomplished.

Table 5. Quantified project targets and accomplishments to date

Comparison of planned and accomplished actions			
Component 1: Strengthening Moroccan In-Country Training Capacity			
		LOP	To 7/94
Adapt and Market Training to Private Sector Demands	Sectoral assessments of training needs	20	1
	Marketing program created		1/94(1)
	Organize workshops, round tables for private enterprises and training institutions	20	5(2)
	Formal/informal surveys on training institutions	10	18(3)
Technical Assistance to Local Training Institutions	Local partner institutions chosen		3/94
	Technical assistance in curriculum design (courses created; see also tuition support)	50	(Fall 1994)
	Limited procurement of computers and equipment	\$300k(4)	(Fall 1994)
	ST & LT training for partner institution staffs		4-5 people
	Commercial English training strengthened		(Fall 1994)
Fostering Linkages with Moroccan & US Institutions	Formal linkages developed	4	
	Material Support for DFC Resource Center	\$100k	\$90k(5)
Elevating the Status of HRD in Morocco	Short term observation/study tours for private sector leaders in HRD		(Aug 1994)
Component 2: Improve Moroccan Management & Technical Skills			
	PTMS installed and running	9/93	9/93(6)
Short-Term In-Country Training	Tuition support grants for participation in new in-country courses offered by partner institutions	4,800	
Short-Term US & Third-Country Training	Off-the-shelf course attendance	420	55
	Participants in observation/study tours, conferences, etc.	130	20
	Follow-on program created	12/93	(7)
Long-Term US Training	Two-year Masters programs	120	15
	One-year Executive Masters programs	120	
English-Language Training	USAID Counterparts (outside of the TFD project)	1800	100
	TFD-sponsored participant trainees	400	23
	TOT/etc. for ELT Instructors in partner institutions	100	(in progress)

The numbers in parentheses indicate that they are discussed on the following page.

(1) AmidEast attempted to launch a marketing program to advertise training opportunities offered by project. Their efforts met with resistance from the DFC (which we discuss below) and were not successful in recruiting enough masters degree candidates (a problem we will also discuss below). As part of its marketing strategy, AmidEast hired consultants to produce a "synthesis" report on the status of training in the private sector. The intent of this report was to foster dialogue within the private sector about training needs and the value of human resources development, but the DFC has not yet allowed the report to be released.

(2) The AmidEast staff, working with two consultants, presented three workshops around the country on assessing training needs. A total of 84 representatives from training institutions and private sector enterprises attended these workshops. The staff has also presented two other workshops, one to help the 14 partners write workplans and the other to help the three managing parties to improve communication among themselves. In addition, AmidEast staff have attended many events sponsored within the private sector, which has helped them begin networking and establishing a presence within the sector.

(3) The 14 partner institutions actually entail 18 organizations, since one is a consortium of two organizations and another has four sites around the country

(4) As part of its 1994-95 workplan, the project will give each of the 14 partners a package of assistance that includes computer hardware and software they need to communicate by e-mail.

(5) The project is supplying the DFC with computer equipment for its information center. This will make available to Moroccans who come to the center in search of professional study opportunities access to computerized information services.

(6) The PTMS has been installed at AmidEast, but it is still not running without bugs and has not yet been used to produce reports.

(7) We make a distinction between follow-on activities that strengthen the human resources development *infrastructure* and those that link *individual* training to job performance. AmidEast has conducted an infrastructure follow-on activity: it has created a directory of alumni from U.S. colleges and universities. Neither AmidEast nor USAID/M have developed a system of individual follow-on activities.

A glance at Table 5 shows that many activities of Component 1 have not yet begun, many others have only started. In Component 2, as we have discussed, short-term training numbers are on target, while long-term training numbers are behind. Targeted percentages of private sector participants are not being met, nor are those of women in long-term training.

The process of selecting and programming short-term candidates has gone well. During the first two years of the Training for Development project (September 1991 to September 1993), the mission was programming funds left over from the previous participant training project. The selection process that involves AmidEast as well as USAID/M and the DFC was initiated during those two years.

## **Conclusions and recommendations**

**Fit of the project Goal and Purpose in the revised USAID/Washington policy directions.** Before moving to conclusions about the effectiveness of the project design and strategy for reaching project goals, we will move back one level to re-examine the project Goal and Purpose in light of revised USAID/W policy. Since the conception and approval of this project, AID/Washington has issued new guidelines that projects shall aim toward alleviating poverty by focusing on direct assistance to those people who are experiencing poverty. Thus, projects such as Training for Development, that are aimed toward strengthening the private sector, may no longer be justifiable.

USAID/M has prepared an analysis of the fit between mission strategic objectives and agency strategy. In that analysis, this project is viewed in light of new directions. It has ascertained that the project will contribute to the alleviation of poverty by creating more jobs and thus reducing unemployment.

- The market for business skills training, vitally needed if Morocco is to improve its product development and marketing capacities, is flawed by the absence of certification and diploma equivalency systems which place public sector institutions at an unfair advantage over new private sector institutions....
- Human resources investment is required if Morocco is to maintain competitive industry and agriculture and develop needed management and marketing skills. The Training for Development project is aimed at developing the institutions and market for these marketing and management skills. (Memo to senior staff from M. Krackiewicz, June 14, 1994)

We agree that the project is in line with the new directions and that it will help to alleviate poverty by creating more jobs within the private-sector industries served by the project.

**Component 1: Strengthening the training infrastructure.** The project design for this component, with the shift in strategy that has already occurred and some additional shifts that we will recommend, still appears to be an effective means of reaching project goals.

- First, it is focused on a group of carefully selected training institutions that were viable before they joined in partnership with the project and thus are more likely to sustain the

benefits they receive from the project than if they were founded by USAID/M. The process of selecting partners, although it consumed considerable time and effort, has given the project a much clearer focus than that of the original project design. USAID/M, AmidEast, and the DFC all appear enthusiastic about the choice of partners.

- We believe that this focused strategy is more effective than one which targets a broader audience of either institutions or individuals, because it allows the limited resources of the project to be concentrated on producing high-quality institutions rather than spreading them thinly without the ability to persist, guide, and foster the appropriate changes in individuals' skills and attitudes.
- Second, the market-driven strategy of the project will help the 14 partners become better able to respond on an ongoing basis to the dynamic changes of training needs in the private sector. A key activity of the strategy is helping the partners to assess market demand and respond to it with the programs and courses they offer. As the Roughton report pointed out, these institutions must be weaned from a dependence on either the government or the project for ascertaining the market demand for training in the sectors they serve.
- Third, because their durability will depend on their ability to meet market demands for training, they must provide training that demonstrates improvements in job performance. The activities prescribed in the Project Paper, which are incorporated in the current workplan of AmidEast, should develop that ability. Following the direction of the Project Paper, they are curriculum development, faculty (trainer) training, and organizational management.

### **Recommendations on overall design**

Thus, we recommend that the project continue to focus on strengthening the capacity of each of the 14 partners to provide training that improves job performance. We support plans for activities help the partners develop high-quality programs and courses that are responsive to private-sector needs:

- Curricula that link specific managerial and technical skills to job performance
- Faculty and in-house trainers who understand and use effective methods for teaching adults in the context of their work experience
- Principles and skills of managing a training organization--which differ in some important respects from the skills needed to manage other kinds of organizations
- Tools and skills needed to monitor continually the training needs of the private sector and to respond to those needs

- **Material support that includes library materials and software selected for the immediate needs of each partner.**

### **Recommendations on activities within the main focus**

Some activities that were not envisioned in the Project Paper as necessarily linked to in-country training development have since begun to move further into this focus: masters-degree training, university linkages, marketing of training services, tuition support, and English-language training. We recommend that this trend be reinforced.

- **Masters-degree training.** The Project Paper envisioned that during the years in which local training institutions were being strengthened (Component 1), 240 masters-degree candidates would be trained in the United States (Component 2). But while the demand in the private sector for U.S.-based training is weak (see below), the requests from four partner institutions for help in offering masters-degree programs is strong. Thus, the project will accelerate its assistance to these programs as a means of strengthening the private-sector training industry. We support this decision with certain caveats:

First, in keeping with the principle that training institutions assess specific demand for *formation continue*, they should collect empirical data to assess the value of a masters degree, especially one that purports to be "U.S. equivalent" to enterprises. How much of the perceived value of masters degrees among enterprises is related to experience in the United States or to prestigious schools? What do they perceive as the skills and knowledge that masters-degree holders bring to them? In-country masters-degree programs must be tailored to these perceived values.

Second, the project should help training institutions explore and define alternative models that include internships, distance learning, and other teaching methods that capitalize on U.S. expertise.

Third, if these programs are featured as "U.S. equivalent," they should include significant activities, such as internships and research projects, within the United States and with U.S. faculty in Morocco. Training that takes place within the United States should be limited to that which is *best done* there and exclude that which can be done as well in Morocco.

Finally, they should aim in every aspect toward quality more so than quantity. The heavy investment in such programs should result in both a real and a perceived value for those who attend and the enterprises in which they work.

- **Linkages with U.S. institutions.** In addition to short-term study tours, conferences, and faculty exchanges, the Project Paper relied on the centrally funded University Linkages

Development Project to establish and sustain linkages between Moroccan and U.S. institutions. With the loss of interest in that project, USAID/M and AmidEast have taken steps to help establish or foster--in the cases where they already exist--linkages directly between some of the partners and U.S. institutions. The study tour by key staff from partner institutions to take place in August 1994 has as one of its main objectives the beginnings of these linkages. We support this move and offer some specific recommendations:

The U.S. institutions should be carefully selected on the basis of their similarity in the market-driven character of Moroccan programs, the quality of their services and management. Prestigious schools are less likely to be relevant than community colleges and other institutions that serve the immediate market at a reasonable cost.

Non-academic organizations in Morocco, such as management consulting firms, often use the skills and knowledge needed by the partner institutions, and some have training programs. For example, a U.S. accounting firm (Price Waterhouse ?) has a regional training center in Morocco. These kinds of linkages should also be explored.

Fostering linkages requires time and persistence. Responsibility for working with the partner institutions in this activity should be assigned to specific AmidEast staff members, both within the TFD project and in headquarters.

- **Marketing.** The subcomponent aimed at marketing training opportunities has been troublesome. We think there are several explanations for this, and we offer some hypotheses and recommendations.

First, the different "products" being marketed appear to be lumped together, causing some confusion, even though they are probably clear in the view of AmidEast staff. TFD seems to be marketing (1) U.S. training, (2) AmidEast's aims and activities, and (3) the value of human resources development. The second two "products" have not received as much attention as the first.

- In view of our recommendation to replace most U.S.-based masters-degree training with Morocco-based masters-degree training for private sector people (see below) this product need no longer be marketed.
- U.S. short-term training courses, we believe, should be offered and marketed through the partner institutions.
- The value of human resources should, for the purposes of clarifying and operationalizing its promotion, should be considered an "awareness-raising" activity, not a marketing activity. We will discuss awareness raising further on.

Second, the purposes and methods of marketing are probably less well understood by USAID's counterpart in this project, DFC, than is any other function of the project. Marketing is seldom--though not never--an activity of government offices. Thus, we recommend that USAID/M and AmidEast either persuade the DFC to extricate itself from marketing activities or to educate the DFC in this function. For example, does the DFC understand the intended use of the Sbihi report as a marketing tool? Does it recognize the value of TFD's participation in formal and ad hoc events as a means of attracting attention to its activities? Does it know how to judge the quality of a marketing plan?

Third, because the project includes the public sector in its targeted audience, it might work with partners to create a marketing program geared specifically to those individuals in the public sector who send *cadres* to training. Engaging the DFC in this marketing activity might serve an instructional as well as functional purpose. (This activity should not have immediate priority, however.)

- **Tuition-support.** Although the Project Paper does not say explicitly that tuition support funds should be used for selected partner institutions, we assume this was the intent and we support this limitation of their use. In the 1994-95 workplan, USAID/M, DFC, and AmidEast agreed that this budget item would be used exclusively for the 14 partners. Not everyone agrees, however, on what courses are eligible for tuition support. Should tuition support be tied directly to courses in which the project also provides technical assistance? Must a course be "new" in the sense of being developed during the course of the project? We recommend that eligibility be determined case by case at present, and that criteria be established later with some basis in experience.
- **English-language training.** A portion of the resources for English-language training was originally programmed for giving intensive training to instructors who are "involved in business/commercial English teaching." It was intended to be managed as part of the institution-building activities. Appropriately, AmidEast is now assessing the needs of the partner institutions for technical and material assistance in this area. It will offer workshops in Morocco and courses in the United States for some of these instructors.

The Roughton report raises the issue of what priority to give English-language training within the packages of support for the partner institutions. We recommend that the project be responsive to requests for assistance in curricula and training skills, but be cautious with donations of language-lab equipment. In addition, we ask whether every school needs a full-blown capacity in this area. Would it be more efficient in many cases to collaborate with existing American Language Centers?

In addition to these five kinds of activities that are already being brought into the focus on partner institutions, we think there are some others that should also be brought in: sector studies; and follow-on activities.

- **Sector studies.** The Project Paper calls for 20 sector studies, intended to define training needs within various sectors and to narrow down the scope of the project to selected sectors. Twenty sector studies is an arbitrary number used for budgeting purposes. Subsequently, the project scope has been narrowed by the selection of and focus on 14 partner institutions. At this point, we recommend that the partners undertake sector studies as market studies and that AmidEast provide them with technical assistance as needed to improve their methodology and lead to valid results. We recommend as well that these studies be done with "rapid assessment" methods--methods that are relatively quick and cost-effective. They should not be allowed to delay action with ponderous collection and analysis of data. As the preliminary *Sector Study for the Training for Development Project* (Ernst & Young) recommended, market assessments need to be ongoing, and their methodologies should be appropriate to ongoing, not one-time studies.

Other studies designed for specific objectives may well be useful. Specifically, we recommend that staff or faculty of one or more partner institutions conduct an assessment of the value of masters-degree training to private-sector enterprises.

Also, we recommend a study of the "best practices" of training industries in the United States and other countries where that industry is mature. Such a study will give training institution leaders a better vision of the Moroccan infrastructure they can help to build. Findings from this study can be used to establish benchmarks (standards) and indicators of project progress (see section on Indicators).

- **Follow-on.** We have said that follow-on activities for participants who return from the United States include two kinds of activities:
  - Infrastructure-building activities such as alumni associations and newsletters
  - Strengthening the application of individual training through debriefings and monitoring of the trainees job performance.

In the subsequent section on Impact, we cite studies on participant training that conclude that without investment in individual follow-on activities the investment in training is often wasted. We therefore believe, first, that this kind of follow-on activities are critical, and, second, that they are best handled by the partner institutions as an integral part of a training course that specifically links U.S. training with job performance. Our discussion of short-term training in the United States also touches on this recommendation.

Infrastructure-support activities also have value, but at this time they seem to have lower priority than other project activities. We therefore recommend that they be held in abeyance, except as partner institutions may request assistance from time to time in activities they initiate.

### **Recommendations on activities outside the main focus**

Finally, some activities should remain outside the focus on in-country training development: raising awareness of the value of human resources, and improving the policy environment.

- **Raising awareness of the value of human resources development.** A dilemma recognized by the project designers is that while private industries are constrained by an insufficiency of trained people at high and mid-levels, they do not have a tradition of "continuous education" or investing in employees once they have hired them. While they are willing to pay for well-educated and well-trained staff at the time of hiring, their environment does not provide them with messages that continuous education is cost-beneficial nor with the infrastructure that offers opportunities for cost-beneficial training.

Thus, the strategy of the project is to create within the private sector norms and values that encourage investment of enterprises in continuous education. This kind of awareness-raising is distinct and separate from marketing training programs and courses, and it requires something different from marketing plans and activities. Yet, as we suggested earlier, the project seems to have mixed marketing and awareness-raising activities together.

The Project Paper budgets for key individuals in training institutions, private enterprises, and relevant public offices to attend study tours and conferences in the United States as well as forums, conferences, and so on in Morocco. It also calls on the project to plan and implement such events. Only one of these has happened so far--the workshop on assessing training needs, held in Rabat, Casablanca, and Fes--partly because AmidEast staff has been overwhelmed with work with the partner institutions, partly because, like marketing, the DFC has not realized the value of these activities, and partly, it seems from reviewing workplans, because the objectives have not been clarified even among AmidEast staff.

We believe that, ideally, some of the responsibility for raising awareness should be left with the partner institutions because it is in their interest to promote the value of investment in human resources development. In reality, however, given their more pressing needs to manage and market training programs and their limited resources, this kind of activity may take low priority in their plans.

Thus, we recommend that the AmidEast staff take the lead in these activities, but involve the partners at every opportunity, and be responsive to specific requests they might have for help.

Specifically, we recommend that within the coming year, AmidEast organize a one-day forum or other event for the leaders of one sector: successful business executives, regulators, and whatever professional association or other industry "networkers" can be found. The objective of the event is to persuade them of the value of investing in human

resource development in their industry and/or the value of a strong infrastructure for human resources development. This event should include outstanding speakers that are sure to capture attention, and the perks needed to entice invitees (busy executives) to attend.

Similarly, we recommend that AmidEast organize in the coming year a study tour in the United States for top-level people in a selected industry, such as tourism. The tour would expose them to training and networking activities entirely within that sector as well as training and development activities that serve all sectors, such as those of the American Society for Training and Development (ASTD).

The upcoming study tour in August for partner institutions has the makings of a successful awareness-raising event (as well as the first step for some in establishing linkages). It should go without saying that, once it is over, those who participated should be thoroughly debriefed, not only for pedagogical purposes, but also to learn more about what to repeat and what to improve upon in the next study tour.

Next, we recommend that the project *not* take on the objective of creating a professional association in the training industry. The success of such an association will depend on the success of training institutions and the benefits they discover in networking. Attempting to cultivate such an association before it germinates spontaneously would be a futile use of scarce resources.

- **Improving the policy environment.** One of three End-of-Project Status (EOPS) items in the Logical Framework and the basis for one of the five Outputs is a favorable policy environment for private-sector training. But no activities in the project strategy are explicitly related to this Output and EOPS.

Because the project has as its bilateral counterpart a government office, the DFC, opportunities to improve the policy environment would, in theory, be close at hand. But the project has focused attention--and rightfully so--on training institutions and the private sector rather than the government. At this time, policy dialogue, except in specific terms of assistance to the partner institutions, has low priority. Yet, there are currently prominent issues relevant to the project, namely, the government's role in private-sector continuing education as proposed in the *project de loi*, proposed legislation on *formation continue*.

We recommend that USAID/M and AmidEast pay close attention to this issue and to forums in which it is discussed. But we advise against setting specific objectives for influencing policy at this time. As we will discuss in the following section on project structure, USAID/M and AmidEast do not yet have the confidence of the DFC required to engage in productive policy dialogue. Once this confidence is established, USAID/M should formulate objectives in this area, but not now.

**Component 2. Long-term and short-term training in the United States.** In the U.S. training component (Component 2), we find that the project is not moving toward its goals. For long-term training, the Project Paper scheduled 15 participants a year to attend two-year masters-degree programs (see Table 4) and 15 additional to attend one-year programs. But the AmidEast has not been able to recruit this many candidates. For short-term training, the project is meeting its goals in terms of numbers, but not in terms of proportions of women or of private sector people (see Table 4). More important, those who are going to the United States do not constitute core groups within selected sectors or institutions, nor are they individuals at high levels in their industries.

### **Recommendations on long-term (masters-degree) training**

Without exception, the individuals we interviewed had concluded that one-year or two-year training programs in the United States would not sell in the private sector. Although the intent of the project design was that enterprises would send mature mid- or high-level employees abroad, in reality, this offer was attractive neither to the management of enterprises nor to many individual employees.

As early as the 1990, in preparation for the TFD project, Ernst and Young concluded that few enterprises would send employees to training for more than one month. This conclusion has been confirmed through experience. Enterprises do not want to lose their good employees for one or two years, especially if they must pay salaries during that time. The project, through its awareness-raising component, is designed to change this attitude and help employers see training as an investment, not a cost. But that has not happened so far. Although employers want to hire people who hold a U.S. masters degree, they do not want to pay for their own employees to earn the degree. (Few U.S. companies pay for employees to take time off for graduate degree training.)

Individuals with the qualifications sought by the project ( three years of work experience and leadership potential) also seem to find the cost of spending one or two years away too high for the benefit of the degree. Those who are on a leadership track would pay a high opportunity cost by being absent and missing chances to rise in rank and responsibility. We heard from JASC members that individuals would not be persuaded that a masters degree would ensure their promotion, and that they would be better off to stay on the job and earn a promotion through good work.

The result is that only seven long-term candidates are preparing to leave for the United States this fall (the first group of the project), and only 8 are in training for next year. Less than half of these are from the private sector.

We therefore reiterate the conclusion that U.S.-based masters-degree training is not attractive and is not a good use of project resources. We concur with the recommendation of the Mission and AmidEast that it be largely replaced with in-country masters-training programs in some of the 14 partner institutions. Some masters-degree slots might be reserved for highly selective cases in

which a cost-benefit analysis demonstrates that such training will have a significant impact on job performance and the institution or enterprise that sponsors the trainee.

The implications of this recommendation on the project design and budget need careful consideration. The funds budgeted for this training might be reallocated to short-term U.S. training. In any case, project funds (not contractor funds) would be used for U.S. training. Contractor funds would be used to provide the technical and material assistance to institutions to design and implement the masters-degree programs. Whether tuition-support funds (which are project, not contractor, funds) could be used for courses in masters-training programs as well as for courses that are not part of masters-degree programs needs to be decided by the Mission. We suggest that the Mission prepare a detailed implementation plan for this recommendation.

### **Recommendations on short-term training**

Short-term training in the United States has not been driven by impact nor managed to ensure impact. The Project Paper calls for core groups of mid-level technical and managerial *cadres* to receive short-term training through off-the-shelf courses, workshops, seminars, conferences, and study tours. Individuals are to be selected on a competitive basis for these opportunities to increase the likelihood that they will be qualified leaders in their industries.

But, in general, this is not happening. Candidates are spread thinly among institutions. So far 31 of them represent 27 institutions, including 10 ministries (public sector) and three university faculties. They are also spread over nine "themes" rather than concentrated in selected sectors. "Themes" include women in development and training of trainers, for example, which is not the same as sectors, such as tourism or telecommunications. Thus, there will be little or no impact within a sector of training by a group of people who can continue to network and work together to influence the sector upon their return to Morocco.

Short-term U.S. training has not been managed to ensure that it will have an impact on the job performance of individual trainees. As we discuss in the subsequent section on Impact, the evidence from USAID participant training programs in other countries is clear: U.S. training is far more likely to make an impact on job performance--and therefore on the enterprise and the sector--when it is preceded by extensive preparation involving the trainee and his or her employer and by extensive follow-on with the same people. This is not occurring in Morocco.

Short-term training is not attracting high-level people. The project design was intended to reach influential business leaders who would return from the United States with the new insights and authority to make changes in their industry. But instead, it seems to be attracting mid-level people who, without the support of either a critical mass or their managers, may have little chance to influence their work environment.

An exception to these general statements is the two study tours, the one for hydraulics engineers that has taken place and the planned study tour for representatives of the 14 partner institutions.

The former was successful in the eyes of those who attended and of the mission, and the latter appears to be well planned and moving ahead.

Based on the shortcomings of short-term training in the TFD project and on principles of cost-effective participant training, we recommend a number of changes to the U.S. short-term training subcomponent. First, it should be provided for two different purposes through two different formats.

- The first of these is for mid-level managerial and technical trainees who are enrolled in courses at partner institutions. The purpose of this training is to augment their course of study in Morocco with a module that exposes them to U.S. faculty, curriculum, and the working environment.
- The second is for high-level people and core groups of mid-level people who are invited to attend study tours or series of events designed or identified by AmidEast. The purpose of this training is to expose core groups of leaders in a selected sector or function, especially when it is related to human resources development, to the best of the relevant industry in the United States.

Next, both academic courses and study tours should be tailored to the extent possible by AmidEast and not picked from "off the shelf" unless they are truly appropriate. The latter are outrageously expensive and not always of high quality. In order to maximize the impact of short-term training on job performance (in the case of mid-level trainees) and concrete steps to advance the industry or sector (in the case of high-level people), their experience in the United States needs to be specifically tailored to their responsibilities at home.

In this regard, the partner institutions must design training needs analyses and verification systems for not only their own pedagogical purposes but also for the project's use in monitoring the impact of training. We offer some specific suggestions here, and refer the reader to the final section of this report, on Indicators.

- Build on the December 1993 workshops on training needs assessment involving some of the 14 partner institutions to further develop their skills in training needs assessment and planning. Include the *ingénierie de la formation* (training consulting) skills which will allow partners to link training directly to personal and organizational performance assessments and to employee career planning
- Follow these up with partner-specific technical assistance or workshop that helps them to design how this function can be integrated into their normal procedures. (This is planning for application of **their** new skills.)

- **Make sure that the partner institutions include this planning package in their advertising. It avoids surprises for applicants, and also builds awareness in enterprises that this is all part of training their employees.**
- **Train USAID/M and DFC further, in how to monitor partners capacity in carrying out this function.**

**If the partner institutions select candidates for short-term U.S. academic training based on enrollment in their own programs of study, competitive selection of these trainees (we are excluding study tour participants here) by the project selection committee will disappear. In order to ensure that qualified individuals are selected for short-term training, we propose that AmidEast work with the partners to develop standards and criteria for selection into their program of study.**

**We suggest that a small amount of funds be reserved for special cases in which USAID/M wants to program individuals who do not fall into either of these categories. USAID/M and the government would, of course, also have the ultimate option of denying travel to particular individuals selected by the institutions.**

**We also support the mission's intention to develop a detailed plan to integrate masters-degree and short-term training modules in the United States into the programs of partner institutions. (The mission has suggested using a consultant to assist in this activity.)**

## PROJECT STRUCTURE AND COORDINATION

This section addresses the question: *Is the project structured in a manner that is leading to the achievement of project goals?* In response, we examined the historical orientation and the roles and responsibilities of all the project partners that are stated in project documents, and compared them to tasks currently undertaken, especially in light of the increased emphasis on Component One of the project.

### Findings

**Reorienting the Project.** We consider TFD to be a sector development or industrial promotion project, training being the sector or industry. We also consider it a training-*management* project as opposed to a training-*administration* project. In order to fulfill this mandate, the project needs to cover multiple functions are covered under each of the these rubrics, which we have listed below.

Industrial Promotion Functions	Training Management Functions
Analyzing of markets	Performing problem analysis
Benchmarking	Performing training cost/benefit analysis
Tracking, predicting trends	Establishing impact indicators
Developing technologies	Establishing training objectives
Supporting research	Choosing training approaches and methods
Influencing legal, regulatory environment	Monitoring progress
	Facilitating training application
	Following up on training application

We believe that some, but not all, of these functions are now carried out by the TFD project. Specifically:

#### Industrial Promotion

Few of the functions above are second nature to either DFC or USAID/M when it comes to training-industry promotion, though several colloquia and conferences have been organized under the Public Works ministry on continuing education. However, DFC's stance has been more regulatory than promotional, in our view. Industrial promotion is a relatively new role for USAID/M, and the Training Office has virtually no experience in it.

#### Training Management

Both USAID/M and DFC have traditionally been administrators of scholarships rather than managers exercising the functions listed above. Though care is taken to match training to the educational background of candidates, little or no verification or analysis of training needs and expected outcomes has been possible. The sponsoring ministries or USAID projects were assumed to have made appropriate needs analyses, which left little except processing of dossiers for either DFC or USAID.

With the shift in emphasis from participant training-administration to training-industry development, the need to fulfill these industrial-promotion functions has become apparent. The choice of situating TFD within the traditional counterpart department for participant training is a legitimate issue to raise. Debate aside over the appropriateness of a public sector entity working with private sector beneficiaries, the necessity of planning for development impact leads us to think that the offices skilled in administering participant training are not necessarily the most appropriate for supporting private sector development and the development of an industry.

**Changes within DFC and AID.** Within the GOM, a May 1994 document concerning the reorganization of the *Administration de la Formation Professionnelle et de la Formation des Cadres* (AFPFC) lays out proposed new Divisions and Sections within the three major Directorates of the Administration (of which DFC is one). At first glance, the Directorate of Technical Training (*Direction de l'Enseignement Professionnel - DEnP*) would appear to have as strong a claim as a counterpart as DFC. While DFC deals with executive (*cadre*) and DEnP with technical (*professionnel*) training, both ought to be brought into the discussion of the development of the training industry. Leadership development will be required for both executive and technical sides of private sector companies in Morocco--the project should consider both types.

Within the DEnP's proposed purview are the following Divisions and Services:

- *Division Promotion des Modes de Formation*
  - *Service Formation Continue*
  - *Service Formation Alternée*
- *Division Secteur Privé*
  - *Service Promotion et Développement*
- *Division Coopération Internationale*
  - *Service Coopération Bilatérale*

Within USAID/M, the current state of flux has prompted the discussion of the proper place for the Training Office. PHR or GDO/PDO are the favored places. The Private Sector Office would be a third option, supervising as it does, for example, the New Enterprise Development project, which also targets human resources development and a growing sector of the Moroccan economy. The necessity of concentrating on development impact rather than trainee outputs makes this option one to consider, and offers additional possibilities for linkages among projects within AID's portfolio.

**Planned vs. actual roles and tasks.** In principle, the tripartite structure of the project appears sound. The Project Paper, the Project Agreement and the AmidEast contract lay out a comprehensive set of roles and corresponding tasks for each of the three main project parties. All parties have agreed in principle and in writing on how the roles as stated should lead to project objectives.

But as project implementation has unfolded, roles and tasks have not always matched the levels of the responsibility stated in these documents. The main project parties and their major roles are listed below.

<i>USAID</i>	Project design, policy, oversight, approval of workplans, project evaluation
<i>DFC</i>	Project policy, oversight, approval of workplans
<i>AmidEast</i>	Project implementation
<i>JASC</i>	Advice to project on private sector, selection of US trainees
<i>14 partners</i>	Benefit from technical assistance and commodities, training of private sector clients

Table 6 summarizes the historical orientation, the roles and responsibilities of the parties stated in project documents, and the actual tasks currently carried out by the three parties.

Table 6a. TFD roles and responsibilities: Historical orientation

DFC	USAID	AMIDEAST	JASC	14P
<ul style="list-style-type: none"> <li>-Prepare studies on exec training</li> <li>-Plan public sector executive training</li> <li>-Study and follow up legislation on exec training</li> <li>-Coordinate/evaluate exec training systems and activities</li> <li>-Plan and execute scholarship programs</li> <li>-Assist institutions to develop research and FC</li> <li>-Promote sports and cultural activities in institutions</li> <li>-Establish degree equivalency for PS training</li> </ul>	<ul style="list-style-type: none"> <li>-Prepare pre-project studies, Project Paper</li> <li>-Monitor contract performance</li> <li>-Evaluate projects</li> <li>-Establish and maintain contacts with GOM counterparts</li> <li>-Manage participant training</li> <li>-Manage public sector projects</li> <li>-US and third-country training processing</li> <li>-Maintain PTIS database</li> </ul>	<ul style="list-style-type: none"> <li>-Business development</li> <li>-Counsel, process and manage trainees</li> <li>-Gather maghreb training information</li> <li>-Gather information on US training for maghreb students</li> </ul>		

Table 6b. TFD roles and responsibilities: Stated roles (per PP, ProAg, JASC memo)

DFC	USAID	AMIDEAST	JASC	14P
<ul style="list-style-type: none"> <li>-Overall project direction and planning</li> <li>-Ensure compatibility of TFD policy directions and implementation with Morocco's training and economic development strategy</li> <li>-Co-chair JASC</li> <li>-Conduct policy dialogue with government agencies</li> <li>-Prepare dossiers for public sector participant trainees</li> <li>-Participate with appropriate diagnostic studies for policy reform</li> <li>-Link with the private sector as appropriate</li> <li>-Participate in evaluation of project impact</li> <li>-Review contractor SOW</li> </ul>	<ul style="list-style-type: none"> <li>-Overall project direction and planning</li> <li>-Project management and contract supervision</li> <li>-Adherence to USAID policy and procedures</li> <li>-Achievement of project objectives</li> <li>-Co-chair JASC</li> <li>-Review sector-specific training needs assessments, workplans, training activities</li> <li>-Manage US training</li> <li>-Approve TA SOWs</li> <li>-Review consultant reports</li> <li>-Design project evaluations</li> <li>-Network with returned participants</li> <li>-Liaise with GOM, private sector, other donors re: HRD</li> </ul>	<ul style="list-style-type: none"> <li>-Design, implement, monitor, and evaluate partnerships</li> <li>-Conduct with each partner strategic planning and annual workplans</li> <li>-Serve as partners' point of contact for technical and operational issues</li> <li>-Conduct annual appraisals of 14P</li> <li>-Determine in-country training needs &amp; develop programs to meet them</li> <li>-Adapt and market training</li> <li>-Coordinate and encourage linkages between US and Moroccan institutions</li> <li>-Maintain PTMS</li> <li>-Provide support for US training</li> </ul>	<ul style="list-style-type: none"> <li>-Develop policy guidelines</li> <li>-Establish selection criteria, procedures, standards</li> <li>-Select participant trainees</li> <li>-Monitor performance and progress toward goals</li> <li>-Recommend adjustments</li> <li>-Coordinate various actors</li> <li>-Serve as a forum where views are exchanged</li> </ul>	<ul style="list-style-type: none"> <li>-Prepare strategic plan and annual workplans</li> </ul>

Table 6c. TFD roles and responsibilities: Current actions (*tasks performed*)

DFC	USAID	AMIDEAST	JASC	14P
<ul style="list-style-type: none"> <li>-Approve TFD publicity</li> <li>-Approve TFD attendance at publicity events</li> <li>-Comment on consultant SOWs</li> <li>-Designed logo</li> <li>-Helped select 14P</li> <li>-Approved workplan for 14P</li> <li>-Redrafted letters to 14P</li> <li>-Maintain 14P contacts</li> <li>-<i>(Proposed)</i> Prepare minutes of meetings</li> <li>-Propose public sector US training candidates</li> <li>-Participate in selection of US trainees through JASC</li> <li>-Develop national policies on formation continue</li> <li>-Prepare national colloquia</li> </ul>	<ul style="list-style-type: none"> <li>-Approve contract amendments</li> <li>-Conduct project evaluations</li> <li>-Approve consultants and their SOWs</li> <li>-Approve TFD publicity</li> <li>-Interface with USIS</li> <li>-Communicate officially to DFC for AE</li> <li>-Approved logo</li> <li>-Helped select 14P</li> <li>-Approved 14P</li> <li>-Approved 14ps workplans</li> <li>-Participate in selection of US trainees through JASC</li> <li>-Process PIO/P and other papers for US trainees</li> <li>-Organize and run predeparture orientation sessions</li> <li>-Maintain contacts with employers during training</li> <li>-<i>(Attempted)</i> to conduct post training interviews</li> </ul>	<ul style="list-style-type: none"> <li>-Prepare annual workplan</li> <li>-Contracted for and managed local media and graphics services</li> <li>-Prepare advertising for AID/DFC approval</li> <li>-Place advertising</li> <li>-Conducted media events</li> <li>-Participates in business association meetings</li> <li>-Prepared minutes of all meetings <i>[taken over by DFC, but not done]</i></li> <li>-Prepared agendas and documents for meetings</li> <li>-Managed 14P selection</li> <li>-Managed, synthesized 14Ps diagnostics</li> <li>-Maintain contact with 14P; manage all TA</li> <li>-Collect US ST training information</li> <li>-Prepared alumni directory</li> <li>-Prepare and manage all consultancies for workshops, studies and marketing</li> <li>-Prepare dossiers for private sector US training candidates</li> <li>-Installed PTMS; data entry</li> <li>-Prepare technical reports, including annual progress reports and financial and accounting reports</li> </ul>	<ul style="list-style-type: none"> <li>-Established US training selection criteria</li> <li>-Selects US training candidates</li> </ul>	<ul style="list-style-type: none"> <li>-Have had to make 4 iterations of needs</li> <li>-Formed Comités Directeurs on global issues</li> </ul>

## **Discrepancies between planned roles and current tasks.**

### **DFC**

The DFC is clearly meant to play an oversight role from a government perspective, with implementation responsibilities limited to the forwarding of public sector participant trainees. However, DFC is implicated in detailed project management and decision-making on almost a daily basis. While it must be recognized that the selection and planning for work with the partner institutions required much more of everyone's time than envisioned, DFC's detailed involvement in project activity extends to choosing a logo and writing the minutes of meetings, neither of which is an oversight function.

### **USAID/M**

General oversight is also the major role envisioned for USAID, though administration of participant trainees is a significant task that none of the other partners is authorized to perform. While approval for major contract decisions requires detailed examination of proposals and works plans, USAID/M has participated as well on almost a daily basis in project management. Part of this stems from the Mission's need to act as gatekeeper between DFC and AmidEast.

### **AmidEast**

AmidEast operates most closely to its stated mandate, though with severe limitations in its ability to make operational decisions and to move around effectively in the private sector. Tasks such as the preparation of a marketing strategy are routinely slowed by both USAID/M and DFC, who take more time than planned to approve them. Contractor autonomy, which is necessary for such a private sector project, is severely limited.

### **JASC**

The JASC was designed to advise on private sector training needs, to help establish TFD project policies, and to help select the best trainees for US training. However, since the arrival of the contractor, JASC involvement in advisory and policy matters has dwindled substantially. Non-AID and DFC members do not participate as actively as planned in the trainee selection proceedings.

We suspect that the most professionally rewarding aspect of sitting on the JASC for these members is not the trainee selection, but the advisory and policy-making aspect, and since this has not been stressed, members may have become disinterested. Trainee selection does not appear to us to be the most effective use of these members' talents, though fairness and transparency of the proceedings (which non-AID and DFC members' presence was thought to guarantee) remains a real concern. This concern will become less when the 14 partners begin to recruit and select short-term training candidates (with more detailed training needs analysis and training impact planning assured by the partners) and by the reduction of the numbers of masters candidates. We recommend that the trainee

selection function be removed from the JASC mandate, leaving a reconfigured entity (the JAC?) with a purely advisory role.

**Understanding of roles in achieving project objectives.** The current discrepancies between planned roles and current tasks appears to stem from conflicting values, interests, and self-images of the three main parties. These differences make it difficult to identify with one another, to deal with partner institutions, and to share information about strategies, budgets or workplans. The DFC thus decries a "lack of transparency," while AmidEast marvels at the level of detail required by DFC to make decisions. USAID/M then attempts to help the process along, by attending to much more detail than it normally would.

### **Self-image**

While AmidEast needs to project an image of a successful, responsive, fast-moving business, the DFC and USAID must portray themselves as cautious, prudent, even-handed protectors of the public good. Thus, the DFC, USAID/M and AmidEast have quite different views of how each should deal with the private sector. Because DFC has played a primarily administrative and regulatory role in the past, it is uncomfortable with AmidEast's spontaneous contacts with the private sector. The result of DFC's desire to remain impartial with private institutions (especially with private businesses) has been to place unnecessary limits on AmidEast's freedom to interact with private sector businesses as well.

### **Values**

Within USAID, the value of trainee numbers has decreased dramatically over the years, as training impact, rather than body counts, has become the measure of success. Both political pressure and increased training professionalism within USAID have promoted this evolution. These same pressures have not affected DFC, however, which still may obtain prestige according to the number of scholarships managed. TFD requires letting go of the importance of trainee numbers, which may be a difficult proposition.

### **Organizational culture and management styles**

The tripartite team of DFC, USAID/M and AmidEast is engaged in an ongoing search for comfortable working relationships. As noted in the Rogers report of a half-day workshop with TFD partner members, the nature of the protracted search is due to more than personal management styles among personnel; Rogers also points to major differences in organizational cultures. We concur that this is a major reason for the current discrepancies between stated roles and tasks.

### **Decision-making**

Decision-making has suffered from the unresolved differences in organizational cultures and management styles within TFD. Inter-organizational decision-making is difficult even when the

relationships between the parties are equal, when values are shared, when the stakes are equally important to all, and when the members have the same backgrounds. Because the TFD team does not have a "level playing field" in these respects, and because they have not adequately acknowledged and compensated for these differences, the three parties it difficult to arrive comfortably at project decisions.

We have conceived of the project staff as two levels of authority, shown in the box below.

<p>Level 1: TFD Management Committee</p>	<p>DFC: Director                   Chef de Division</p> <p>USAID/M: Chief, PHR                   Training Officer</p> <p>AmidEast: Director                   Training Director</p>
<p>Level 2: TFD Support Staff</p>	<p>DFC: Chef de Service</p> <p>USAID/M: Training Specialist                   Training Assistants</p> <p>AmidEast: Training Assistants</p>

At present, operational decisions, such as the wording of letters and newspaper ads, which ought to be made by lower level staff are routinely taken up by higher level personnel. Further, within Level 1, there are opposing points of view about which of the parties has authority to make decisions on a wide range of operational issues. These issues range from whether or not the contractor can speak with private enterprises on behalf of the party without a DFC person present, to whether to commission certain sector studies, to whether to adopt a logo proposed by the contractor. All three parties have mentioned their desire to manage the project collaboratively, but this does not mean that every level needs to participate in every decision.

We note that USAID is comfortable in giving AmidEast much more leeway than is DFC--managing a contractor is viewed quite differently by DFC than by AID. We agree with this viewpoint, and we think that AmidEast's organizational culture and style is appropriate to its work in the private sector. We do not agree that it should adopt the more ponderous, cautious style of the public sector.

We therefore recommend that USAID take a firmer hand in persuading the DFC to refrain from interfering in the operational decisions and AmidEast's day-to-day encounters, plans and activities within the private sector. We suspect that more structure might help the TFD team be more efficient in its decision-making. Level 1 staff, which we suggest be called the Management Committee, should deal with the project's strategic issues, per the project documents. We recommend that this committee

hold regular weekly meetings (as opposed to more frequent, ad hoc meetings) as an important way of improving decision-making.

These meetings should be staffed by AmidEast, as originally intended, and that the other two parties help AmidEast to prepare the agenda and necessary documentation for each meeting. A format for minutes of meetings must be agreed upon that suits the needs of all parties.

The staff of each party will follow up on decisions made at the meeting and report back at an agreed-upon future meeting on action taken. The staff of each party will work together at each level to prepare for the meetings, making sure that issues are clearly presented and decisions formulated.

### **Communication**

The hierarchical culture at DFC has meant that everyday **written project information** has been able to flow up and down but not easily crosswise. The volume of information is generally lighter coming from DFC than going to it, and is also slower to move up and down the hierarchical ladders. This is in contrast to AmidEast, which freely provides early drafts and translations of plans, reports and projects--sometimes to excess, according to USAID/M and DFC.

As noted above, DFC is acutely sensitive to AmidEast's making contacts with and **speaking to the private sector** about the TFD project. As the only party that will have an enduring presence in Morocco, the DFC has much at stake with organizations and individuals throughout the public and private sectors. But its conservative stance has made it difficult for AmidEast to make the kinds of punctual, flexible arrangements it needs with private sector movers and shakers, especially with regard to its mandate for sensitizing the private sector about human resource development.

### **Sharing information**

Information about events in DFC or USAID/M that affects the project does not travel so easily. For example, DFC did not see the AmidEast budget, which it had been reclaiming for months, until this month. DFC wanted to know how much of the project was allocated to partner institutions, principally, so it could satisfy institutions' requests for information. AmidEast is not always sure of the types of information it may disclose, and USAID/M is slow to decide which budgetary information it is willing to disclose--a fact which makes it appear less than transparent, in DFC's eyes.

**Administrative roles and tasks.** With the shift in emphasis to development of the Moroccan training industry rather than traditional participant-training administration, roles for all three parties in will require updating. Currently, the DFC plays its traditional role of forwarding public sector dossiers to TFD for selection, and participates in the trainee selection as well.

There will continue to be a high level of effort needed for U.S. training administration. We feel that efficiencies can be realized by shifting and streamlining responsibilities from AmidEast to AID.

PTMS is the most striking example. AmidEast has begun to enter data on TFD trainees into the system which is still plagued by bugs. AmidEast has an informal arrangement with a local programmer, but is not covered by any support contract available to USAID/M missions. (PTMS was designed for Missions, not contractors). Once the participant trainees are selected, USAID/M prepares the PIO/P and otherwise completes the dossiers. It then sends a hard copy of the PIO/P to AmidEast to enter the data into PTMS. This defeats the purpose of PTMS, which was designed to streamline the record-keeping by having one office type the information only once.

For years, the USAID/M Training Department has been geared toward processing U.S. participant trainees. With the shift in project design away from long-term training in the United States and toward in-country training infrastructure development, the training staff at USAID/M will need to revamp its activities accordingly.

The Training for Development project is intended to differ dramatically from other participant training projects in its effort to link training directly to job performance, especially in the private sector. Although this is being done in some USAID missions, such as those participating in the CLASP project in Latin America, it is breaking new ground.

We believe that the Training Department should take responsibility for monitoring the progress and impact of the project on the basis of indicators that are to be developed with assistance from the HERNS project. The training staff may need training or orientation in specific tasks, such as developing new forms to monitor the project and other means of systematically collecting, analyzing, and reporting on data.

Table 7 summarizes current participant training administration as well as our view of how tasks should be reapportioned.

Table 7. Participant Training Flow Chart

TASKS	CURRENT				PROPOSED			
	AE	AID	DFC	JASC	AE	AID	DFC	JASC
<b>PLANNING</b>								
1. Decide training priorities				✓		✓	✓	✓
2. Decide available scholarships				✓		✓	✓	
3. Market available scholarships	✓	✓	✓		✓ <sup>1</sup>			
<b>RECRUITMENT</b>								
4. Respond to inquiries, counsel prospective applicants	✓	✓	✓		✓ <sup>2</sup>		✓ <sup>2</sup>	
5. Distribute forms & collect applications	✓	✓	✓		✓		✓	
6. Analyze needs; establish training objectives with applicants					✓		✓	
7. Complete applications (including notifying employer if necessary)	✓	✓	✓		✓		✓	
8. Pre-select candidates (verify that minimum requirements are met)					✓		✓	
<b>SELECTION &amp; APPROVAL</b>								
9. Review dossiers				✓		✓ <sup>3</sup>	✓	
10. Interview candidates from public sector				✓		✓	✓	
11. Select candidates from public sector				✓		✓	✓	
12. Prepare approval letter		✓	✓		✓			
13. Issue approval for training (sign letter)		✓	✓			✓	✓	

<sup>1</sup> Most marketing will move to the 14 training institutions.

<sup>2</sup> The bulk of this task will be conducted by the partner institutions, with the vast majority of trainees coming from the private sector. Public sector applications will still need to be processed through DFC.

<sup>3</sup> The review and selection of applicants for US training, even that which is attached to a longer partner institution, will be conducted by a streamlined AID/DFC body, rather than the full JASC, which will retain only its advisory role.

TASKS	CURRENT				PROPOSED			
	AE	AID	DFC	JASC	AE	AID	DFC	JASC
<b>ADMINISTRATION</b>								
14. Prepare dossiers / documents for placement	✓	✓			✓	✓		
15. Prepare PIO/P		✓				✓		
16. Maintain PTMS	✓	✓				✓		
17. Translate/verify documents in trainee dossier	✓	✓			✓	✓		
18. Analyze training budget vs cost of requests		✓			✓	✓		
19. Prepare and coordinate pre-departure meetings	✓	✓	✓		✓	✓	✓	
20. Register candidates for English proficiency tests		✓			✓	✓		
21. Place candidate in ELT course and monitor progress		✓			✓	✓		
22. Make travel arrangements		✓				✓		
23. Deliver travel, placement documents		✓				✓		
<b>MONITORING</b>								
24. Maintain contacts with employer		✓	✓		✓			
25. Monitor trainee progress		✓			✓			
<b>FOLLOW-ON</b>								
26. Verify trainee return to country		✓			✓	✓	✓	
27. Administer returned trainee questionnaires/interview		✓			✓	✓	✓	
28. Help returned trainee to register with alumni associations	✓	✓			✓	✓	✓	
29. Maintain contacts with returned trainee		✓			✓	✓	✓	
30. Monitor training impact on individual and/or organization					✓	✓	✓	
31. Monitor progress and impact of project					✓	✓	✓	

<sup>4</sup> Partner institutions will be responsible for this, supervised by AE. USAID/M would concentrate on documents for public sector placements.

<sup>5</sup> All ELT responsibility should ultimately be transferred to the partner institutions, since this will become part of the regular set of tasks they will need to manage if they become partners (or simple collaborators) with American institutions.

<sup>6</sup> DFC should be encouraged and assisted to develop its own system for tracking trainees, training application and training impact assessment. May be out of the scope of the current Project Agreement, but is essential for better control of training impact.

## Conclusions and Recommendations

While the roles and responsibilities of the major project partners are clear on paper, the implementation of the project has seen the DFC and USAID/M become intimately involved in day-to-day project management. Decision-making and communication must become more efficient. We recognize that decisions about the workplans have been critical and perhaps justify detailed involvement at even the highest levels. But the precedent for inefficient decision-making on large issues has been set, and we wonder whether the parties will fall into the same patterns when the next big set of decisions comes due.

Recognizing organizational differences and being willing to adapt are two different issues. USAID/M and AmidEast have gone further to adapt to each other than DFC has done, which may simply be because they have the most common points to begin with. DFC's willingness to allow more freedom for the project contractor must be countered by well-thought out plans from AmidEast. Shifting training administration tasks in order to free up the contractor to deliver high-quality technical assistance will allow this to happen.

We recommend the following specific changes:

- Discuss the current restructuring activity taking place in DFC and USAID/M. The goal is not necessarily to make a switch of counterpart entities, but to recognize up front the functions that USAID/M and GOM must fulfill assure for and identify locuses of institutional support.
- USAID/M must take a firmer hand in persuading the DFC to refrain from interfering in the operational decisions and AmidEast's day-to-day encounters, plans, and activities within the private sector. USAID/M has more experience with management of projects of this type, is more aware of the special requirements of dealing with the private sector and with managing contractors. Use this experience to move the project along when required.
- Identify levels of decision-making authority for various types of decisions. Top-level managers should refrain from making small, everyday decisions. Authorize junior staff to work together on staff support.
- Limit the involvement of Level 1 staff (in our illustration), which we suggest be called the Management Committee, to strategic issues, per the project documents. We recommend that this committee hold regular weekly meetings (as opposed to more frequent, ad hoc meetings) as an important way of improving decision-making. These meetings should be staffed by AmidEast, as originally intended, who will consult with the other two parties in preparing the agenda and documentation for each meeting. A format for minutes of meetings that suits the needs of all parties should be agreed upon.

- Develop and use a tool for these project management meetings to track progress on project activity. Keep it brief and visual in order to keep the meetings moving. AmidEast should update the tool weekly in preparation for the meetings.
- Remove the trainee selection function from the JASC mandate, leaving a reconfigured entity (the JAC?) with a purely advisory role. Change the frequency of meetings to quarterly.
- Hold strategic planning meetings once per quarter. Strategic progress must be the focus of these meetings, rather than day-to-day activity. Reorientation of project strategy, discussion of annual workplans, suggestions for HRD awareness-raising, as well as discussions of private sector trends in Morocco and the region are all appropriate topics for presentations and discussions. USAID/M should strongly push for holding these meetings away from the DFC offices.
- Allow junior staff to work together to prepare project activities, such as marketing, proposals for studies or workshops. DFC should provide the minimum of a telephone and computer to DFC junior staff (the Chef de Service) to facilitate this.
- Reduce the volume of French translation by refraining from translating each draft version. The three parties should establish guidelines on which types of documents need to be translated, and which will require only a summary in French.
- Establish policy for reading and reply time limits for draft reports, etc.
- Continue the progress on team-building begun in May 1994 with Rogers. Hire a firm such as Training Resources Group (not Coverdale) to conduct additional off-site workshops that are mandatory for all DFC, USAID/M and AmidEast staff. Supply additional internal management and training-management training for each of the three parties, based on the specific needs of each. Concentrate on concrete techniques for this assistance.
- Provide appropriate training in management skills to the DFC and AID, as well as junior AmidEast staff. They all need to know how to make training impact happen, which is possible only through having the skills listed in the box on the first page of this chapter. AmidEast staff needs to be able to monitor the training needs assessment which is being provided by partner institutions for US training.
- Relocate the responsibility for PTMS to AID.

## PROJECT MANAGEMENT

In this section, we address the question: *Is the basic management of the project appropriate to achieving project goals?* Our findings are related to data on

- The actual schedule of activities compared with planned schedules (Table 8)
- Present staffing patterns and proposed revised staffing patterns (Table 9)
- AmidEast's budget summary to date (Attachment 3).

### Findings

**Timing of events.** In the previous section on Project Goals, we found that many of the scheduled activities have not started on schedule. In this section, we want to find the extent to which delays are related to USAID/M's, the DFC's, or AmidEast's management of the project. For this purpose, we first developed a calendar of events that compares the implementation plan of the Project Paper with what has actually happened (see Table 8).

Table 8a. Planned (Project Paper) and actual schedules of activities

Plan	Actual	Activity
8/91	8/91	USAID signs project authorization
8/91	8/91	GOM/USAID sign project agreement
11/91		USAID issues RFP
5/92	12/92	USAID/AmidEast sign contract
8/92	2/93	Contractor Chief of party arrives
8/92	5/93	Contractor establishes office and staff
	5/93	<i>Contractor training specialist arrives</i>
9/92	11/93	Contractor initiates diagnostic studies and determines targets
	12/93	Contractor initiates in-country training
9/92	8/93	Contractor begins to identify local institutions
9/92	4/93	Contractor submits workplan to JASC
	4/94	<i>DFC/USAID select (sign MOU with) partners</i>
2/93	6/94	USAID/GOM conduct in-house evaluation to prepare for full implementation
9/93	10/93	AE submits first annual report
9/93	1/94	AE submits 1994 workplan
9/93	6/94	JASC approves workplan

Table 8a reveals a seven-month delay between the scheduled and actual RFP issue and a six-month delay between the scheduled and actual arrival of AmidEast's chief of party in Morocco. While the contract anticipates one month for setting up an office and management systems, this activity actually required three months, which is not unreasonable. While the diagnostic studies of institutions and sectors were scheduled to begin the same month the chief of party arrived, they were not actually initiated until the ninth month after his arrival. Activities in italics are those not scheduled in the Project Paper implementation plan but which significantly affected the progress of the project. Extremely interesting is that the Project Paper schedule does not specify a period of time for the selection of partner institutions to take place, yet this activity actually consumed about eight months.

In short, most significant delays in activities appear to be due to miscalculations in the Project Paper's implementation schedule about the amount of time and effort required for activities such as issuing an RFP and establishing the contractor's offices and systems.

The second schedule of events was presented in AmidEast's 1993 workplan, which was submitted in July 1993 (see Table 8b).

Table 8b. Planned (AmidEast 1993 workplan) and actual schedule

Plan	Actual	Activity
10/93	2/94	Select 10 institutions
11/93	4/94	Contract with 2 institutions
12/93		Initiate TA with 2 institutions
10/93	10/93	Market U.S. training opportunities
9/93	9/93	Establish PTMS
9/93	7/93	Take over Jefferson fellow dossiers
6/93	9/93	Build library
10/93	12/93	Create alumni directory
12/93		Give computer equipment to DFC
10/93	12/93	Submit synthesis report
12/93		Hold two roundtables on report
10/93		Translate report
9/93	9/93	Set up and staff AmidEast operations
12/93	9/93	Establish in-house procedures
12/93		Deliver seminars
12/93	12/93	Follow-on program

Although it is not easy to discern from AmidEast's annual report on this workplan the dates on which activities were started and completed, this rough estimate of actual dates reveals that in most cases they were more or less on schedule. The notable exceptions were the selection of partner institutions--fourteen, not ten--and the contract with institutions--fourteen, not two. AmidEast also notes in its annual report that delays in marketing activities (not noted in detail in the workplan schedule) were largely due to the DFC's holding its approval on the release of materials for the media and the synthesis report, which was to be used as a marketing tool at forums and other events.

**Staffing patterns.** The project is managed by three parties: USAID/M, AmidEast, and the DFC. We have discussed the roles and responsibilities of each of these parties in the previous section on Project Structure. In this section, we look at the size and composition of the staff of each of these parties to see whether it is appropriate for managing its responsibilities.

### AmidEast

The contractor is currently staffed by a Chief of Party, a Training Director, a Training Assistant, Financial Manager, Assistant to the Chief of Party, a Secretary/Clerk, and a Driver. The staff also includes a Marketing Consultant who has been working full time on the project.

As a result of the project's focus on in-country infrastructure development, AmidEast's workload has increased dramatically. The staff must now provide technical and material assistance to 14 institutions (18 organizations), each of which has unique objectives, resources, and needs. AmidEast proposes adding to its staff another training specialist and a second training assistant. In addition, it would hire the Marketing Consultant as a full-time employee, shifting his responsibilities more toward training and assistance to the partner institutions (including assistance in marketing). Finally, it would extend the time of the present Training Specialist by at least one year.

### **USAID/M**

The project is managed in the Mission by the Training Department, which is within the Division of Population and Human Resources. The Training Office has a manager, three professional staff, and two secretarial staff. These staff currently devote a large portion of their time to the TFD project, although they also handle the participant training components of other Mission projects. The Director of the Population and Human Resources office has other projects in her portfolio as well.

Except for a contemplated move of the Training Department to the Program Office, no staff changes are proposed for this project.

### **DFC**

The DFC has three professionals working on this project as well as secretarial and clerical help. The director of the DFC is responsible for meeting the terms of the Project Agreement. He is assisted by the *Chef de departement* of the Bourses office, who appears to work on this project as a special assignment in addition to her bourse-related responsibilities. She is assisted, in turn, by a *chef de service*, who appears to work full-time on this project. It is difficult to determine how much secretarial and clerical help these three professionals have.

The Project Agreement states that the DFC will provide two full-time *professional* people to this project. It is difficult to assess whether the time spent on the project by the three professionals and whatever secretarial assistance they receive amount to two full-time equivalents from day to day and week to week. We have not heard of any staff changes for this project.

**Budgets.** We have not conducted a budget audit of the project in any of the three offices. According to reports from USAID/M staff and AmidEast staff, current expenditures are in line with budgets. AmidEast provided us with a summary of aggregate expenses to date which indicates that, except for the line items on consultants and other direct costs, expenses are within budget (see Attachment 3). We understand that a proposed restructuring of the budget will bring these items in line as well.

## **Conclusions and recommendations**

**Highlights.** We have found that, in spite of delays caused by shifts in strategy and frustrations caused by structural and communications problems, that USAID/M and AmidEast have for the most part skillfully managed the project's direction and implementation.

- By most accounts, AmidEast did an outstanding job of selecting partners, resulting a group that shows great promise for sustaining the benefits of the project.
- On the whole, the staff seems to work well together, even under the strains of shifting priorities and added workload.
- With the exception of managing PTMS data, which is hampered by flaws in the program, they are keeping good records of inputs and outputs, revenues and expenses. Deliverables are usually submitted on time.
- The workshops they presented in December 1993 on training needs assessment and in May 1994 on workplans were judged by AmidEast as successful.
- Although marketing efforts have been thwarted and discouraging, this is not due to poor management, as we have discussed.

From the perspective of AmidEast's Casablanca office, the subcontractor, Creative Associates International, Inc., has performed well.

AmidEast has a clear understanding of its responsibilities and sound proposals for how some of those would be better placed within USAID/M (see previous section on Project Structure). The problem related to roles and responsibilities, as we have discussed, is not one of definition. Rather, it is a problem of abiding by definitions.

**Needed improvements.** Despite the commendable work of the contractor, we find there is room for improvement in the management of each party. These are intricately related to our suggested improvements in project structure, but we repeat them here as specific recommended changes in responsibility and behavior for each party. In brief, AmidEast needs to improve its style of communication with the Mission and, even more so, with the DFC. USAID/M needs to set objectives and take action in training the staff of the Training Department to carry out its role in the major shift from training in the United States to in-country training. DFC needs to learn to delegate responsibilities and participate in rational decision-making processes.

### **Managing communication**

As we discussed in the previous section on Project Structure, the three parties have different expectations about what kind of information needs to be communicated. These differences have resulted in confusion within AmidEast about the amount and nature of what they need to present in writing to the other two parties. This confusion will not be easily sorted out, because AmidEast gets mixed signals about what it is to communicate. Nonetheless, we believe the onus is on AmidEast to examine carefully its assumptions about who needs to know what and to continue to check these with the other parties until they are better understood.

We also recommend that AmidEast carefully draft each written document, keeping in mind that it must be translated into French. Thus prose should be kept to a minimum (unlike this report) and good use should be made of graphics and tables. Concerted effort should be made to document what is necessary, but no more. Likewise, oral presentations at meetings of the three parties should be well organized, as brief as possible, and supported by enlightening visual materials. AmidEast's presentation in July of its workplan to USAID/M, for example, was well prepared, well executed, and well received.

We have suggested that the three parties hold weekly meetings to make decisions about the fit of operations into the strategic direction of the project. We recommend that AmidEast manage carefully the preparation for and follow-up of those meetings with brief formal agendas and reports on progress and activities.

### **Demonstrating good management practices**

As we have stated in the previous section on Project Structure, the internal management style of the DFC is so different from that of either AmidEast or USAID/M that it is contributing to severe problems for AmidEast in planning and managing operational activities. The project cannot impose an internal management style on the DFC. But it can demonstrate effective management procedures and style through its conduct of project meetings and tasks. In keeping with our recommendations on project structure and communications, we believe that USAID/M and AmidEast together should concentrate on demonstrating good management practices. In particular, they should

- Communicate more carefully and clearly, as discussed above
- Enforce weekly meetings, binding decisions at those meetings, and conscientious follow-through by all parties, as discussed above
- Delegate staff work and encourage staff from each of the three parties to work side by side, as discussed above.

**Management training.** As one measure toward improving the internal management of each party, we recommend that when AmidEast hires a consultant to offer a workshop to institutional partners on improving management (TQM), that consultant be brought in earlier and asked to offer either a

workshop or in-house consulting to AmidEast, the USAID/M Training Department, and the project staff at DFC.

**Staff adjustments at AmidEast.** We support the augmentation of staff being proposed by AmidEast. With the simultaneous commencement of technical and material assistance to 14 institutions, at least two full-time training specialists and two assistants should be on the staff. They should be brought on as soon as possible, and the option of keeping them throughout the term of AmidEast's contract should be left open.

The development of 14 partner institutions will constitute the core of the project strategy. Each of them has its own needs. We suggest that when the AmidEast staff is reorganized to accommodate new members, the Training Department be given the necessary staff support to be able to give individual attention to each of the 14 partner institutions. We thus suggest that the training staff responsibilities be divided along the lines of serving partners rather than along functional lines or areas of expertise, by which each staff member would work with all partners in a different capacity. It may work best to have teams of senior and junior members serve a given group of partners.

**AmidEast's 1994-95 Workplan.** Finally, we think AmidEast's 1994-95 Workplan is ambitious. It depends on the expeditious hiring of many consultants. It must be implemented during the coming months without the benefit of the proposed additional staff. It assumes that DFC and USAID/M will not continue to require approvals for every minor decision and task. We support USAID/M's decision to review that the workplan in January 1995 and to make adjustments if needed. We urge that, speed and quantity not be allowed to take precedence over quality.

We recognize a dilemma in annual planning: AmidEast is falling behind in its planning and implementation of study tours, forums, conferences, and so on, both in Morocco and in the United States, to a large extent because it has not clarified and operationalized the purpose and design of such activities in annual workplans. Yet, in many cases these activities are far more effective when they are designed in response to actual opportunities, such as requests from influential groups or individuals, or events planned by others that would dovetail with the project's goals. In this respect, they cannot be programmed on an annual basis.

Nevertheless, we think AmidEast should include in its annual workplans specific activities of this kind, even though they are not in response to "opportunities."

We support the decision made by USAID/M at the July review of the Workplan to review progress in January 1995 and make revisions to the plan as needed.

## INDICATORS

In this section we answer the questions:

- *Are appropriate benchmarks included in the contract and agreements with partner institutions to evaluate whether training targets are being met?*
- *Are indicators present to measure the impact of training activities on the individual, the institution, and the sector?*
- *Are follow-on activities incorporated in the project design that will maximize project impact and sustainability?*

We will respond to these questions first by looking at indicators built into the project design and then by suggesting other sources of indicators. In proposing other sources of indicators, we will address the issues of benchmarks and follow-on activities.

### Findings

We want to be clear that we are looking at impact indicators at the Purpose level of the Logical Framework ("to strengthen Morocco's in-country training capacity and to improve Moroccan managerial and technical skills")--not at the higher Goal level. Accordingly, the broad indicators of impact are stated in the project End-of-Project Status (EOPS):

- Improved quality and capacity of in-country training infrastructure to meet market demands related to human resources development for economic growth and private sector expansion.
- Core of more appropriately trained private and public sector personnel to participate in Morocco's economic development.
- Favorable policy environment that promotes policies, procedures, and standards of training related to the growth, financial viability and quality of private sector training.

We have examined the project design and accompanying documents to see how well these broad indicators are expressed more precisely.

**Progress indicators.** We make a distinction between *progress* (or process) indicators, which are used to monitor the extent to which planned activities are being implemented and are moving the project toward its goals, and *impact* indicators, which are used to assess the extent to which the project has changed the training industry in the private sector. Although our main concern is with impact indicators, we will touch initially on progress indicators as well.

In general, the contract with AmidEast expresses clear quantitative targets for global project inputs such as trainees, studies, workshops, or partnerships. However, the emphasis is placed on contractor activity (input level) rather than on indicators of progress towards outputs and EOPS. It is not clear whether USAID/M expected the contractor to devise indicators at project start-up. There appears to be no annual breakdown of targets on the contractor's part, and therefore the yearly levels are assumed to be constant.

While these targets are precise, the feasibility of certain ones has been unanimously questioned. As discussed throughout this report, the assumptions made about numbers of long-term trainees and numbers of training partners (the most serious examples) have been proven inaccurate. While USAID/M does not appear to be concerned with reaching every target, AmidEast is concerned, though more for contractual reasons than to accurately measure its progress towards the overall project goal.

We find that the three responsible parties (USAID/M, AmidEast, and the DFC) have considerable freedom to define the meaning of non-quantifiable contractor performance standards expressed in the contract, such as "*training adapted to private sector demands*" or "*a dynamic returnee activity program developed and ongoing.*" We fear, however, that lack of precision of these terms will allow them to be interpreted differently by each party and make it difficult for any party to measure progress. It will be hard to get agreement among the parties on how well AmidEast is performing.

AmidEast's annual workplans are much more specific than is the contract in terms of periodic, quantitative targets for trainees, studies workshops for partner institutions and the like, and offer more information on economic sectors to be targeted. But they are still on the input level.

Indicators of progress by partner institutions are expressed as annual *workplans*, not as training plans per se. As workplans, they do not specify training objectives or performance objectives. However, the diagnostic studies performed for each institution linked each training activity (workshop, study tour, equipment and so on) to a specific training objective, for example, "to reinforce Partner X's efforts to establish a training consulting division." The aggregate workplans approved in July 1994 do not explicitly restate these objectives, though they are the underlying basis for the annual set of actions organized in favor of the partners.

**Impact indicators.** We looked for indicators of impact at the individual, institutional, and sector levels.

We did not find at the **individual** level any indicators of training impact. We might expect to find these in the dossiers of selected trainees, to which AmidEast, the DFC, and USAID/M all contribute in the process of selecting individuals. For in-country training activities, individual impact has not been planned for in an organized fashion. For example, training expectations were inventoried at the start of each of the three workshops held in December of 1993, though this stopped short of planning how to apply what was taught.

At the **institutional level**, as we have noted, indicators of the impact of the project on each of the partner institutions were defined most clearly during the diagnostic studies. But these have not been reiterated or modified in the annual workplans prepared subsequently by the partners.

At the **sector level**, TFD's planning for impact started off appropriately enough with the decision to limit training to a narrow range of sectors. But the planning seems to have stopped there, in that the listing of the sectors was not followed by a definition of the specific impacts which each sector should be seeing from better trained personnel. We realize that attributing sectoral impact to an individual's or groups's training intervention can be difficult, but we believe that recognizing that the link needs to be made as clear as possible in projects such as TFD which clearly have sectoral development as their goal.

Component 1 (training-infrastructure development) has little in terms of concrete sectoral impact indicators identified; the sector studies were to provide the information needed to establish desired performance levels for the sector. Impact indicators were to flow from the recommendations for interventions in each sector. But this has not happened yet.

### **Conclusions and recommendations**

The project does not have well defined indicators of progress or--other than the EOPS--impact. This is understandable to some degree, because insofar as it was designed as a traditional participant training project (Component 2), quantitative measures (numbers of people programmed for training) were acceptable. Even Component 1, however, moves too quickly from statements of purpose and outputs to quantifiable indicators such as numbers of people trained and numbers of activities conducted.

We recommend that impact indicators be defined more precisely at all three levels--individual, institution, and sector, and we propose sources of indicators at each of these levels.

**Indicators at the individual level.** Because one of the two aspects of the purpose of this project is to train Moroccans in skills that will contribute to the development of the private sector, the link between training and job performance is the most critical of all. If training does not lead to better job performance, the impact of the project cannot be verified. Thus, the most crucial indicators of impact will be found in training plans and activities that guarantee improved job performance.

### **Evidence from other countries**

USAID has spent considerable resources evaluating participant training programs in missions around the world. We cite here two brief summaries of lessons learned that are relevant to the Training for Development project. These lessons are relevant to developing indicators, because they are themselves *early indicators* of training success:

- The training must be relevant to the trainee's responsibilities and the institutions' present and future projects.
- The trainee must be able to utilize the training and accomplish multiplier activities.
- Training must be appropriate for the technical and cultural environment.
- Continued professional development must be available after the initial training experience.
- What has been traditionally called "*follow-on*" should be explicitly formulated in the design phase and considered as part of a continuing process, not as a separate activity. This combines overseas and in-country training in a unified training plan.
- The recruitment and *training of "change agents" should focus on core groups.* ... These core groups expedite change process and ensure its sustainability.
- Because of reductions in USAID/M staffing, *contractors [and subcontractors] must play an expanded role* in all components of training<sup>7</sup>.

The above statements come from a HERNS project evaluation of a participant training project in El Salvador. These same kinds of lessons are spelled out in more detail in an evaluation report on training in Swaziland<sup>8</sup>. We include these detailed statements here, because they can be translated into indicators of impact at the individual level.

- Preparation is a factor in getting results. Results are improved when:  
*... employers have demonstrated commitment... trainees have engaged in career planning... participants and employers are involved in the planning... trainee experience is a selection criteria... management is supportive of training... the employer has an accountability system for performance targets... pre-departure orientations include advice on how study will relate to future job.*
- The implementation and management of training is important to the ways that training is used to effect development goals. Training contributes to development impact when:  
*... training affects large numbers of people... employers are in contact with employees and training institutions... training includes [Swazi] specific research projects... trainees are involved in extra-curricular activities... academic advising*

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<sup>7</sup> Strengthening the Human Capacity Development Strategy of USAID El Salvador. HERNS Project Report, Arlington, 1994.

<sup>8</sup> The Impact of Training on Development: A Study of the Impact of USAID-Sponsored Training Initiatives in Swaziland. Washington, DC, Creative Associates International, Inc.; 11/92.

*is provided by faculty who have knowledge of the trainee's job and organizational setting... training includes both theory and practice...training is regional or inc-country... contractors are involved with both the organization and the individual.*

- The immediate follow-on to the program is critical in how training will be applied and drawn upon to affect development. The impact of training is enhanced when:

*... there is a structured re-entry program... follow-up training is planned and implemented.. professional linkages with the institution is maintained... the employee's job is immediately available... job assignments are directly related to training... trainees have an opportunity to train others... the organization is receptive to the trainee's return.*

- Exogenous variable always intervene in the ability of training and the trainee to be used effectively. Training will more likely lead to impact when:

*... training is one of several interventions directed towards impact... USAID or its implementing agents is active;y managing the context in order to influence and secure a favorable environment for utilization of training... personnel policies support training... human resource development is coordinated at the organizational level regardless of donor or funding source."*

### **Involvement of partner institutions**

Because the focus of training activities has moved to the partner institutions and their capacity to improve job performance, we believe these institutions should identify the impact indicators for individuals attending their programs. Their demonstration that they provide consistently high-quality needs analysis, training, and follow-on for individual trainees should be the basis of indicators at the individual level. The package of functions each partner institution needs to supply trainees include:

- Performance problem analysis
- Training cost/benefit analysis
- Establishment of impact indicators
- Establishment of training objectives
- Choice of training solution
- Monitoring of progress
- Planning and facilitation of training application
- Follow-up of training application and impact.

For U.S. training embedded in programs offered by partner institutions, TFD must make its expectations clear that the partner is required to analyze training needs, develop detailed training objectives and develop impact indicators to be tracked.

That said, the partner institutions should not be the only entities talking to trainees about impact. Planning for impact can be reinforced at several levels--by revamping the applications forms to make them self analysis tools; or by revising the pre-departure orientations to include group analysis of training needs and expected impact. Employers should be included in a send-off which implicates them in the planning for training application and expected impact.

**Indicators at the institutional level.** As we have said, the clearest definition of development impact indicators was prepared for each of the partner institutions during the diagnostic studies. We believe that the partners' development impact indicators already identified should be revalidated (or modified) in each annual workplan prepared by the partners. Terms of reference for technical assistance should explicitly state the development impact expected of the intervention in terms of the institutional performance improvement required, as well as in terms of the individuals trained, and the expected impact on the sector.

**Indicators at the sectoral level.** Because the project seems to have had trouble targeting selected sectors for its activities, we propose another approach. In the section on Project Goals, we suggested that a study of *best practices* be conducted to give Moroccans a better vision of the training infrastructure they can build, with the project's support. Such a study would also have value in developing indicators of the project's impact on the training sector--or training industry--either throughout the private sector or within selected industries.

"Best practices" is a term used interchangeable with "benchmarks" in industry today. Both of these terms mean *standards*. We believe that in order to establish true benchmarks--or standards tied to what the best in business do--the TFD project should study the *best practices* in the professional training industry in the United States and one or two other industrialized countries. This might be done by the partners' Comités Directeurs, or through the AGEF, with adequate technical assistance from AmidEast. Findings could be presented in a conference to a large audience (businesses and training institutions) in Morocco, which would then relate these to Moroccan needs. Through this activity, the project can involve a range of participants in establishing the benchmarks against which indicators can be used to measure impact of the project on the training sector.

## RECAPITULATION OF KEY RECOMMENDATIONS

### **Project goals**

The overall direction of our recommendations is to bring the TFD project's two components into an even closer functional relationship, treating TFD more as a "development" project than as a "participant training" project, and to make training more cost-effective.

Toward the purpose of developing a strong institutional base in private-sector training, we recommend that the project be amended as necessary to codify these changes:

- Continue to focus the project strategy on technical and material assistance to the 14 partner training institutions, stressing high-quality curricula, instruction, management, and marketing of services.
- Replace U.S.-based masters-degree training with equivalent programs in Morocco.
  - Assist some of these institutions in the development of masters-degree programs equivalent in quality to programs in the United States
  - Reduce the long-term (masters-degree) U.S. training component to a bare minimum that permits highly selective masters-degree training.
- Offer short-term training in the United States to mid-level managers and professional technical people primarily as modules of courses offered at the 14 partner institutions
- Delete the relationship with the University Linkages Development project and revise the contractor's scope of work and to provide for developing linkages on an individual basis between selected partner institutions and U.S. institutions.
- Revise the procedures and criteria by which individuals are selected to receive short-term training in the United States. The new criteria should allow partner institutions to select candidates for academic-based training, the DFC to select public sector candidates, and the project to invite candidates for study tours and similar events.
- Develop detailed plans to implement these recommendations on integrating masters-degree and short-term training modules in the United States into the programs of partner institutions.

We recommend that certain activities already in the project design clarified, prioritized, and operationalized:

- Toward the purpose of raising awareness of the value of human resources development, offer study tours, seminars, and other short-term tours to high-level people in the targeted

industries, including the training industry, of the private sector. Plan and implement at least one such tour this year.

- Toward the same purpose, organize a one-day forum or other event for leaders in one private-sector industry.
- Toward the same purpose, as well as the purpose of developing project indicators, work with partner institutions to conduct a benchmarking study of the private-sector training industry in the United States and other selected industrialized countries.
- Toward the purpose of keeping partner institutions market-driven, assist them in conducting sector studies that help them define the market for their training services. Plan and implement at least one such study this year.

Finally, we recommend that, toward the purpose of improving the policy environment, USAID/M and AmidEast look for opportunities to engage the government in relevant policy dialogue, but, until they have the confidence of the DFC, refrain from setting specific objectives or designing activities in this area.

### **Project structure and coordination**

We recommend the following specific changes:

- USAID/M must take a firmer hand in persuading the DFC to refrain from interfering in the operational decisions and AmidEast's day-to-day encounters, plans, and activities within the private sector. USAID/M has more experience with management of projects of this type, is more aware of the special requirements of dealing with the private sector and with managing contractors. Use this experience to move the project along when required.
- Identify levels of decision-making authority for various types of decisions. Top-level managers should refrain from making small, everyday decisions. Authorize junior staff to work together on staff support.
- Limit the involvement of Level 1 staff (in our illustration), which we suggest be called the Management Committee, to strategic issues, per the project documents. We recommend that this committee hold regular weekly meetings (as opposed to more frequent, ad hoc meetings) as an important way of improving decision-making. These meetings should be staffed by AmidEast, as originally intended, which will consult with the other two parties in preparing the agenda and documentation for each meeting. A format for minutes of meetings that suits the needs of all parties should be agreed upon.

- **Develop and use a tool for these project management meetings to track progress on project activity. Keep it brief and visual in order to keep the meetings moving. AmidEast should update the tool weekly in preparation for the meetings.**
- **Remove the trainee selection function from the JASC mandate, leaving a reconfigured entity (the JAC?) with a purely advisory role. Change the frequency of meetings to quarterly.**
- **Hold strategic planning meetings once per quarter. Strategic progress must be the focus of these meetings, rather than day-to-day activity. Reorientation of project strategy, discussion of annual workplans, suggestions for HRD awareness-raising, as well as discussions of private sector trends in Morocco and the region are all appropriate topics for presentations and discussions. USAID/M should strongly push for holding these meetings away from the DFC offices.**
- **Allow junior staff to work together to prepare project activities, such as marketing, proposals for studies or workshops. DFC should provide the minimum of a telephone and computer to DFC junior staff (the Chef de Service) to facilitate this.**
- **Reduce the volume of French translation by refraining from translating each draft version. The three parties should establish guidelines on which types of documents need to be translated, and which will require only a summary in French.**
- **Establish policy for reading and reply time limits for draft reports, etc.**
- **Continue the progress on team-building begun in May 1994 with Rogers. Hire a firm such as Training Resources Group (not Coverdale) to conduct additional off-site workshops that are mandatory for all DFC, USAID/M and AmidEast staff. Supply additional internal management and training-management training for each of the three parties, based on the specific needs of each. Concentrate on concrete techniques for this assistance.**
- **Provide appropriate training in management skills to the DFC and AID, as well as junior AmidEast staff. They all need to know how to make training impact happen, which is possible only through having the skills listed in the box on the first page of this chapter. AmidEast staff needs to be able to monitor the training needs assessment which is being provided by partner institutions for US training.**
- **Relocate the responsibility for PTMS to USAID/M.**

### **Project management**

To improve management of the project as a whole, we recommend that each of the three parties make some internal adjustments:

- AmidEast diagnose and resolve its communication problems with the Mission and, even more so, with the DFC.
- USAID/M set objectives and training the staff of the Training Department to carry out its role in monitoring indicators of project process and impact.
- DFC delegate responsibilities among its staff and participate with the other parties in rational decision-making processes.

We recommend, since management training is an important part of this project, and to some extent it can be taught by example, that management-training consultants hired to work with the partners also be hired to work with the three managing parties: DFC, USAID/M, and AmidEast, both internally and as a tri-partite management group.

We concur with AmidEast that its contract be amended to provide for a larger staff, which can focus on development of the 14 partner training institutions.

We support the decision made by USAID/M at the July review of the Workplan to review progress in January 1995 and make revisions to the plan as needed.

## **Indicators**

Our preliminary recommendations (pending the completion of the SST evaluation) include the following:

- Indicators should be developed at the Project Purpose level, stemming from the EOPS. They should reflect impact at the level of individual trainees, partner training institutions, and the training sector.
- To develop indicators of impact at the individual level, the project should rely on lessons learned by USAID/M about predictive indicators of success. These turn on the project's ability to link training to improved job performance.
- To develop indicators of impact at the institutional level, the partners' development impact indicators already identified should be re-stated and revalidated (or modified) in each annual workplan prepared by the partners.
- To develop indicators of impact at the sector level, the project should conduct a study of best practices, or benchmarks, in the professional training industry in the United States and other industrialized countries.

## ATTACHMENT 1: INTERVIEWS

### **USAID/Morocco**

Joyce Holfeld, Director, Population and Human Resources Development

Monique Bidaoui, Project Officer

Abdellatif Benabdsesselam, Project Specialist

Dominique Zemrag, Participant Training Assistant

Jamila Hidare, Participant Training Assistant

James Radsky (sp?), Acting Mission director

### **Direction de la formation des cadres**

Hassan Naciri, Directeur

Fatima Z. Souleimani, Chef de division

Aziza Zemrani, Chef de service

### **AmidEast**

Jonathon Smith, Chief of Party

Peg Clement, Training Director

Sanaa Bennouna, Training Assistant

Younes Sbihi, Consultant

Bernadette Moulay, Executive assistant

Halim , Financial manager

### **JASC**

Larbi Koullou, Attache a la Direction Generale, Chef de departement Personnel et Formation, Societe marocaine de constructions automobiles (SOMARCA)

Mohammed Abdelkader Belarbi, Administrateur, Directeur General, Societe marocaine de constructions automobiles (SOMARCA)

Khalid Belyazid, Secretaire general, L'economiste, Casablanca

### **Other**

Mustapha El Baze, Directeur General, Formation, Organisation et Conseil de Societies, Casablanca

Richard N. Dreiman, Directeur, Dyna I'ME, USAID/M contractor

Abdenasser Diaf, Formation, Organization & Conseil de Societes

Daissaoui Kamal, Docteur en informatique, directeur, Ecole marocaine des sciences de l'ingenieur en informatique de gestion et en informatique industrielle

Kabbage

**Karim Laraki, Directeur General, Etudes Economiques et Sociales, Rabat**

**Washington, DC**

**Allan Broehl, HERNS project**

**Roger Rasnake, HERNS project**

**Susan Ward, HERNS project**

**Kathleen M. Rose, Office of International Training, USAID/W**

**Randi Boyer, AmidEast**

**Susan M. Bouldin, Partners for International Education and Training**

**ATTACHMENT 2: DOCUMENTS****Project documents**

**Project Grant Agreement between the Kingdom of Morocco and the United States of America for Training for Development, August 19, 1991**

**Project Paper, USAID/Morocco, Training for Development, Project #608-0208, August 23, 1991**

**Memorandum of Understanding for Terms of Partnership between the Directorate of Executive Training of the Ministry of Public Works, Vocational and Executive Training; the United States Agency for International Development, and the Moroccan Training Institutions, 8 April 1994**

**USAID/Morocco, Project Implementation Report as of March 31, 1994, Training for Development**

**Award contract, USAID/M and AmidEast, December 17, 1992**

**Agreement between AmidEast and Creative Associates International, inc., January 1993**

**Training for Development Project Workplan 1993, AmidEast, 31 July 1993**

**1993 Annual Project Implementation Report, AmidEast/Training for Development Project, February 1994**

**Roughton, Richard A., Synthesis Report, April 8, 1994**

**Training for Development Project Workplan 1994-95, AmidEast, 4 July 1994**

**Morocco: Private sector training needs assessment, Final Report. Ernst & Young, Sigma Tech Ingenierie, October 1990**

**Monthly activity reports, AmidEast**

**Quarterly activity reports, AmidEast**

**AmidEast, Besoin en formation au Maroc: Rapport de synthese, Abdelghani Sbihi and Mohammed El Aouad, consultants, 6 april 1994**

**Formation de longue duree: Rapport sur les activites marketing, Younes Sbihi, consultant, January 1994**

Ministere des travaux publics de la formation professionnelle et de la formation des cadres,  
Administration de la formation professionnelle et de la formation des cadres, Reorganisation de  
l'AFPFC

### **Training evaluations and reports**

Aguirre International, Strengthening the Human Capacity Development Strategy of USAID El Salvador. HERNS Project Report, Arlington, 1994

Creative Associates International, Inc., The Impact of Training on Development: A Study of the Impact of USAID-Sponsored Training Initiatives in Swaziland. Washington, DC, November 1992.

Gilles, John A., Training for Development: Review of Experience USAID, LAC/DR/EHR, 1992

Lynton, Rolf and Udai Pareek, Training for Development, Kumarian Press.

Peuse, Gene, Measuring the Impact of HRDA Training, unpublished draft manuscript. USAID, HRDA Project Arlington, Labat-Anderson Inc. 1991.

Tejeda, Gilboy, Ndonko and Nzalli, Impact Evaluation of USAID-Sponsored Participant Training in Cameroon 1961-1993, Washington DC, AMEX International; November 1993.

**ATTACHMENT 3: AMIDEAST BUDGET AND EXPENDITURE SUMMARY**

**ATTACHMENT 4: EVALUATION SCOPE OF WORK**

## GLOSSARY

14P	14 partner institutions (of the project)
AE	AmidEast
AGEF	Association des Gestionnaires de l'Enseignement et de la Formation
AFPFC	Administration de la Formation Professionnelle et de la Formation des Cadres
CLASP	Caribbean and Latin American Scholars Program
DEnP	Direction de l'Enseignement Professionnel
DFC	Direction de la Formation des Cadres
EAS	Economic Affairs Section (...?..)
ELT	English language training
EOPS	End of project status
GDO	General Development Office
GOM	Government of the Kingdom of Morocco
HRD	Human resources development
JASC	Joint Advisory and Selection Committee
LOP	Life of project
LT	Long term
PDO	Project Development Office
PHR	Population and Human Resources
PIO/P	Project Implementation Order/Personal
PIR	Project Implementation Review
PS	Private sector
PTIS	Participant Training Information System
PTMS	Participant Information Management System
p.v.	<i>procès verbal</i> (minutes of a meeting)
RFP	Request for Proposals
ST	Short term
TA	Technical Assistance
TFD	Trainign for Development
TOR	Terms of Reference
TOT	Training of Trainers
TQM	Total Quality Management
UDLP	University Development Linkages Project
USAID/M	United States Agency for International Development in Morocco