GLOBAL TRAINING FOR DEVELOPMENT
USAID/EGYPT
QUARTERLY REPORT
APRIL 1 - JUNE 30, 1997

Delivery Order No.: 803
Effective Dates: 04/01/97 - 09/30/99
Contract Total: $1,228,000
Obligated Amount: $1,228,000

This Quarterly Report summarizes the activities of World Learning and its subcontractors (The African-American Institute, AMIDEAST, The Asia Foundation, Creative Associates International, Inc., and *Development* InfoStructure) from July 1 through September 30, 1997, for the Global Training for Development (GTD) Indefinite Quantities Contract (IQC) No. FAO-I-00-96-90020-00 with the U.S. Agency for International Development.

The report is organized chronologically by the effective dates of each Delivery Order as follows: Summary, Activities, Concerns/Constraints, and Recommended Actions. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

Through the GTD mechanism, a total of twenty-eight academic participants from Yemen and Oman were transferred from Partners for International Education and Training (PIET) to World Learning. The participants, twelve Omanis and sixteen Yemenis, are the remaining participants of the closed USAID Training Offices of USAID/Yemen and the Omani-American Joint Commission (OAJC). USAID/Egypt, the regional office charged with managing the participants through program completion, issued this Delivery Order in April 1997. AMIDEAST is the subcontractor providing personnel for the Placement Specialist, Monitoring Support Specialist and Delivery Order Manager positions in the Delivery Order. For the Quarter April 1 - June 30, 1997, monitoring and management activities were performed at the former PIET office. However, checks for participant expenses were issued by World Learning as of mid-May.

Since January 1997, participants were informed in writing and on the telephone to expect a change in program management. Several participants expressed relief that the change in program management contractors from PIET to World Learning would not be drastic, as the participants wished to continue working with staff members familiar to them. By the end of the Quarter, letters were sent to the advisers informing them of the change in contractors. Explanatory letters and new letters of Financial Certification were also sent to all university

bursar's offices. *Development* InfoStructure was informed of the change in Contractor Number so that participants' HAC records would be changed and insurance statements could be sent to World Learning for distribution to the participants..

II. ACTIVITIES

The Delivery Order is characterized by three different participant training activities:

Oman Scholarship and Training Project II (STPII) - 10 participants
Oman Fisheries Development Management - 2 participants
Yemen Development Training III - 16 participants

Oman Scholarship and Training Project II

Saada Al-Barwani, BS/Nursing, Villanova University, December 25, 1993 - May 31, 1998

Saada is currently taking classes this summer. She is a good student, and she seems to enjoy the nursing courses. Saada rents a room in a house near the university, but she is looking for a new place to live as the house will be sold. Saada does not have plans to return to Oman this summer. Cumulative GPA: 2.77. AETR received.

Sana Al-Belushi, EdD/Education - Evaluation, University of Louisville, August 31, 1994 - September 23, 1997

Sana conducted a comprehensive survey of students and teachers in Oman last year as the research component for her dissertation. Sana just completed the data entry in May and she is now analyzing the data and writing her dissertation. Sana is sure that she will complete the writing of her dissertation before her term date, but she is worried that she will not be able to complete the corrections or that an ill member of her committee will have to be replaced. Sana is an excellent student. Cumulative GPA: 3.816. AETR received.

Saada Al-Ghafry, PhD/Education - Instructional Technology, December 17, 1993 - June 30, 1997

Saada suffered from some health problems during the Spring Quarter and she did not complete as much work as she had expected. Saada's health has since improved and she is working diligently on the preparations for the research she will conduct in Oman in the Fall. Saada is a hard-working student, and expects to complete her degree program by June 1998. Cumulative GPA: 3.75. AETR received.

Sumaiya Al-Ghaithy, BS/Nursing, Villanova University, December 25, 1993 - May 31, 1998

Sumaiya was not performing well in her Nursing and Health Restoration class in the Spring 1997 term, but she passed the course with a C, the minimum grade required for a Nursing course. Sumaiya is scheduled to take a full course load this summer. Sumaiya is interested in raising her GPA. Sumaiya also expressed an interest in working and was informed that she does not have permission to work. Cumulative GPA: 2.43. AETR not yet received.

Ahmed Al-Khabouri, Phd/Public Administration, Jackson State University, August 16, 1994 - August 15, 1998

Ahmed was in Oman for four months at the beginning of the year to conduct research and write his dissertation proposal. Ahmed's dissertation proposal was accepted by his dissertation committee and Ahmed is enrolled for dissertation credits for the Summer and Fall 1997 terms. Ahmed took the oral comprehensive exams in the Spring 1997 term, but he has not yet provided programmer with a copy of the results. Cumulative GPA: 3.4. AETR not yet received.

Jamal Al-Khaduri, BS/Nursing, Villanova University, December 25, 1993 - May 31, 1999

Jamal was also struggling with his Nursing course in Spring 1997 term, but he too completed the course with a grade of C. As the Nursing program is sequential and Jamal has already completed all his undergraduate degree electives, he had difficulty enrolling in a full-time course load this summer. Jamal is scheduled to take one class, Research in Nursing, this summer. Cumulative GPA: 2.05. AETR not yet received.

Fatma Al-Lamki, BS/Nursing, Villanova University, December 25, 1993 - May 31, 1998

Fatma is in Austin, Texas with her husband, a graduate student at the University of Texas, for the summer. She reported that she would find a nursing course to take this summer in Austin, but has not yet submitted any information to programmer. Fatma also reported that her Spring 1997 grades and Fall 1997 registration are being held by Villanova University for unpaid Health Center charges dating from Spring 1996. Programmer reminded all nursing students of their outstanding Health Center charges in March 1997. Fatma will be requesting a detailed summary of the Health Center charges so that programmer may pay the OAJC-approved required clinical items. Personal health charges will be paid by Fatma. Fatma, who has lived in a dormitory since her arrival at Villanova, will live in a shared, off-campus apartment beginning in the fall. AETR not yet received.

Nada Al-Moosa, BS/Nursing, Villanova University, December 25, 1993 - May 31, 1998
Nada is currently in Oman and is expected to return on/about June 24, 1997. Nada is scheduled to take one course this summer. Nada will live in the University dormitory for the summer and then move to a single, off-campus apartment in August.

Nada is struggling with her Nursing courses and will take a required course for the third time in Fall 1997. Nada reported to programmer that she receives a lot of support from the University,

but she is simply having problems with the course materials. Nada is at least one year behind in her scheduled Nursing program and will not graduate in May 1998. AETR not yet received.

Samira Al-Rawahi, MS/Nursing, Villanova University, August 9, 1994 - May 28, 1997

Samira is currently in the U.S. Samira was reported to USAID as a non-returnee on May 28, 1997, and USAID has requested additional information from the programmer to report Samira to Immigration and Naturalization Services. The programmer has requested in writing that Samira submit any documentation to indicate that she returned to Oman and re-entered the U.S. with a new immigration status. Samira has not yet produced any documentation which could correct the non-returnee report. Samira completed her degree program and earned a cumulative GPA of 3.57.

Abdullah Al-Rubaiey, MS/Nursing, Villanova University, August 9, 1994 - May 28, 1997

Abdullah attended an exit debriefing in Washington, DC before his scheduled return to Oman on May 25, 1997. Abdullah completed his degree program and earned a cumulative GPA of 3.34.

Oman Fisheries Development Management Project

Hilal Al-Mukhaini, PhD/Resource Economics, University of Rhode Island, April 1, 1996 - September 30, 1997 (Student was transferred from another USAID contractor on April 1)

Hilal was very upset when informed that he must to return to Oman by September 30, 1997 as the time of the trip would not be convenient for him or his personal plans to return to Oman for the month of Ramadan. Hilal and the Embassy of the Sultanate of Oman have been informed that Hilal must return to Oman by September 30 to comply with USAID and immigration regulations. Hilal was encouraged to talk with his adviser and to develop a new time line which might make use of Hilal's return to Oman in October. Cumulative GPA: 3.125. AETR not yet received.

Mohammed Al-Murazza, BS/Economics, St. Louis University, April 1, 1996 - July 7, 1997 (Student was transferred from another USAID contractor on April 1, 1996)

Mohammed was scheduled to take three courses this summer, but is currently enrolled in only two courses. Mohammed will complete his course work on July 2, 1997 and plans to return to Oman on July 4. When he returns in Fall 1997 under Omani Embassy sponsorship, Mohammed will have a heavy course load to complete to graduate by the end of the term. Cumulative GPA: 2.764. AETR received.

Yemen Development Training III Project

Morheb Al-Assad, PhD/Public Administration, Jackson State University, August 18, 1993 - December 31, 1997

Morheb is scheduled to submit his dissertation proposal to his dissertation committee on June 23. He hopes that he will be able to make all corrections by the end of July so that he might conduct research in Yemen beginning in August. Morheb is well-liked by his advisers and is always very responsive to all programmer's requests. As Morheb has not even begun his dissertation research, programmer has requested approval to fund Morheb's program through a realistic term date of August 1998. Cumulative GPA: 3.813. AETR received.

Entisar Dahan, Master of Public Management (MPM)/Health Care Systems, Carnegie Mellon University, August 18, 1996 - May 31, 1998

Entisar and her husband, Ali Al-Omary, are difficult to reach by telephone so most contact is through mail or e-mail. Entisar completed her new Graduate Program of Study with information systems courses as her program electives. Programmer will discuss the situation with her adviser once again. She is enrolled for two summer courses that are required for the Health Care Systems major. Cumulative GPA: 3.83. AETR received.

Tawfeeq Al-Dubhani, Master of Public Management (MPM)/Information Systems, Carnegie Mellon University, August 3, 1996 - May 31, 1998

Tawfeeq will be completing a full-time course load before returning to Yemen at the end of June to visit his family. Tawfeeq took a class at the University of Pittsburgh in web-page making to fulfill one of his degree requirements and has recently purchased his own computer with the USAID allowance. Tawfeeq is a good student and is concerned with abiding by the rules of his scholarship. Cumulative GPA: 3.667. AETR not yet received. Participant will be asked to submit AETR before his departure. Participant will not receive July MMA as he will be out of the country.

Abdullah Al-Hamdi, Master of Public Management (MPM)/Information Systems, Carnegie Mellon University, August 3, 1996 - May 31, 1998

Abdullah is a very agreeable participant and a good student. He was disappointed to learn that he must complete his degree program earlier than he anticipated. However, Abdullah quickly completed his new Graduate Program of Study to reflect a May 31, 1998 completion date. He recently received an advance of his computer allowance. Cumulative GPA: 3.917. AETR received.

Ilham Al-Hamdi, MED/Education Leadership, George Mason University, August 12, 1996 - August 31, 1998

Ilham seems much happier now that she is attending George Mason University. She had difficulties registering for Summer 1997 courses as many courses were full or had conflicting class times. Ilham is taking one course this summer and will have to take four classes in the Spring 1998 term to make up the missed summer course and stay on track to graduate by August 1998. Cumulative GPA: 4.0 for Virginia State University. AETR not yet received; thus per USAID regulations, July MMA will be held.

Nahla Al-Huraibi, MA/Sociology, Ohio University, August 31, 1996 - December 31, 1998

Nahla is a good student because she works very hard. She is currently in the Spring 1997 Quarter taking a full-time load of two courses. Nahla was very pleased to learn that she can take an English course to provide a firmer foundation for her written and spoken English. Nahla is required to write a thesis as part of her degree program, and will need through December 1998 to complete. Cumulative GPA: 3.890. AETR for Winter Quarter not yet received; thus per USAID regulations, July MMA will be held.

Lamis Al-Iryani, Master of Public Administration, Kentucky State University, August 15, 1995 - December 31, 1997

Lamis is interning at an insurance company for the required internship component of her degree program. Lamis reported that she is learning about the database for the company and hopes to learn a lot from the experience. Programmer's review of Lamis' course of study indicates that Lamis must complete one more course, one more internship component, and pass her comprehensive exams during the Fall 1997 term. Lamis will be attending the American Society for Public Administration annual conference at the end of July. Cumulative GPA: 3.917. AETR received.

Adnan Ismail, PhD/Physics, University of Massachusetts-Lowell, August 14, 1991 - December 31, 1997

Adnan has mentioned several times that his employer would like for him to do some practical training after his degree program. Adnan has been informed that practical training after his degree program will not be permitted. Adnan will be presenting a group paper to a conference in Milwaukee, Wisconsin at the end of July.

Adnan is an excellent student. He is working diligently to complete his degree program by December 1997, but there are many factors which may prevent his completing the degree program on time. Programmer has requested that Adnan's funding be extended through August 31, 1998 to allow him adequate time to complete a difficult degree program. July MMA will be held because AETR and grade report have not yet been received..

Ishrak Al-Kershi, Master of Public Management (MPM)/Human Resource Management, Carnegie Mellon University, August 3, 1996 - May 31, 1998

Ishrak is a good student. She was also upset to learn that she would be required to complete her degree program by May 31, 1998. She recently returned her new Graduate Program of Study in which she indicates that she will audit classes that interest her at no cost to USAID. Ishrak recently received a computer advance to purchase her own computer. Cumulative GPA: 3.804. AETR received.

Ali Al-Omary, Master of Public Management (MPM)/Financial Management, Carnegie Mellon University, August 19, 1996 - May 31, 1998

Ali indicated on his Graduate Program of Study (GPOS) that he would complete his degree program by December 1997. Programmer reviewed the GPOS and the course load that Ali has actually taken since his arrival and estimates that Ali will realistically need through May 31, 1998 to complete his program. Ali and his wife, Entisar Dahan, will complete their degree programs at the same time. Cumulative GPA: 3.53. AETR received.

Anwar Al-Sanabani, MS/City & Regional Planning, Morgan State University, September 3, 1996 - December 31, 1998

Anwar was informed of Mission's requirements for the approval of his dependents to join him in the U.S. over the phone as well as in writing. However, programmer has not been able to contact Anwar for almost a month, nor has Anwar responded to urgent written requests for his AETR or grade report. Programmer will continue efforts to locate him and will apprise mission. AETR and grade report not received; thus per USAID regulations the July MMA will be held.

Mohamed Shamsuddin, MS/Public Health, University of Arizona, August 10, 1996 - August 31, 1998

Dr. Shamsuddin opted to take a summer course that was particularly interesting to him and directly related to his degree program. Dr. Shamsuddin is detailed and thorough in all his communications with programmer and is an excellent student. Cumulative GPA: 3.83. AETR received.

Amatalwali Al-Sharki, MS/Engineering Management, University of Dayton, September 1, 1995 - August 31, 1997

Amat will complete her degree program by the end of the summer. Although Amat was not pleased to learn that she must rush through her final project, she has had the opportunity to work with the project adviser of her choice and will complete a good project. Amat has done well in her program. Cumulative GPA: 3.22. Fall 1996 and Winter 1997 AETRs received.

Mohamed Al-Ward, MS/City & Regional Planning, Morgan State University, August 22, 1995 - December 31, 1997

Mohamed's family arrived the day after he completed his Spring 1997 term and he was busy visiting with them during the break between Spring and Summer sessions. Mohamed is currently taking a course in supervised research to help him develop his thesis topic. Cumulative GPA: 3.857. AETR received.

Musad Al-Ward, MS/Computer Science - System Management, Clark Atlanta University, December 23, 1995 - December 31, 1997

Musad is an excellent student who loves to learn. He is currently taking mission-approved computer courses this summer. Musad was able to persuade the computer company to provide him with the opportunity to take more classes at a reduced cost to himself. Musad has also completed his technical project and is waiting for his adviser's comments. Musad only has

course work to complete in the Fall 1997 term and he should have no difficulty in completing his degree program by December 31, 1997. Because the AETR and grade report have not yet been received, the July MMA will be held.

Tariq Yahya, MS/Statistics, Iowa State University, August 20, 1996 - December 31, 1998

Dr. Isaacson, Tariq's adviser, clarified his comments on Tariq's Spring 1997 Academic and Enrollment Report after the most recent e-mail to Mission. Dr. Isaacson informed programmer that Tariq received a 3.0 cumulative GPA in the Spring 1997 term because the university included the English grade. Dr. Isaacson agreed that Tariq improved his performance in Statistics, but he is still weak in the area of Statistics. Tariq will take two math courses this summer to improve his math base and prepare him for the Fall 1997 theory courses. Dr. Isaacson explained that Tariq will be repeating a math course taken in Fall 1997, and his new grade will replace the original grade of C-.

Tariq is probably the weakest of all the Yemeni students, but he is a hard worker and is dedicated to his degree program. Tariq has just received an advance for his computer allowance; he plans on purchasing a notebook computer. Tariq was ready to purchase a computer earlier in the year, but we suggested that he wait to complete the Spring 1997 term. Cumulative GPA: 3.0. AETR received.

III. CONCERNS/CONSTRAINTS

The physical transfer of files and of one staff person from PIET to World Learning had to be well-coordinated to ensure that very little time was wasted in moving. There was also a concern that institutional knowledge regarding academic training would be lost with the close of PIET.

IV. RECOMMENDED ACTIONS

World Learning made arrangements for space and computer connections for the Placement/ Monitoring and Support Specialist, Ms. Mitchell, prior to the scheduled move from PIET to World Learning. Furthermore, PIET's information regarding academic training was reviewed. Relevant information and forms were kept by Ms. Mitchell and brought to World Learning as reference materials.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/EGYPT
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 803
Effective Dates: 04/01/97 - 09/30/99
Contract Total: $1,228,000
Obligated Amount: $1,228,000

This Quarterly Report summarizes the activities of World Learning and its subcontractors (The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure) from July 1 through September 30, 1997, for the Global Training for Development (GTD) Indefinite Quantities Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 803, with the U.S. Agency for International Development.

The report is organized as follows: Summary, Activities, Concerns/Constraints, and Recommended Actions. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

Through the GTD mechanism, a total of twenty-eight academic participants from the Republic of Yemen and the Sultanate of Oman were transferred from Partners for International Education and Training (PIET) to World Learning. The participants, twelve Omanis and sixteen Yemenis, are the remaining participants of the closed offices of USAID/Yemen and the Omani-American Joint Commission (OAJC). USAID/Egypt is the regional office charged with managing the participants through program completion.

During the Quarter July 1 through September 30, 1997, all participant files and activities were transferred from PIET to World Learning's GTD office. Contact with participants during the transfer was maintained by update letters before and after the transfer, and detailed voice-mail messages at both the PIET and World Learning telephone numbers.

All participant information and participant budgets were entered into the World Learning GTD Information System (GTDIS). The contractor identification number for the HAC insurance was changed and all HAC statements are now being sent to World Learning for forwarding to the academic participants. Participants were provided with new insurance coverage information in July 1997, with the change in HAC plans.

II. ACTIVITIES

Oman Scholarship and Training Project II

Saada Al-Barwani, BS/Nursing, Villanova University, December 25, 1993 - May 31, 1998

Saada found an apartment that is within walking distance of the university. Saada submitted a detailed listing of Health Center charges for which she paid, clearing her student account. Saada was reimbursed for the OAJC-approved required clinical exam expenses, and was encouraged to submit the regular charges to HAC for reimbursement. Without informing World Learning-AMIDEAST prior to her departure, Saada returned to Oman for one month during the summer. Saada, who has previously requested Mission approval for her travel home, was not provided with a month's allowance. Saada was also reminded that she still needs Mission approval for her travel. Cumulative GPA: 2.77. AETR received.

Sana Al-Belushi, EdD/Education - Evaluation, University of Louisville, August 31, 1994 - December 31, 1997 (Extension period: September 24-December 31, 1997)

Sana was very relieved to hear that her program had been extended. At the time of the extension request, Sana was close to finishing her dissertation, but was unsure if the dissertation defense and corrections would move quickly. Sana successfully defended her dissertation on September 30, 1997, and made plans to return to Oman by mid-October. Cumulative GPA: 3.764. AETR received.

Saada Al-Ghafry, PhD/Education - Instructional Technology, December 17, 1993 - September 30, 1997 (Extension period: July 1 - September 30, 1997)

Saada was happy that she received an extension of her program to allow her to complete and defend the dissertation proposal before traveling to Oman to conduct dissertation research. During the extension period, Saada continued to report that she was near completion of the dissertation proposal and its defense. However, as of September 30, Saada was not done, nor was she ready to return to Oman to begin her dissertation research. Saada was advised to return to Oman as soon as possible. The Omani Embassy began funding Saada effective October 1, 1997.

Sumaiya Al-Ghaithy, BS/Nursing, Villanova University, December 25, 1993 - May 31, 1998

Sumaiya reported that she is maintaining a C average in her nursing class. Sumaiya is ever confident that she is doing well, and will improve her GPA. She shares a room in a house with a nursing student sponsored by the Omani Embassy. Cumulative GPA: 2.57. AETR received.

Ahmed Al-Khabouri, PhD/Public Administration, Jackson State University, August 16, 1994 - August 15, 1998

Ahmed did not respond to a written request for the results of the comprehensive exam taken in the Spring 1997 term, or to letters requesting that he contact World Learning-AMIDEAST. Calls made throughout the summer to his most recent telephone number were unanswered. Letters mailed in August and September to his last address were returned. Ahmed's adviser, Dr. Moreland-Young was away from the University much of the summer. When finally reached in late September, Dr. Moreland-Young reported that Ahmed had returned home in June, but was expected to return by September 30 to repeat sections of the comprehensive exam.

Jamal Al-Khaduri, BS/Nursing, Villanova University, December 25, 1993 - May 31, 1999

Jamal is now sharing an apartment with a roommate. Jamal did not perform well during the Spring 1997 semester. However, he received a solid B in his single summer course, "Research in Nursing", improving his GPA slightly. Cumulative GPA: 2.10. AETR received.

Fatma Al-Lamki, BS/Nursing, Villanova University, December 25, 1993 - May 31, 1998

Fatma did not take classes while in Austin, Texas with her husband this summer. However, Fatma did submit a detailed bill of her Health Center charges. OAJC-approved required clinical expenses were paid for by World Learning-AMIDEAST; personal health charges were submitted to HAC insurance or were paid for by Fatma. Fatma stated that she enjoys living in an apartment with two other girls, where she does have her own room. Cumulative GPA 2.73. AETR received.

Nada Al-Moosa, BS/Nursing, Villanova University, December 25, 1993 - May 31, 1998

Nada enjoys living in her own apartment. Nada paid her outstanding Health Center charges, but has not been able to get a detailed listing of the expenses. Once the detailed bill is received, World Learning-AMIDEAST will reimburse Nada for charges that were for OAJC-approved required clinical expenses. Nada seems more confident about her coursework this term. Cumulative GPA: 2.25. AETR received.

Samira Al-Rawahi, MS/Nursing, Villanova University, August 9, 1994 - May 28, 1997

Samira completed her degree program and earned a cumulative GPA of 3.57. Samira was reported as a non-returnee to USAID/Washington on May 28, 1997.

Abdullah Al-Rubaiey, MS/Nursing, Villanova University, August 9, 1994 - May 28, 1997

Abdullah attended an exit debriefing in Washington, DC before his scheduled return to Oman on May 25, 1997. Abdullah completed his degree program and earned a cumulative GPA of 3.34.

<u>Oman Fisheries Development Management Project</u>

Hilal Al-Mukhaini, PhD/Resource Economics, University of Rhode Island, (PIET pick-up) April 1, 1996 - September 30, 1997

Hilal traveled to Oman in August 1997. He returned to the US in September on an Omani Embassy visa and IAP-66. Hilal submitted all his immigration documents to World Learning-AMIDEAST; his documents were correctly processed. He will complete his doctoral degree under Omani Embassy sponsorship.

Mohammed Al-Murazza, BS/Economics, St. Louis University, (PIET pick-up) April 1, 1996 - July 7, 1997 (Extension period July 1-7, 1997)

Mohamed completed his Summer 1997 term and returned to Oman on July 4, 1997 for the summer break. He will complete his BS degree under Omani Embassy sponsorship.

Yemen Development Training III

Morheb Al-Assad, PhD/Public Administration, Jackson State University, August 18, 1993 - August 31, 1998 (Extension period: January 1 - August 31, 1998)

Morheb was extremely pleased to hear that he received an extension through August 1998 before he departed for Yemen to conduct Mission-approved dissertation research on August 30. He was very diligent in providing all the necessary information to obtain Mission approval for his dissertation research trip to Yemen. Morheb's adviser, Dr. McDonald was also very cooperative in providing letters in support of the research and the extension. Cumulative GPA: 3.82. AETR received.

Entisar Dahan, Master of Public Management (MPM)/Health Care Systems, Carnegie Mellon University, August 18, 1996 - May 31, 1998

Entisar is enrolled in information systems courses this Fall. Entisar's adviser, Dr. Robert Pearson, confirmed that Entisar has either already taken the few health systems courses offered this Fall, or the courses offered are not applicable to Entisar's program. Dr. Pearson also stated that computers are used in managing health care systems, and that it will be invaluable for Entisar to pursue some coursework in information systems. Entisar has chosen to attend the Management-Communication for Development seminar offered by the Management Training and Development Institute (MTDI) during the Carnegie Mellon winter break. Cumulative GPA: 3.87. AETR received.

Tawfeeq Al-Dubhani, Master of Public Management (MPM)/Information Systems, Carnegie Mellon University, August 3, 1996 - May 31, 1998

Tawfeeq purchased a computer with the allowance provided by USAID. He attended a course in the development of web pages this summer. For his class project, Tawfeeq created an interesting web page with pictures of Yemen and links to related sites. Upon returning from his Mission-approved, personal travel to Yemen this summer, Tawfeeq moved to a new apartment. Cumulative GPA: 3.67. AETR received.

Abdullah Al-Hamdi, Master of Public Management (MPM)/Information Systems, Carnegie Mellon University, August 3, 1996 - May 31, 1998

Abdullah attended a professional conference on distributed computing August 21 -24, just before the start of the Fall 1997 term. Abdullah was glad to have the opportunity to attend the conference. Abdullah had returned the first computer he purchased with the computer advance. He waited about six weeks for a refund because he paid for the original computer by personal check. Abdullah purchased the final computer in late August 1997, and submitted the original receipt to World Learning. Abdullah also moved to a new apartment in August 1997. Cumulative GPA: 3.98. AETR received.

Ilham Al-Hamdi, MED/Education Leadership, George Mason University, August 12, 1996 - August 31, 1998

Ilham moved to a new apartment in August. Ilham reported that she is enjoying her coursework this Fall. Ilham requested a student membership in the American Society for Curriculum and Development (ASCD). Ilham has been encouraged to consider attending the annual ASCD conference as her professional meeting. As for the MTDI seminar, Ilham has indicated that she would prefer to attend a seminar in Summer 1998, when the seminars are offered in Washington, DC. Cumulative GPA: 4.0. AETR received.

Nahla Al-Huraibi, MA/Sociology, Ohio University, August 31, 1996 - December 31, 1998

Nahla is taking a full-time course load of two courses in Ohio University's quarter system. Nahla admits that she does not try as hard as she should to speak English at all times; she speaks Arabic at home with her husband. Nahla reported that attended an English course for several days, but she did not enroll in the course because she did not find the information helpful. Nahla purchased a computer earlier in the year, and has been typing her own papers. Previously, Nahla had all her papers typed for her. Cumulative GPA: 3.89. AETR received.

Lamis Al-Iryani, Master of Public Administration, Kentucky State University, August 15, 1995 - December 31, 1997

Lamis reported that she received a final grade of A in the Public Sector Economics course, which replaces the Incomplete that was listed on her Summer 1997 grade report. Lamis inquired about the possibility of practical training after she graduates in December 1997, as she was offered a temporary position with her host for the university-required internship. Lamis was informed that

practical training after the degree program is not permitted. At the end of July, Lamis attended the American Society for Public Administration annual conference. Lamis reported that she was glad to have the opportunity to attend the conference and meet so many people in her field. Cumulative GPA: 3.923. AETR received.

Adnan Ismail, PhD/Physics, University of Massachusetts-Lowell, August 14, 1991 - August 31, 1998 (Extension period: January 1 - August 31, 1998)

Adnan was pleased to hear that he had received an extension until August 1998. He also stated that his current internship with Massachusetts General Hospital does not demand much of his time, and that the internship itself can easily be stopped at any time. Adnan reported that he is receiving credits for the internship. Adnan will be required to write a brief report about his experience. Cumulative GPA: 4.0. AETR received.

Ishrak Al-Kershi, Master of Public Management (MPM)/Human Resource Management, Carnegie Mellon University, August 3, 1996 - May 31, 1998

Ishrak purchased a computer in August 1997 with her computer allowance. She requested a student membership in the Society for Human Resource Management in an effort to learn as much as she can about human resources. Ishrak has not yet decided if she will attend a MTDI seminar during the winter break. Cumulative GPA: 3.73. AETR received.

Ali Al-Omary, Master of Public Management (MPM)/Financial Management, Carnegie Mellon University, August 19, 1996 - May 31, 1998

Ali's adviser, Dr. Faulk, confirmed that Ali will need until May 1998 to complete the degree program. Dr. Faulk also confirmed that Ali has taken approved substitutes for core courses, and is working steadily towards degree completion. Ali has chosen to attend the Management-Communication for Development seminar offered by MTDI with his wife, Entisar Dahan, during the winter break. Cumulative GPA: 3.62. AETR received.

Anwar Al-Sanabani, MS/City & Regional Planning, Morgan State University, September 3, 1996 - December 31, 1998

Anwar contacted World Learning in July, after a period of no communication. Anwar reported that he was in the United States. However, as Anwar was unwilling to submit his passport for verification of the date on the I-94 card, Anwar was not provided with two months of allowance. Anwar was visited on September 29 during a formal campus visit to Morgan State University. Cumulative GPA: 3.65. AETR received.

Mohamed Shamsuddin, MS/Public Health, University of Arizona, August 10, 1996 - August 31, 1998

Dr. Shamsuddin continues to do well in his current program. Always thinking ahead, Dr. Shamsuddin provided the information necessary to attend the November meeting of the American Public Health Association in August. He is registered for the conference. Cumulative GPA: 3.875. AETR received.

Amatalwali Al-Sharki, MS/Engineering Management, University of Dayton, September 1, 1995 - August 5, 1997

Amat completed her degree program and returned to Yemen on August 5, 1997. Cumulative GPA: 3.42.

Mohamed Al-Ward, MS/City & Regional Planning, Morgan State University, August 22, 1995 - December 31, 1997

Mohamed is working towards completing his degree program in December 1997. Mohamed's work was praised by his adviser during the campus visit conducted on September 29, 1997. Cumulative GPA: 3.867. AETR received.

Musad Al-Ward, MS/Computer Science - System Management, Clark Atlanta University, December 23, 1995 - December 31, 1997

Musad took a number of computer courses this summer. Musad is currently working to complete the remaining two courses in his degree program. He is scheduled to graduate in December 1997. Cumulative GPA: 4.0. AETR received.

Tariq Yahya, MS/Statistics, Iowa State University, August 20, 1996 - August 31, 1997

Mr. Yahya reported that his health was suffering from the stress of studying too much. Mr. Yahya also reported that he was very disappointed with his performance during the Summer 1997 term. Mr. Yahya requested that his scholarship be terminated for health reasons. Mr. Yahya's adviser confirmed that Mr. Yahya's health had deteriorated during the summer and that Mr. Yahya would be taking even harder classes this Fall. USAID/Yemen approved Mr. Yahya's request for self-termination. Mr. Yahya was given a return ticket for departing the US on August 30. Mr. Yahya rescheduled his departure for October 8 to accommodate personal travel. Cumulative GPA: 2.99.

C. CONCERNS/CONSTRAINTS

It has been difficult to get a correct HAC insurance bill. World Learning has been informed that *Development* InfoStructure is working with Acordia Healthcare Solutions to resolve this issue. Please note that participants' HAC coverage has not been affected in any way by the billing problems.

The Delivery Order requires a programming staff person only four days a week. There was a concern that the participants would notice and be adversely affected by the loss of one programming day.

D. RECOMMENDED ACTIONS

- World Learning has been proactive in requesting regular and accurate billing for HAC insurance. Ms. Mitchell, the Placement/Monitoring and Support Specialist, will remain vigilant in making sure the correct information is being transmitted to USAID for HAC enrollments, to ensure that billing will be accurate when it occurs.

- To maintain contact with participants, communication through e-mail was encouraged at every opportunity. However all the students, except the ones with previous computer experience, prefer the more personal feeling of a telephone call. Participants will be reminded that e-mail is an easy way to be in constant contact with their Monitoring and Support Specialist.

- Ms. Mitchell's voice-mail message is also changed daily to assist participants and other clients in contacting World Learning. E-mail is checked regularly, even on the day that the Ms. Mitchell is not scheduled to be working under the Delivery Order. Every effort is made to respond to participant requests quickly, and to be in touch with the participants on a regular basis.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/KENYA
QUARTERLY REPORT
APRIL 1 - JUNE 30, 1997

Delivery Order No.: 804
Effective Dates: 04/01/97 - 05/31/98
Contract Total: $508,790
Obligated Amount: $508,790

This Quarterly Report summarizes the activities of World Learning and its subcontractors (The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure) from July 1 through September 30, 1997, for the Global Training for Development (GTD) Indefinite Quantities Contract (IQC) No. FAO-I-00-96-90020-00 with the U.S. Agency for International Development.

The report is organized chronologically by the effective dates of each Delivery Order as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions. Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

In April 1997, USAID/Kenya issued this Delivery Order for assistance in placement, management, and follow-on programming of approximately 35 participants into U.S. short-term training programs each estimated to be an average of five weeks in duration. The objective of the training is to assist USAID/Kenya to achieve its goal of broad-based sustainable economic growth. Specifically, training is expected to contribute substantially to three USAID/Kenya Strategic Objectives (SO):

- SO1: Creation of Effective Demand for Sustainable Political, Constitutional, and Legal Reform [12 participants];
- SO2: Increased Commercialization of Smallholder Agriculture [13 participants]; and,
- SO3: Increased Sustainability of Family Planning and HIV/AIDS Service Delivery Systems [10 participants].

II. ACTIVITIES

The Kenya Delivery Order is World Learning's first GTD Delivery Order in Africa following award of the IQC. From April through June, GTD placement and monitoring services for Africa were physically provided from the former Partners for International Education and Training (PIET) office in Washington, DC.

At a total program cost of about $195,855, 20 participants were programmed to receive a total of about 21 months of training, which is equivalent to about $9,800 per participant for slightly greater than four weeks of training each, detailed as follows:

SO1, Creation of Effective Demand for Sustainable Political, Constitutional, and Legal Reform:

No. Participants to Be Trained	No. Participants Trained	Activity/Type of Training
2	2	Democracy, Civic Participation and Public Policy Training for NGOs
5	5	Legislative Training
2	0	Human Rights and Democracy
3	2	Management Training
12	9	Total SO1

SO2, Increased Commercialization of Smallholder Agriculture:

No. Participants to Be Trained	No. Participants Trained	Activity/Type of Training
3	1	Financial Management of Micro Finance Institutions
2	0	Micro Finance Services and Implementation
2	0	Eco-Tourism
2	1	Monitoring and Evaluation
2	0	Micro Enterprise Services Delivery
2	0	Biodiverse Conservation
13	2	Total SO2

SO3, Increased Sustainability of Family Planning and HIV/AIDS Service Delivery Systems:

No. Participants to Be Trained	No. Participants Trained	Activity/Type of Training
1	1	Sexuality Education, HIV/AIDS Prevention,

		Reproductive Health Care
2	1	Implementing AIDS Programs
3	2	Adolescent Health Promotion
4	2	Family Planning Program Management and Supervision
0	2	Population and Census Management and Computer Tools
0	1	Management Information Systems for Health
10	9	Total SO3

Note: For SO3, 10 trainees in the first four types of activities were projected; 6 have attended training in those areas. In addition, 3 participants have been nominated for topics beyond those originally projected, as indicated.

The participant budget for this delivery order is $464,905, which equates to about $13,283 per participant for 35 participants. The average training cost of each of the 20 participants programmed was approximately $9,800 (including minor fees incurred for canceled trainees, such as cashier's check fees and pre-paid airline ticket fees), which is about $3,500 less per participant than estimated in the proposed budget. The lower actual costs may be attributed to cost savings realized through lower Washington, DC per diem rates than projected, bundling the purchase of airline tickets (international and U.S. portions of flights), and the fact that participants have not been coming to DC for orientations (an orientation fee, per diem, and air travel costs to DC were all included in the proposed budget). Thus, there are sufficient funds in the participant budget to program the remaining 15 participants originally projected plus possibly additional participants.

PROGRAM HIGHLIGHTS:

International Policy Advocacy Training

Ms. Marren Akatsa and Mr. Charles Oyaya, International Policy Advocacy, School for International Training, Washington, DC, New York, NY, and Brattleboro, VT, June 7 - July 3, 1997

Summary: Participants attended a three-week workshop offered by World Learning's School for International Training. According to training provider literature, the program provides a hands-on, practical approach to learning the key advocacy concepts and skills NGOs need to influence policies of the United Nations, World Bank, and other international institutions as well as the agencies of the U.S. Government concerned with global policies. Participants had a number of field visits in Washington, DC, New York City, and Brattleboro, VT. Participants visited the UNDP, the UN General Assembly, the World Bank, the IMF, the Inter-American Development Bank, USAID, InterAction, Bread for the World, RESULTS, Church World Service, the Human Rights Watch and

numerous other government agencies and NGOs. Participant feedback on the quality and content of this training program was positive.

Lessons Learned: Participants were in a number of different sites during this exciting training program. USAID per diem regulations require participants to be advanced per diem for lodging and that this advance be reconciled with receipts or that the exact cost of lodging be paid directly. Lodging was arranged by the training provider in each site. In some cases, it was possible for participants to share rooms; in others, it was not. In addition, one Kenyan participant stayed with relatives at times and thus had no lodging cost for those nights. These factors, coupled with the fact that the hotels arranged by the training provider waived US taxes, made reconciling the participants' receipts very difficult. Ultimately, the participants ended up being overpaid; the lodging amount World Learning/AAI advanced the participants was over the amount of their receipts. A fax with a full explanation of the participants' payments, receipts, receipt reconciliation and overpayment was sent to the Mission on October 20 along with a request for the Mission's assistance in collecting the overpayment for lodging from the participants. A response on the status of the Mission's success in collecting the participant overpayments is still pending.

World Learning/AAI arranges for hotels to invoice World Learning directly for participant lodging costs, whenever possible. When not possible (such as in this case), World Learning/AAI endeavors to determine and to pay participants in advance the exact lodging cost, based on information from the training provider and the lodging sites. World Learning/AAI may also withhold a final portion of the participants' per diem until their receipts are reconciled. Receipt reconciliation normally occurs during an exit debriefing in the World Learning GTD office. In the case of this particular group, the participants departed directly from Vermont; hence, receipt reconciliation was not possible prior to their departure.

1997 International Legislative Drafting Seminar

Mr. George Kanyi Kimondo, Ms. Ann Kariuki, Mr. Lawrence Mute, Mr. Charles Wambugu, and Mr. Erastus Wamugo, 1997 International Legislative Drafting Seminar, Loyola and Tulane Public Law Center, New Orleans, LA, June 16 - June 27, 1997

Summary: A group of five participants, including four men (one of whom is blind) and one woman, attended the 1997 International Legislative Drafting Seminar held in New Orleans, LA. They were the largest group to attend training thus far under this Delivery Order. Given the size of this group, AAI's Placement and Monitoring Specialist, Randall Blandin, conducted an on-site evaluation of this program on the last day of the course, where he met with course organizers and the participants. For additional information on this program, please refer to the evaluation summary (Attachment 1 to this report).

Lessons Learned: During the on-site evaluation, the participants commented that they had a long layover in London at Gatwick International Airport. Some of the participants commented that they would have preferred that their flight to the U.S. to have been

broken up and to have had a full night's layover in London to stay at a hotel for a full night. The participants implied they would have preferred this, but would also have wanted their layover costs to have been covered by their employer or the Mission. Regarding the course content, the participants seemed extremely satisfied with the quality and content of the training. One of their primary recommendations was for the training provider to include more lecturers from diverse (non-Western) cultures.

III. CONCERNS/CONSTRAINTS

A. Administrative Issues

This Delivery Order does not incorporate the annual multiplier and cost of living (COLA) increases set forth under the terms and conditions of the prime contract, Part I, Section B.3(a)(1), as amended via Modification No. 1. To correct this oversight, World Learning will prepare a revised budget for USAID/Kenya's review. World Learning will submit a proposed revised budget to USAID, incorporating the annual increase in the multiplier and COLA, by December 1, 1997.

At this time, it also should be noted that the level of effort (LOE) under this Delivery Order is being expended at a slightly greater rate than budgeted. Specifically, in the placement and monitoring of 20 participants (57 percent of the estimated total number of participants), about 60 percent of the programming team's LOE has been utilized. However, in the long run, owing to the effort expended on the three canceled programs as well as that required to close out the files of 35 participants, it is now estimated that a modest increase in LOE may be necessary. World Learning will keep USAID/Kenya apprised of the possible need for an increase in LOE.

B. Participant Issues

The Statement of Work, Programming and Placement section set forth in the Delivery Order specifies that:

> "In addition to the basic placement considerations of cost and quality, the contractor shall arrange for at least 10% (sic) of U.S.-bound trainees' annual, aggregate training time to occur in Historically Black Colleges and Universities (HBCUs)."

To meet this requirement, three to four of the pending 15 participants should attend training at an HBCU. World Learning/AAI will recommend HBCU placements for upcoming training to meet this requirement.

Finally, to reiterate an issue raised in the Program Highlights section of this report, there are occasions when a per diem advance must be made to a participant to cover lodging expenses. Unfortunately, for a variety of reasons, sometimes it is not possible to reconcile the advance against receipts prior to the participant's departure from the U.S. When this happens, World Learning/AAI is compelled to request the assistance of the Mission to collect any per diem overpayments from participants in-country.

IV. RECOMMENDED ACTIONS

The World Learning team has the following recommendations:

- That future participants be ticketed through Washington, DC for a full day of orientation and administrative briefing;

- That information regarding per diem regulations, which is included in the training implementation plan (TIP), be reviewed in the Mission orientation with participants, so that participants are fully aware of the terms of their USAID training award and their responsibilities as they relate to per diem issued;

- That the Democratization and Leadership short course for SO1 participants, as previously proposed by World Learning/AAI, be approved (This course is offered by The Mississippi Consortium for International Development (MCID), including Jackson State University.);

- That this Delivery Order budget be modified to include the change in multiplier and COLA, as allowed under the GTD prime contract as amended;

- That, since actual program costs per participant have been less than anticipated, USAID/Kenya consider increasing the number of projected participants trained under this Delivery Order, which will require an amendment to incorporate an increase in the administrative budget; and,

- That USAID/Kenya advise World Learning/AAI on the status of the Mission's collection of per diem overpayments for participants Marren Akatsa and Charles Oyaya.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/KENYA
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 804
Effective Dates: 04/01/97 - 05/31/98
Contract Total: $508,790
Obligated Amount: $508,790

This Quarterly Report summarizes the activities of World Learning and its subcontractors (The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure) from July 1 through September 30, 1997, for the Global Training for Development (GTD) Indefinite Quantities Contract (IQC) No. FAO-I-00-96-90020-00 with the U.S. Agency for International Development.

The report is organized chronologically by the effective dates of each Delivery Order as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions. Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

A. SUMMARY

In April 1997, USAID/Kenya issued this Delivery Order for assistance in placement, management, and follow-on programming of approximately 35 participants into U.S. short-term training programs each estimated to be an average of five weeks in duration. The objective of the training is to assist USAID/Kenya to achieve its goal of broad-based sustainable economic growth. Specifically, training is expected to contribute substantially to three USAID/Kenya Strategic Objectives (SO):

- SO1: Creation of Effective Demand for Sustainable Political, Constitutional, and Legal Reform [12 participants];
- SO2: Increased Commercialization of Smallholder Agriculture [13 participants]; and,
- SO3: Increased Sustainability of Family Planning and HIV/AIDS Service Delivery Systems [10 participants].

B. ACTIVITIES

1. Observational Study Tour - Human Resource Development Management

Mr. Wanjala Wa Muricho, Observational Study Tour, American Society for Public Administration Conference (ASPA), Philadelphia, PA, July 26 - July 30, 1997; American Consortium for International Public Administration (ACIPA), The ATLAS Group International, and others (see below), July 30 - August 15, 1997

a. Summary

World Learning/AAI arranged a three-week observational study tour for Mr. Wanjala Wa Muricho, Head of the Human Resources Development Division, Directorate of Personnel, Government of Kenya. Mr. Muricho first attended a four-day conference of the American Society for Public Administration in Philadelphia, PA. Upon conclusion of the conference, the participant came to Washington, DC for an administrative briefing with The African-American Institute staff. Mr. Muricho indicated the conference was very interesting and beneficial. He then had professional meetings arranged by World Learning/AAI with the AFL-CIO, Human Resource Development Institute, and the President of the ASPA.

The participant then had a week-long program arranged by the head of the American Consortium for International Public Administration (ACIPA), Ms. Dona Wolf, former Director of Training for the Office of International Training, USAID. Ms. Wolf arranged several meetings for Mr. Muricho, including: the National Academy of Public Administration; the Pension Guaranty Corporation; the American Society for Training and Development; the Management Development Center, U.S. Office of Personnel Management, among others.

During the week of August 11, the participant attended a series of professional meetings arranged by Collette Oberlin of Atlas Group International. Ms. Oberlin, formerly with the Graduate School, USDA, arranged a series of meetings for Mr. Muricho, including meetings with representatives of the Graduate School, USDA; Dr. Matthew Henrikson, professor of management at the University of Southern California; the U.S. Department of Agriculture; and others.

b. Lessons Learned

World Learning/AAI met with Mr. Muricho for a debriefing on August 15, the conclusion of his training program. The participant was very upbeat about the quality and content of the training He commented that he was especially interested to learn how U.S. Government agencies train personnel, and to learn about training facilities and training methodologies. The participant commented that it might be desirable for future study tours like this one to include more than one participant.

C. CONCERNS/CONSTRAINTS

D. RECOMMENDED ACTIONS

GLOBAL TRAINING FOR DEVELOPMENT
USAID/GHANA
QUARTERLY REPORT
APRIL 1 - JUNE 30, 1997

Delivery Order No.: 800
Effective Dates: 04/03/97 - 09/30/98
Contract Total: 582,605
Obligated Amount: 582,605

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors, The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure from July 1, 1997 through September 30, 1997 under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 800, with the U.S. Agency for International Development.

The report is organized as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions**. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

Following a proposal preparation, submission and contract negotiation period with the World Learning team from January through March, USAID/Ghana through REDSO/WCA signed, in April 1997, an initial Delivery Order for six months of services. This Delivery Order, from April 3, 1997 through September 30, 1997, supports two of the Mission's four Strategic Objectives (SOs), health and primary education. For each of these two SOs, the Mission originally requested GTD contractor assistance to conduct a training needs assessment and design a country training plan. The Delivery Order also called for placement, monitoring, management, follow-on programming and reporting of 35 short term participants for U.S. training and 16 participants for third country training, to complement the in-country planning services. The Mission proposed training in the following subject areas:

SO2: Increased Effectiveness of the Primary Education System (10 U.S. and 6 Third Country participants)

Mission-Proposed Training Subjects:
- Educational Policy
- Decentralization
- Low cost learning materials
- Distance learning
- Supervision

SO3: Improved Family Health (25 U.S. and 10 Third Country participants)
Mission-Proposed Training Subjects:
- Program and Project Management
- Laboratory Methods and Techniques
- HIV/AIDS test counseling
- Surveillance and Applied Epidemiology for HIV/AIDS
- Laboratory Diagnosis of HIV/AIDS
- Health Care Financing
- Research, Evaluation and Monitoring
- Family Planning, Family Health Communication
- Gender Analysis Management/Role of Women

FP Management for Senior Level Managers
FP Logistics Training
Adolescent Training Programs
Social Marketing for Change
Planning and Management
Training Methods

REDSO/WCA issued Modification No. 1 to authorize the World Learning team to pay participant allowances for the U.S. trainees and to add funds accordingly. In this modification, responsibility for administering this Delivery Order was transferred from REDSO/WCA to the USAID/Ghana Contracting Officer. This modification was completed on June 19, effective from May 30.

Note: Based on Modification No. 2, it is the contractor's current understanding that in-country planning services for training needs assessment and training plan development are no longer requested under this GTD contract for SO3, Improved Family Health. Also, SO2 requested 2 more U.S. placements, for a total of 12 rather than 10.

II. ACTIVITIES

Following the signing of the Delivery Order on April 3, work commenced May 13, when World Learning/AAI received the first 20 participant nominations from the Mission for SO3 Health: 16 for U.S. courses, four for Third Country training. World Learning/AAI contacted the requested training providers and responded May 15 and May 27 requesting SO3 background information and other clarifications such as the course reservation status of the nominees. As the first participants were due to arrive in the U.S. May 31 for courses beginning June 2, it became critical to determine how to disburse allowances. In March, REDSO/WCA requested that World Learning remove the allowances from the participant budget and indicated that the Mission would disburse them.

On May 22 World Learning/AAI contacted the Mission regarding payment and reconciliation of allowances. The Mission replied requesting that World Learning/AAI make and reconcile payments. On May 30 World Learning/AAI received written authorization from REDSO/WCA to incur allowance costs with an indication that the Delivery Order would be modified accordingly. This authorization became Modification No. 1. World Learning/AAI mobilized as quickly as possible to address the immediate needs of the first three participants arriving (the Mission canceled two others) but made some errors in making per diem payments, namely, not all Mission advances were subtracted from the payments made.

On June 10 World Learning/AAI received SO3, Improved Family Health, background information and charts listing the related Intermediate Results, which they used to reinforce the purpose of the training with participants and training providers.

PROGRAM HIGHLIGHTS:

Advances in Family Health Communication

Alexina Arthur, Advances in Family Health Communication, Johns Hopkins School of Health, Center for Communication Programs, May 31 - June 27, 1997

The following highlight was written by Debra Egan of The African-American Institute.

Summary: Ms. Arthur was to attend this course with another Mission candidate, Dr. Kwame Ampomah, but he was canceled the day before he was to travel, due to ill health. Ms. Arthur is a Senior Lecturer teaching Russian language and literature in the Department of Modern Languages at the University of Ghana, Legon. She serves on Ghana's National Population Council as the chairperson of the Technical Advisory Committee on Information, Education and Communication (IEC). In her application, her written training objectives included: become acquainted with new trends in IEC, upgrade knowledge and skills in development of strategic plans, management of communication projects and evaluating communication

programs. She also intended to help design and implement similar workshops in Ghana to create a critical mass of IEC specialists at the national, regional, district and community levels there.

The course included instruction on preparing communication strategies with SCOPE, an interactive computer tool, which Ms. Arthur commented was an entirely new concept for her. Other course sessions focused on: using mass media for messages that lead to behavior change, educating with entertainment to reach a broader audience, attracting corporate and media support to leverage communication program costs, evaluating communication programs to improve future performance and building institutional capabilities to develop self-sustaining programs. The program included a day field trip to Washington, DC.

The program was conducted in Towson, Maryland on the campus of Towson State University at a conference center which features lodging and rooms for instruction. It is located about 20 miles from Johns Hopkins University, which is in downtown Baltimore. The Mission ticketed the participant directly to Baltimore, due to the short lead time between nomination and the course start. Fortunately, the World Learning/AAI Monitoring and Support Specialist lived in Baltimore at the time and arranged to conduct a briefing with the participant at the course site. Also fortunately, the Mission provided $1,000 advance maintenance allowance (AMA), so World Learning/AAI was able to pay lodging directly. Thus, the participant was due only a relatively small check for balance of the meals and incidentals allowance and ground transportation, and she had sufficient AMA funds on arrival.

Lessons Learned: The in-person briefing between World Learning/AAI and Ms. Arthur proved valuable in addressing logistics and expectations, and her training experience appeared to go smoothly.

The following evaluation was written by Cammy Moore of Creative Associates International, Inc.

The program has been evaluated according to participant responses from two different evaluation instruments: the Orientation Instrument (OI) and the Training Conclusion Instrument (TCI). Certain questionnaire responses are measured numerically according to a seven-point scale. The number seven is always the highest measure, indicating – for example – extreme satisfaction, and the number one is the lowest measure indicating the opposite, or complete dissatisfaction. This numerical rating is referred to with a value (V) (e.g. V=6).

Summary: This participant attended two orientation programs in preparation for her training program: one in-country prior to her departure and one at her training facility. She reported that USAID representative(s), World Learning/AAI team representative(s), and representative(s) of her training provider took part in the orientations. She reported that the orientations were very useful (V=6) and that she was sufficiently prepared for her training.

Ms. Arthur was nominated for this training by her supervisor or employer. She and her employer worked together in planning the training she would receive. Together they determined the specific new skills she would need to perform her job better, as well as the results her training should have for her organization. Ms. Arthur rated the following as the most important reasons for her taking part in this program: increasing her general knowledge in her field (V=7); achieving results or making a contribution to her employing institution (V=7); and contributing to development in Ghana (V=7). Making professional contacts was also a reason for her taking part in the program (V=5). Ms. Arthur reported that she feels she participated sufficiently in planning her training program and the results expected of her within her employing institution.

Ms. Arthur reported that she understands extremely well how her training will help her to contribute to the services her employing institution provides and to Ghana's development (V=7). Ms. Arthur is a consultant working for the government; she reported that at the end of her training program she would be returning to the same position. On her OI, she stated that she plans to keep in touch with her supervisor, colleagues, and friends at work during her training in the U.S.

This participant indicated that she intends to make changes or achieve other results within her employing institution when she returns from the training. She intends to make the work of the Technical Advisory Committee of the Information, Education and Communication Section (IEC) more efficient.

She said that her training will play a definite role in her ability to achieve changes within her employing organization. Ms. Arthur stated that her skills, support from her organization, support from colleagues, sufficient resources, support from her government, and demand for her institution's services are the factors that will make the greatest contribution to enhancing the impact she has on her employing institution. Ms. Arthur indicated that external constraints not under her or her organization's control may impede her efforts to achieve change within her organization.

Ms. Arthur reported that, upon her return to Ghana, she will continue to facilitate the work of the IEC Section of the National Population Council (NPC) through the design of workshops and advising the directorate on issues relating to IEC. Together with the USAID IEC advisors in Accra, she plans to design and implement similar workshops. She also plans to review the existing IEC monitoring and evaluation mechanisms of implementing agencies. In general, she intends to be able to perform her tasks better. She also stated that on her return, she intends to share with the NPC Directorate the new trends in IEC health communication that can be adopted by implementing agencies for greater impact. She plans to share new knowledge with colleagues. She looks forward to applying new and enhanced skills to her work.

Lessons Learned: Ms. Arthur seemed generally very satisfied with her orientation programs. She made no comments on her OI that could suggest that anything needs to be changed or improved.

Executive Course in Health Financing and Sustainability

Charity Okosua Asare, Executive Course in Health Financing and Sustainability, Management Sciences for Health, June 9 - 27, 1997

The following highlight was written by Randall Blandin of The African-American Institute.

Summary: Ms. Asare is a regional coordinator for a family planning, community-based distribution (CBD) program at the Young Women's Christian Association (YWCA) in Accra. In her course application, she indicated she liaises between YWCA and other sectoral ministries and collaborator agencies on Adolescent Reproductive Health (ARH) and other health related issues. She was hopeful that the course would equip her for effective planning and supervision of integrated rural health projects and programs. She also hoped that the course would add to her knowledge of health financing in order to sustain the CDB and ARH programs and activities in the Greater Accra Region.

The three week Management Sciences for Health (MSH) course covered: lessons learned from health sector reform, economic principles and the health sector, the impact of health systems on health, trends in health care financing, comparative health financing in various countries, options for financial sustainability, private sector strategies, managed care and HMOs, financial planning and budgeting, national and private health insurance, government regulation of health insurance, quality of care and costs, cost effectiveness analysis, cost containment, contracting out for health services and strategic thinking and action plans. As part of the course, all participants complete actions plans to take home. In this case, Ms. Asare did not forward a copy of the action plan to World Learning/AAI. The course also included a field trip to a local community health center.

Lessons Learned: The Mission was unable to ticket Ms. Asare through Washington, DC for an administrative briefing due to flight difficulties, so she traveled directly to Boston. World Learning/AAI mailed the allowance checks and briefing materials to Ms. Asare. She returned some completed forms but not the training conclusion evaluation form. An in-person briefing and debriefing would have made more comprehensive monitoring possible; it could have facilitated the collection of evaluation and action plan documents as well as reconciliation of the $100 Mission advance. Ms. Asare and the World Learning/AAI

team maintained congenial correspondence during her brief stay despite the intense course schedule. Her feedback indicated satisfaction with programming services, including reimbursements.

The following evaluation was written by Cammy Moore of Creative Associates International, Inc.

The program has been evaluated according to participant responses from two different evaluation instruments: the Orientation Instrument (OI) and the Training Conclusion Instrument (TCI). Certain questionnaire responses are measured numerically according to a seven-point scale. The number seven is always the highest measure, indicating – for example – extreme satisfaction, and the number one is the lowest measure indicating the opposite, or complete dissatisfaction. This numerical rating is referred to with a value (V) (e.g. V=6).

Summary: This participant attended three orientation programs in preparation for her training program: one in-country prior to her departure, one upon her arrival in the U.S., and one at her training facility. She reported that representative(s) of her employing institution took part in the orientations. She reported that the orientations were extremely useful (V=7) and she felt adequately informed. In summarizing her orientations, she reported that she was sufficiently prepared for her training.

Ms. Asare reported that she was nominated for this training by her supervisor or employer, that she was nominated or recommended by USAID, and that her employer recommended training for her in order to obtain new skills because she will be taking on new responsibilities. She and her employer worked together in planning the training she would receive. Together they determined the specific new skills she would need to perform her job better, as well as the content of her training program and the results her training should have for her organization. Ms. Asare rated the following as the most important reasons for her taking part in this program: increasing her general knowledge in her field (V=7); achieving results or making a contribution to her employing institution (V=7); and contributing to development in Ghana (V=7). Making professional contacts was also a reason for her taking part in the program (V=6). Ms. Asare indicated that she feels she participated sufficiently in planning her training program, and in planning the results expected of her within her employing institution.

Ms. Asare reported that she understands extremely well how her training will help her to contribute to the services her employing institution provides and to Ghana's development (V=7). Ms. Asare is a senior manager working for an NGO; she reported that at the end of her training program she would be returning to the same position.

This participant stated that she intends to make changes or achieve other results within her employing institution when she returns from the training. She intends to expand and improve the services her employer provides. Ms. Asare said that her employer defined the objectives of her training program. Before her training program began, she and her employer also defined the results she plans to achieve upon her return; they agreed on how she would apply her training.

She said that the training will play a definite role in her ability to achieve changes within her employing organization. Ms. Asare stated that her skills, along with having sufficient resources, are the factors that will make the greatest contribution to enhancing the impact she has on her employing institution. Ms. Asare stated that resource constraints may have the greatest effect on her efforts to achieve change within her organization.

Ms. Asare said that upon her return to her employer, she will share newly acquired skills with management and colleagues. She intends to collaborate with other institutions with similar interests, aspirations, and goals. She also has plans to generate or mobilize adequate resources to improve and expand community health-integrated programs. She will network with collaborating institutions to advocate for change in health sector reforms when necessary.

Lessons Learned: Ms. Asare seemed generally very satisfied with her orientation programs. She made no comments on her OI that could suggest that anything needs to be changed or improved.

Management and Marketing for Social Change

Marian Amissah, Management and Marketing for Social Change, Georgetown University/Futures Group International, June 2 - 20, 1997
Joshua Kweku Ofori, Management and Marketing for Social Change, Georgetown University/Futures Group International, June 2 - 20, 1997

The following highlight was written by Randall Blandin of the African-American Institute.

Summary: Ms. Marian Amissah is a Deputy Head, Senior Health Educator and Mr. Ofori is a Health Education Officer in the Health Education Unit at the Ministry of Health. It is our understanding that a third nominee, Ms. Nana Akua Agyeman-Bedu, who was nominated and then canceled by the Mission, attended with funding from her employer instead of with Mission funding. According to their course applications, Ms. Amissah hoped to enhance her presentation skills to market the Unit's programs; Mr. Ofori sought to increase his understanding of social marketing concepts in order to incorporate them into planning campaigns and activities.

Ms. Amissah and Mr. Ofori arrived with a $1000 advance each from the Mission, which was more than they were due for the meals and incidentals allowance (M&IE) of $42/day for a three week program, so it went toward both M&IE and part of the lodging cost. A number of communication issues arose regarding lodging. World Learning/AAI requested that the training provider reserve shared double lodging if possible per the budgeted USAID cost containment policies. It was also requested that the Mission advise if it authorized single lodging instead as per the Training Implementation Plan (TIP) sent May 26. However, World Learning/AAI did not receive a reply prior to the participants' U.S. arrival. It turned out that there was not another woman in the course to pair with Ms. Amissah, given the number of women in the program who opted for or who had funding for single lodging, including the other Ghanaian woman who was not funded by the Mission. The situation was different for Mr. Ofori - there was a participant who needed to share lodging costs. Unfortunately, the hotel did not have a double room available for these two men the first night, May 31. A double room became available beginning the next night. According to the hotel and the training provider, Mr. Ofori declined to share a room until June 6, after another exchange of correspondence between World Learning/AAI and the Mission confirmed that the Mission expected him to share lodging, if available.

Due to the tight course schedule, participants did not come to the World Learning/AAI office for a briefing. A representative from World Learning/AAI went to the course site in Washington, DC June 5 and provided the briefing during the course lunch break. It was then that the housing situation became apparent; the World Learning/AAI Monitoring and Support Specialist acted upon it immediately by following up with the Mission, the hotel and the training provider. Given the high amount of the Mission advance, the participants were not due to receive a check at this briefing, but instead at the end of the program. World Learning/AAI prepared checks minus the Mission advance amount and mailed them to the hotel June 16; they normally would have been received the next day. Ms. Amissah received her check, but Mr. Ofori's was lost in the mail. Ms. Amissah's check was based on her single lodging costs throughout the course, and she settled her hotel bill. As Mr. Ofori did not receive his funds, the Monitoring and Support Specialist calculated for him the portion of his Mission advance he would need to pay toward the hotel bill, $51 (the rest of the advance covered M&IE of $924 and ground transportation of $25 to the airport on the exit day). World Learning/AAI arranged to be billed directly by the training provider for the balance of lodging costs. The agreement was to bill for the shared double rate for the first night when the shared room that World Learning/AAI requested was not made available, single rate for June 1-5, and shared double rate for the rest of the nights.

Mr. Ofori complained to World Learning/AAI, the hotel and the training provider, even contacting the training provider in the middle of the night before departing, about the arrangements. In the eyes of World Learning/AAI, the hotel and the training provider, agreements had been made to the advantage of the participant and to accommodate him as fully as possible. Following Mr. Ofori's departure, World Learning/AAI still had to sort out the details of the hotel billing, so the dates and rates would match the

agreement and so occupancy tax, of which we were not informed in advance, would be removed from the bill before it was paid.

Lessons Learned: The evidence continues to show the value of ticketing participants to Washington, DC for a briefing before the training course begins. In this case, it would have been helpful if the participants could have arrived in time for a briefing the Friday before the course started. It is acknowledged they were the first participants to arrive under the Delivery Order, and the Mission and World Learning/AAI had to make last minute arrangements with little turnaround time. Following this program, the Mission began to indicate before participants arrived whether it authorized single lodging, which was helpful. It is understood that when shared double lodging is requested in advance, but a roommate is not available, single lodging rates will be paid. However, in the future, when shared double lodging is requested and a roommate is available, but the participant selects single lodging, the participant will be paid at the shared double rate and will be required to pay the difference.

The following evaluations were written by Cammy Moore of Creative Associates International, Inc.

The programs have been evaluated according to participant responses from two different evaluation instruments: the Orientation Instrument (OI) and the Training Conclusion Instrument (TCI). Throughout this report, certain questionnaire responses are measured numerically according to a seven-point scale. The number seven is always the highest measure, indicating – for example – extreme satisfaction, and the number one is the lowest measure indicating the opposite, or complete dissatisfaction. This numerical rating is referred to with a value (V) (e.g. V=6).

Summary: Ms. Marian Amissah indicated on her TCI that the highest degree she earned before this trip was a Masters. Joshua Ofori reported that his highest degree was a Bachelors. Both participants reported having other training outside Ghana, and both reported visiting the U.S. previously.

These participants attended three orientation programs in preparation for their training program: one in-country prior to departure, one upon arrival in the U.S., and one at the training facility. They reported that representative(s) of the World Learning/AAI team, representative(s) of the training provider, and USAID representative(s) took part in the orientations. Ms. Amissah reported that the orientations were useful (V=5); Mr. Ofori felt they were only moderately useful (V=3). Specifically, Ms. Amissah rated her in-country orientation useful (V=5), while Mr. Ofori rated it not very useful (V=2). Ms. Amissah was a little less positive about her World Learning/AAI orientation but still rated it useful (V=4), while Mr. Ofori gave it a low rating (V=2) with the explanation that it was too late to be very helpful. Both participants felt the orientation they received at their training facility was very useful (V=6 and 7). The participants were generally satisfied with the types of information they received at their orientations. They indicated, however, that they would have preferred more information about their training location, the personnel to contact at their training facility, the amount of time allotted to each part of the program, and USAID regulations, procedures, allowances, and requirements. In summarizing their orientations, they both said that they were sufficiently prepared for the training.

Both participants reported being nominated by their supervisors or employers. Ms. Amissah also stated that her employer selected her for this training because institutional performance deficits were noted during a training needs assessment. Both participants reported that they and their employers worked together in planning the training they would receive. Together they determined the specific new skills the participants would need to perform their jobs better. Mr. Ofori reported that he and his supervisor also collaborated in determining the results his training should have for his organization.

The participants rated the following as the most important reasons for their taking part in this program: increasing their general knowledge in their fields (V=7); achieving results or making a contribution to their employing institutions (V=7); and contributing to development in Ghana (V=7). Mr. Ofori also felt that obtaining a certificate of participation was an important reason (V=7). They rated the opportunity to make professional contacts important as well (V=5 and 4).

On their OIs, Mr. Ofori reported that he felt he participated sufficiently in planning his training program, but Ms. Amissah felt the contrary. Both participants contradicted themselves later, however, when on their TCIs they each indicated the opposite view. On the TCIs, both participants said they felt they participated sufficiently in planning the results expected of them within their employing institutions. Mr. Ofori indicated that the results expected of him within his employing institution were explained to him. Both reported that they understood what their employers expected of them prior to beginning their U.S. training. Both participants reported that it was explained to them how their training program relates to USAID's development goals.

The participants reported that they understand extremely well how their training will help them to contribute to the services their employing institutions provide and to Ghana's development (V=7). Both said that their training will be useful in carrying out the services their employing institutions provide. The participants are both senior managers working in the government; they both reported that at the end of the training they would be returning to the same position. Mr. Ofori said that his employer defined part of the content of his training program. Ms. Amissah reported that her employer nominated her for the training, but did not play any further role in planning her training. Neither participant planned to communicate with their employer during the training.

Both participants stated that they intend to make changes or achieve other results within their employing institutions when they return from the training. Both intend to improve the services their employers provide. Mr. Ofori also intends to expand his employing institution's budget. Before her training program began, Ms. Amissah devised her own plan to apply her training within her employing institution. Mr. Ofori worked with his employer to agree on how to apply his training. Both participants have a Training Agreement which specifies the reason for and purpose of their training. Both said that their employer was involved in forming this Training Agreement.

The participants indicated on their TCIs that the level of their training program was just right. They both also felt, however, that the duration of the training was too short. They both indicated separately that there was not enough time allowed to achieve the objectives of the training. They reported that the elements that were included in their program were the following: lectures, small group discussions or projects, working with colleagues, management training, and leadership training. Both participants indicated that the training fit their professional goals and their employing institution's goals, that there was enough variety in the program's activities, that the people at the training facilities were adequately prepared, and that the training was at their own levels of skill. Mr. Ofori felt that too much time was devoted to classroom training and too little time was allowed for training outside the classroom. Ms. Amissah felt that the training was divided appropriately between classroom and outside-the-classroom activities.

Regarding their ability to achieve changes within their employing organization, Mr. Ofori said that the training would play a definite role and Ms. Amissah said that it would play some role. On their TCIs, however, both participants said that the training they received will be very useful in helping them to bring about change in their employing institutions. The participants listed the following as the factors that will make the greatest contribution to enhancing the impact they will have on their employing institutions: their skills, support from their organizations, support from colleagues, sufficient resources, support from their government, and demand for their institutions' services. The participants listed the following as the greatest potential impediments to achieving change within their organization: skills deficits among their colleagues, attitudes toward work and cooperation among their colleagues, lack of support from top management, resource constraints, and lack of cooperation from other organizations or structures.

Both participants said they knew how to contact the World Learning/AAI team Monitoring and Support Specialist responsible for their training while they were at their training facility. Ms. Amissah gave a satisfactory rating to her communication with this Specialist (V=4), but Mr. Ofori was not satisfied with this communication (V=2). Ms. Amissah also gave satisfactory ratings (V=4) to the following support services provided by the Specialist: receipt of allowances in the U.S., and assistance with personal matters. Mr. Ofori gave a low rating (V=2) to his receipt of allowances in the U.S. Ms. Amissah was extremely satisfied with her housing during her stay, and Mr. Ofori was moderately satisfied (V=7 and 4

respectively). Ms. Amissah felt that the financial allowances were somewhat adequate, while Mr. Ofori said they were not adequate.

Regarding extracurricular activities, the participants reported going sightseeing, and they both found these activities thoroughly enjoyable (V=7). Neither participant visited American families in their homes during the program.

For the most part, both participants reported having no difficulties adjusting to life in the U.S. Ms. Amissah did indicate, however, that she had a little difficulty adjusting to the climate and that she felt lonely. Both participants said they felt extremely welcome and accepted in the U.S. (V=7).

Upon return to her employer, Ms. Amissah intends to share knowledge with colleagues at work, and she hopes this will enable a change in attitude toward work. She also plans to apply the marketing mindset concept she learned about in planning programs and in the development of communication strategies for health campaigns. She said she will use public relations strategies to influence decision makers in acquiring financing and other support for her unit. In developing materials, she will use the new marketing concepts she learned about for her organization's marketing activities, and specifically she would like to make the marketing materials more consumer-focused. Mr. Ofori plans on applying more social marketing techniques for health education programs and applying advocacy skills in his work with policy makers.

Lessons Learned: The participants indicated that they would have preferred more information in their orientations. The participants said that the World Learning/AAI representative did not have enough time to orient them properly and that the World Learning/AAI orientation was a couple of days too late. Mr. Ofori said the information provided at the orientations (both by USAID/Ghana and World Learning/AAI) was not detailed enough and not clear. He emphasized that the World Learning/AAI orientation should be better planned and executed, and that it should be timely.

Ms. Amissah stated that while the course was very useful and she will apply what she has learned, the duration of the course should be extended to four weeks (instead of three). For example, she said that during the first week, people are tired from their trip and they are also trying to adjust to the environment, so the first week's sessions should not be so detailed. She added that the whole course is based on the first week's sessions, so this is an important consideration.

Overall, both participants reported being highly satisfied with this training program (V=6 and 7). Both indicated that they believe their overall experience as a USAID participant better prepares them to further the goals of their employing institutions. Both said they would recommend their training program to other people in Ghana with similar technical backgrounds and goals. Ms. Amissah said that the course was "well organized, with the best lecturers and coordinators".

III. CONCERNS/CONSTRAINTS

A. ADMINISTRATIVE ISSUES

There are no administrative issues to report at this time.

B. PARTICIPANT ISSUES

There is a pending issue regarding the disbursement of Ms. Charity Akosua Asare's book shipment allowance. Ms. Asare was "advanced" $100 by the USAID Mission, per a fax dated June 10, 1997 from Joseph Enuson, USAID/Accra to Debra Egan, AAI. There had been some initial confusion about who would disburse participant allowances, as the REDSO/WCA Contracting Officer had requested that World Learning remove the participant allowance amounts from the proposal budget, indicating the Mission would disburse them. Then, just before the initial participants were to arrive in the U.S., the Delivery Order was amended for World Learning to pay participant allowances. In Ms. Asare's case, World Learning did not deduct the $100 advance maintenance allowance (AMA) disbursed by the Mission when calculating the amount for the per diem check. Thus the participant was

inadvertently overpaid by $100. This overpayment was not discovered until after Ms. Asare had already left the country.

IV. RECOMMENDED ACTIONS

The World Learning team has the following recommendations:

That the Mission advise how it prefers to handle the issue of overpayment to Ms. Asare for book shipment allowance.

GTD/GHANA D.O. QUARTERLY REPORT 04/01/97 - 06/30/97
SO3: IMPROVED FAMILY HEALTH

U.S. TRAINING
World Learning Nominations Status Report as of 06/30/97

Listed in Order by Program Start Date

Participant Name	Status*	Course/ Training Institution	Dates	Months**	Estimated Budget
1. Marian Amissah	N, C	Management and Marketing for Social Change/ Futures Group	05/31/97-06/21/97	.73	$ 7,449.00
2. J.K. Ofori	N, C	Management and Marketing for Social Change/ Futures Group	05/31/97-06/21/97	.73	$ 6,649.00
3. Nana A. Agyeman-Bedu	N, X	Management and Marketing for Social Change/ Futures Group	N/A	0	$ 0.00
4. Alexina Arthur	N, C	Advances in Public Health Communications/ Johns Hopkins University	05/31/97-06/28/97	.97	$ 7,194.00
5. Kwame Amponsah	N, X	Advances in Public Health Communications/ Johns Hopkins University	N/A	0	$ 0.00
6. Charity Akosua Asare	N, C	Health Financing and Sustainability/ Management Sciences for Health	06/07/97-06/28/97	.73	$ 6,393.46
TOTALS for 4 programs completed				3.16	$27,685.46
Averages for 4 programs completed			Avg.	.80	$ 6,921.37

* Codes for Status this quarter: N - Nominated, P - Pending, A - Arrived, in Training, C - Completed, X - Canceled, T - Terminated
** "Month" is 30 calendar days

Listed in Order by Program Start Date

Participant Name	Status*	Course/ Training Institution	Dates	Months**	Estimated Budget
7. Thomas J. Amartey	N, A	Managing Health Programs in Developing Countries/ Harvard University	06/12/97-08/09/97	.93	$11,690.41
8. Dianna Osei Addei	N, X	Managing Health Programs in Developing Countries/ Harvard University	N/A	0	$ 0.00
9. Ebenezer Asamoah	N, P	Planning and Managing Information Systems and Communication/Management Sciences for Health	07/02/97-07/25/97	.80	Pending
10. Stephen Kwankye	N, P	Strategic Communication & Advocacy for Reproductive Health/Johns Hopkins University	09/11/97-10/04/97	.80	Pending
11. Frank Nyanator	N, P	Financing Health Care in Developing Countries/ Boston University	09/15/97-12/19/97	3.2	Pending
12. James Addo	N, P	International Course in Applied Epidemiology/ Emory University	10/02/97-11/01/97	1.06	Pending
13. Andrew Kordor Seidu	N, P	International Course in Applied Epidemiology/ Emory University	10/02/97-11/02/97	1.06	Pending
14. Nicholas Kanlisi	N, P	Program & Project Management/ University of Connecticut, CICHS	10/05/97-11/21/97	1.60	Pending
15. Safo Katanga	N, P	Lab Methods/ Centers for Disease Control	dates to be set	-	Pending
16. Philomena Caulley	N, P	Lab Methods/ Centers for Disease Control	dates to be set	-	Pending

* Codes for Status this quarter: P - Pending, A - Arrived, in Training, C - Completed, X - Canceled, T - Terminated
** "Month" is 30 calendar days

SUMMARY: Status of SO3 nominations for U.S. Training as of 06/30/97

	04/01/97- 06/30/97
Pending from past quarters	0
N - Nominated this quarter	16
A - Active, in training this quarter	1
C - Completed this quarter	4
X - Canceled this quarter	3
T - Terminated this quarter	0
P - Pending at end of quarter	8

GTD/GHANA D.O. QUARTERLY REPORT 04/01/97 - 06/30/97
SO3: IMPROVED FAMILY HEALTH

THIRD COUNTRY TRAINING
World Learning Nominations Status Report as of 06/30/97

Listed in Order by Program Start Date

Participant Name	Status*	Course/ Training Institution	Dates	Months**	Estimated Budget
1. Comfort Koranteng-Asante	N, P	Training of Trainers in Reproductive Health/Center for African Family Studies, Kenya	10/06/97-11/02/97	.93	Pending
2. Justina Cofie	N, P	Management of Community Based Family Planning Programs/Center for African Family Studies, Kenya	10/06/97-11/02/97	.93	Pending
3. Agnes Dzokoto	N, P	ICASCA Conference on HIV and STDs, Cote d'Ivoire	12/07/97-12/11/97	.16	Pending
4. Asamoah Adu	N, P	Lab Study Tour Center for Disease Control, Cote d'Ivoire	dates to be set	-	Pending

* Codes for Status this quarter: P - Pending, A - Arrived, in Training, C - Completed, X - Canceled, T - Terminated
** "Month" is 30 calendar days

continued

SUMMARY: Status of SO3 nominations for Third Country Training as of 06/30/97

	04/01/97 - 06/30/97
Pending from past quarters	0
N - Nominated this quarter	4
A - Active, in training this quarter	0
C - Completed this quarter	0
X - Canceled this quarter	0
T - Terminated this quarter	0
P - Pending at end of quarter	4

GLOBAL TRAINING FOR DEVELOPMENT
USAID/GHANA
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 800
Effective Dates: 04/03/97 - 09/30/98
Contract Total: 582,605
Obligated Amount: 582,605

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors, The African-American Institute (AAI) and Creative Associates International Inc. (CAII), from July 1, 1997 through September 30, 1997 under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 800, with the U.S. Agency for International Development.

The report is organized as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions**. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

This Delivery Order, from April 3, 1997 through September 30, 1998, supports two of the Mission's four Strategic Objectives (SOs), health and primary education. For each of these two SOs, the Mission originally requested GTD contractor assistance to conduct a training needs assessment and design a country training plan. The Delivery Order also called for placement, monitoring, management, follow-on programming and reporting of 35 short term participants for U.S. training and 16 for third country training, to complement the in-country planning services. The Mission proposed training in the following subject areas:

SO2: Increased Effectiveness of the Primary Education System (10 U.S. and 6 Third Country participants)
Mission-Proposed Training Subjects:
- Educational Policy
- Decentralization
- Low cost learning materials
- Distance learning
- Supervision

SO3: Improved Family Health (25 U.S. and 10 Third Country participants)
Mission-Proposed Training Subjects:

Program and Project Management
Laboratory Methods and Techniques
HIV/AIDs test counseling
Surveillance and Applied Epidemiology for HIV/AIDS
Laboratory Diagnosis of HIV/AIDS
Health Care Financing
Research, Evaluation and Monitoring
Family Planning, Family Health Communication
Gender Analysis Management/Role of Women
FP Management for Senior Level Managers
FP Logistics Training
Adolescent Training Programs
Social Marketing for Change
Planning and Management
Training Methods

On May 30, 1997, REDSO/WCA issued Amendment No. 1 to authorize World Learning to pay participant allowances for the U.S. trainees and to add funds accordingly. Also in this modification, contract responsibility of this Delivery Order was transferred from REDSO/WCA to the USAID/Ghana Contracting Officer.

In late August 1997 the Mission issued a no-cost extension for one year, extending the completion date from September 30, 1997 to September 30, 1998. The extension was fully executed at the end of September, prior to the close of the fiscal year. The Training Officer was named as the technical point of contact for the World Learning team. The Scope of Work in SO2 was modified to allow a two phase implementation of in-country services for annual training plan development:

"*Phase I*

- Lead USAID/MOE focus group in initial discussion on training expectations, processes and plans. Describe current USAID training process and regulations.
- Share tools and techniques for conducting a training needs assessment and provide guidance on selection criteria. Reach agreement with MOE on their institutional role for follow-on to training.
- Introduce MOE to framework for developing an annual training plan.
- Update Mission Training Officer skills.

Phase II

Assist MOE in:

- Finalizing annual training plan.
- Finalizing selection criteria and process.
- Reaching agreement on first round of trainees.
- Develop follow-on plan with MOE for on the job support to returned trainees."

Note: Based on Amendment No. 2, it is the World Learning team's current understanding that in-country planning services for training needs assessment and training plan development are no longer requested under this Delivery Order related to SO3, Improved Family Health. Also, SO2 requested 2 more U.S. placements, for a total of 12 rather than 10.

II. ACTIVITIES

In July 1997 Susan Votaw West, Evaluation Specialist for Creative Associates International, Inc. and Debra Egan, Delivery Order Manager for The African-American Institute, met with Peter Kresge, Mission Education and Human Resources Development Officer (EHRDO). In the World Learning team's proposal, Ms. West was proposed as Team Leader, Program Development Specialist and Ms. Egan as Program Development Specialist for the in-country training plan services. Mr. Kresge was in Washington, DC for the USAID Conference on Human Capacity Development. He requested that the World Learning team postpone delivering the requested in-country training plan services, which were originally proposed for May, until after the Mission laid groundwork with the new Minister of Education and confirmed the Ministry's readiness to participate in and proceed with a results-oriented training plan needs analysis process.

Following Mr. Kresge's return to the Mission, in August the World Learning team proposed September dates in order to provide the services within the original Delivery Order timeframe. Mr. Kresge provided further clarifications regarding the timing and purpose of the requested in-country services. Given other USAID/Ghana activities scheduled for August and September, he suggested October or November for Phase I of the in-country services. He also indicated that the Mission would only cover costs of a two person team and that he and the Mission Training Officer would set up the appointment schedule. The World Learning team understood from this communication that the Ghana Program Consultant with local health expertise, budgeted to serve as a team member for SO3 Health needs assessment, would not be needed, as the Mission was no longer requesting training plan development services for the Health SO. The team further understood that the Mission requested The African-American Institute Program Representative not serve on the training plan team for SO2 Education as originally budgeted, but would provide support as needed for the team's trip to Ghana.

Mrs. Cecilia Bannerman, The African-American Institute Program Representative in Ghana, participated over the summer, as requested, with the Mission Training Officer in drafting and revising an alumni questionnaire. The purpose of the exercise was to develop a form that would be distributed to collect updated information from returned USAID-funded participants, including those managed by The African-American Institute in past years under the AFGRAD and PIET contracts. Information from the participants' perspective regarding the impact of training as well as updated contact and work information was to be gathered.

From September 8 - 12 1997, Debra Egan was in Accra, Ghana for a meeting of The African-American Institute Program Representatives, who gathered from across the continent. While there, Debra met with a number of Mission staff to gather further information and clarifications on GTD services requested. Mr. Joseph Enuson, the Training Officer, and Mr. Mitch Kirby, the SO2 Manager for Results Package Two, Improved Policies for Quality Education, briefed her. Mr. Kitsh Odun, the SO2 Manager for Results Package One, Quality Education through Model Schools, also updated her on the status of activities. She met briefly with SO3 team members, Ms. Lartey and Mr. Robert Halladay, SO3 Team Leader.

Mr. Halladay confirmed that the Mission's health partner institutions had met on their own in August 1997 to outline training plans and training slots per institution for the next three years of USAID-funded training; thus he did not see a need for training plan services under the GTD contract. He did express interest in a workshop session with heads of the partner institutions to initiate use of a nomination process and set of forms that the World Learning team was developing. The process would capture baseline information from the Mission, the participant and the employer, as required by ADS 253. This information would clearly indicate the institutional performance goals of training in the reengineered USAID environment, including the needs for action planning and training follow-up.

Mr. Enuson and Ms. Egan also met with the Mission Contracting Officer, Mr. Ray Edler. Ms. Egan acknowledged World Learning's receipt of the no-cost extension. However, as the Mission had requested changes, and as there would be additional administrative costs to provide another 12 months of services, Mr. Edler confirmed that the Mission would send a revised Scope of Work and would review a revised budget to be submitted by World Learning.

PROGRAM HIGHLIGHTS:

Planning and Managing Information Systems and Communication

Mr. Ebenezer Asamoah, Planning and Managing Information Systems and Communication, Management Sciences for Health (MSH), Boston University, July 7 - July 25, 1997

The following highlight was written by Randall Blandin of The African-American Institute.

Summary: Mr. Asamoah attended a program designed for officers from Ministries of Health and NGOs, including directors of planning, section heads, management information systems (MIS) directors and officers, and program managers from donor agencies that support MIS projects. The goal of this program was to enable participants to use information to improve decision making; design and manage MIS systems that help their organizations meet strategic goals; identify an MIS model that fits the organization's culture and management; develop indicators for measuring process, performance and impact; oversee the MIS development effort, including management of staff and consultants; and learn how their organization can develop and use e-mail, internet, world wide web, intranets and other new technologies.

Mr. Asamoah successfully completed the program. He commented that he learned how to use strategic analysis and how to develop strategic plans. He also indicated he had learned how to present proposals and utilize e-mail to "help improve the communication process." Mr. Asamoah's primary concern was that this course was too short, given the content and nature of the course. He suggested that in the future, a program of four weeks (one additional week) would be more helpful.

Lessons Learned: Mr. Asamoah raised few concerns about the logistics of the program and indicated he was satisfied with the training program. In part, AAI would attribute Mr. Asamoah's satisfaction with the program to a solid understanding of the terms of his sponsorship -- especially regarding U.S. visa requirements, per diem, and training objectives. AAI also found that the MSH staff were extremely aware of relevant concerns and issues based on their extensive experience in participant training. AAI's impression was that MSH staff were very pro-active in articulating participants' concerns and helping to address any issues raised by the participants. For example, toward the end of the program some participants, including Mr. Asamoah, were concerned about various reimbursements. (n particular, reimbursement for ground transportation from the training site to the airport on their way home). The MSH Training Development Manager wrote a letter articulating participant requests and forwarded this to AAI in a timely fashion, allowing World Learning/AAI sufficient time to process the reimbursement checks, mail them, and for the participants to cash them without difficulty. In this way, the training provider can play a helpful role in ensuring smooth logistics.

The following evaluation was written by Cammy Moore of Creative Associates International, Inc.

The program discussed below has been evaluated according to participant responses from two different evaluation instruments: the Orientation Instrument (OI) and the Training Conclusion Instrument (TCI). Certain questionnaire responses are measured numerically according to a seven-point

scale. The number seven is always the highest measure, indicating extreme satisfaction and the number one is the lowest measure indicating the opposite rating, or complete dissatisfaction. This numerical rating is referred to with a value (V) (e.g. V=6).

Summary: This participant indicated on his TCI that the highest degree he earned before this trip was a Bachelors. He reported that before this, he had not received other training outside Ghana, nor had he previously visited the U.S.

Mr. Asamoah attended three orientation programs in preparation for his training program: one in-country prior to his departure, one upon his arrival in the U.S., and one at his training facility. Mr. Asamoah reported that USAID representative(s) took part in the orientations. He reported on his OI that the orientations were on average very useful (V=6). Separately – on his TCI – Mr. Asamoah rated each of his orientations extremely useful (V=7). He was satisfied with the information that he received at his orientations and reported that he felt adequately informed about the training program when it was about to begin. In summarizing his orientations, he reported that he was sufficiently prepared for his training. He indicated also that he had had enough time to prepare for his departure to the U.S.

In describing the way in which he was selected for this training, Mr. Asamoah reported that he was nominated for this training by his supervisor or employer, that he was nominated or recommended by USAID, that this training was a reward for excellent performance on the job, that his employer recommended training for him in order to obtain new skills because he will be taking on a new job or assignment, and that this training program was an additional segment of a prior training program. Mr. Asamoah indicated that he played no role in planning his training program. He also said that he does not feel that he participated sufficiently in planning both the training program and the results expected of him within his employing institution. Separately he indicated that the results expected of him within his employing institution were not explained to him and that he did not understand what his employer expected of him. He did report, however, that it was explained to him how his training program relates to USAID's development goals.

Mr. Asamoah rated the following as the most important reasons for his taking part in this program: increasing his general knowledge in his field (V=7); achieving results or making a contribution to his employing institution (V=7); and contributing to development in Ghana (V=7). He felt that obtaining a certificate of participation was another very important reason for his taking part in the program (V=6). Making professional contacts was one more reason (V=5). On his TCI, he said he understands extremely well how his training will contribute to the services his employing institution provides and to the USAID development program for Ghana (V=7). He indicated his training will be useful in carrying out the services his employer provides.

Mr. Asamoah is a senior manager working for an NGO; he reported that at the end of his training program he would be returning to the same position. He indicated that there are several changes or other results he plans to achieve within his employing institution when he returns from the training. He intends to expand and improve the services his employer provides. He also plans to improve upon his organization's management information system (MIS). He indicated that the changes he intends to make will take place within a year. Before his training program began, he devised his own plan for how he would apply his training. He said that he did not have a Training Agreement specifying the reason for and the purpose of his training.

Mr. Asamoah indicated on his TCI that the level of his training program was just right. He also felt, however, that the duration of the training was too short. He reported that the elements that were included in his program were the following: lectures, large group discussions or projects, small group discussions or projects, working with colleagues, management training, professional contacts or networking, and other work experience. He indicated that the training fit both his professional goals and his employing institution's goals; that there was enough time allowed to achieve the training objectives; that there was enough variety in the program's activities; that the people at the training facilities were adequately prepared; and that the

training was at his level of skill. Mr. Asamoah felt that the training time was divided appropriately between classroom and outside-the-classroom activities. He said that instruments and equipment were an essential aspect of the training, and that most of the equipment was appropriate for application in Ghana.

When asked if his training will play a role in his ability to achieve changes within his employing organization, he said that the training would play some role. He said that he believes he is somewhat prepared to achieve results within his employing institution upon his return home. Mr. Asamoah stated that his skills, along with support from his organization and colleagues, having sufficient resources, and demand for his institution's services are the factors that will make the greatest contribution to enhancing the impact he has on his employing institution. As for impediments to achieving change within his organization, Mr. Asamoah stated that attitudes toward work and cooperation among colleagues, lack of support from top management, resource constraints, lack of cooperation from other organizations or structures, and external constraints not under his control may have the greatest effect on impeding his efforts.

Mr. Asamoah said he knew how to contact the World Learning team Monitoring and Support Specialist responsible for his training while he was at the training facility. He said he was satisfied with his communication with this Specialist (V=5). Mr. Asamoah also said he was very satisfied (V=6) with the following support services provided by the Specialist: receipt of allowances in the U.S. and assistance with program matters. He was very satisfied with his housing during his stay. He felt, however, that his financial allowances were not adequate.

Regarding extracurricular activities, Mr. Asamoah reported going sightseeing, and he found these activities thoroughly enjoyable (V=7). He said that he also visited American families in their homes during the program, and he enjoyed this aspect of the program very much as well (V=6). This participant said that he made formal or informal presentations about life or activities in Ghana to Americans. He indicated that he became well acquainted with individual Americans, who included his instructors and other training facility staff, fellow students or colleagues, and other Americans. He said that these acquaintances were very important to his total experience in the U.S. (V=6).

For the most part, Mr. Asamoah reported having no difficulties adjusting to life in the U.S. He did indicate, however, that he had a little difficulty adjusting to the food and that he felt somewhat isolated from developments in his employing institution. He said he felt extremely welcome and accepted in the U.S. (V=7).

Mr. Asamoah listed numerous intentions for contributions that he plans to make upon his return to his employer. He reported that he will use the skills he acquired to critically look at his organization's MIS to see how best to make the flow of information between the various levels of the organization more efficient. He also plans to develop new MIS models that best suit his organization to help measure performance and impact. He will look at the content of the MIS and include new indicators to be measured for the organization's reproductive health program, which was originally not part of the MIS.

Lessons Learned: Mr. Asamoah volunteered his opinion that the duration of the training program was too short and that considering the content and nature of the course, the program should last at least four weeks. He was very satisfied with his orientations and felt adequately informed about his program when he began his training. He did indicate, however, that he didn't feel he participated sufficiently in both the planning of the program and the planning of the results expected of him within his employing institution.

In summing up his assessment of the training program, Mr. Asamoah said that taking everything into consideration – his professional, personal, cultural, and social experiences as well as his training – he is very satisfied with his total experience as a USAID participant (V=6). He felt that of the two kinds

of experiences he had during his stay in the U.S. – the training itself and the social, cultural, and personal experiences outside of his training – the training was the more important to him. He indicated that his overall experience as a USAID participant better prepares him to further his employing institution's goals. He said he would recommend his training program to other people in his country with technical backgrounds and goals like his.

Managing Health Programs in Developing Countries

Mr. Thomas Amartey, Managing Health Programs in Developing Countries, Harvard School of Public Health, Harvard University, June 16 - August 8, 1997

The following was written by Randall Blandin of The African-American Institute.

Summary: Mr. Amartey attended the sixth annual "Managing Health Programs in Developing Countries" seminar conducted by the Harvard University School of Public Health. This course is designed for managers and health professionals in both government and non-government organizations, including hospital and preventive health programs at the national, provincial and district government levels. The course is designed specifically for mid-career managers from developing countries and health care managers from industrialized nations who have experience working in the developing world. Course topics ran the gamut from health sector development to social marketing and quality management. Mr. Amartey commented that his training program was extremely useful. He indicated that he would be able to use his newly acquired skills, particularly strategic planning and "computer knowledge", upon return to his job in Ghana.

Lessons Learned: Mr. Amartey was one of the first participants from Ghana to come to the U.S. for training under the GTD/Ghana Delivery Order. During the administrative briefing, AAI queried Mr. Amartey on his plans to complete an "action plan" by the end of this training to share with the Mission and his employer. He was aware that he was required to use the training upon return to his position as Director of Field Operations at the National Population Council Secretariat. However, he did not seem fully briefed or prepared to develop and present a written action plan at the conclusion of his training and was not planning to share a written action plan document with World Learning/AAI staff or with the Mission upon his return to Ghana.

World Learning/AAI has subsequently developed action plan guidelines that are included in the participant orientation packet. In addition, World Learning/AAI has sample action plans on file from other participants' programs which can be shared with the participants and used as models for their own action plans. World Learning/AAI endeavors to share action plan guidelines, along with summary sheets of the Mission's relevant strategic objective(s), with training providers and inform them that they will be expected to work with participants to design action plans. World Learning/AAI hopes that these efforts, coupled with Mission and the employers' efforts to work with the participants on preliminary action plans prior to their arrival in the U.S., will enhance the effectiveness and impact of their training.

Mr. Amartey, while overall very satisfied with the content and quality of the training, raised a concern about allowances and how they were disbursed. He commented that generally he found the per diem amount insufficient, specifically the allowance for book shipment. Per ADS 253 in effect at the time, standard book shipment allowance for short-term technical programs was up to $60, based on receipts. However, like other allowances, the Mission may authorize a higher payment based on justification provided. In this case, AAI requested approval for a higher book shipment allowance based on the estimate Mr. Amartey submitted. USAID/Accra approved a higher rate of $140 ($80 above the $60 already disbursed), but participant departed the U.S. before any further funds could be disbursed.

The following evaluation was written by Cammy Moore of Creative Associates International, Inc.

The program discussed below has been evaluated according to participant responses from two different evaluation instruments: the Orientation Instrument (OI) and the Training Conclusion Instrument (TCI). Certain questionnaire responses are measured numerically according to a seven-point scale. The number seven is always the highest measure, indicating extreme satisfaction and the number one is the lowest measure indicating the opposite, or complete dissatisfaction. This numerical rating is referred to with a value (V) (e.g. V=6).

Summary: This participant indicated on his TCI that the highest degree he earned before this trip was a Masters. He reported that before this, he had received other training outside Ghana, and he had previously visited the U.S.

It is not clear whether Mr. Amartey attended an orientation program in Ghana before leaving for the U.S., because he did not respond to the corresponding question on the TCI. He did indicate, however, that at the time he left Ghana, he had enough information about his training program. He also reported that he felt he participated sufficiently in planning his training program and the results expected of him within his employing institution, and he had enough time to prepare for his departure to the U.S. Mr. Amartey reported that he had an orientation in the U.S. with a representative from World Learning/AAI before his training began, and another orientation at his training facility. He found the World Learning/AAI orientation useful (V=4) and the Harvard orientation very useful (V=6). In summarizing his orientations, he reported that he was sufficiently prepared for his training and he understood what his employer expected of him prior to beginning the program.

Mr. Amartey rated the following as the most important reasons for his taking part in this program: achieving results or making a contribution to his employing institution (V=7); achieving a particular training objective and increasing his general knowledge in his field (V=6); and making professional contacts in the U.S. (V=5). He indicated that the results expected of him by his employer were explained to him. The way in which his training relates to USAID's development goals was also explained to him. He said he understands very well how his training will contribute to the services his employing institution provides and to the USAID development program for Ghana (V=7 and 6 respectively). He said that his training will be useful in carrying out the services his employer provides.

Mr. Amartey is a senior manager working for a parastatal; he reported that at the end of his training program he would be returning to the same position. This participant indicated that there are several changes or other results he plans to achieve within his employing institution when he returns from the training. He intends to improve the services his employer provides. He intends to improve the organizational climate to enable teamwork and a positive working environment. He indicated that the changes he intends to make will take place within a year.

Mr. Amartey reported that no one from his employing organization participated in the planning of his training program. He did, however, communicate with his employer during the program about the content of the training. Before his training program began, he and his employer agreed on how he would apply his training. He said that he did not have a Training Agreement specifying the reason for and the purpose of his training.

Mr. Amartey indicated on his TCI that the level and duration of his training program were just right. He reported that the elements included in his program were the following: lectures, seminars, workshops, small group discussions or projects, working with colleagues, management training, and professional contacts or networking. He indicated that the training fit both

his professional goals and his employing institution's goals; that there was enough time allowed to achieve the training objectives; that there was enough variety in the program's activities; that the people at the training facilities were adequately prepared; and that the training was at his level of skill. Mr. Amartey felt that the amount of training time devoted to in-the-classroom activities was about right.

He said that the training would play some role in his ability to achieve changes within his employing organization. Separately, he indicated that his training will be helpful to him in his efforts to bring about change in his employing organization (V=5). He felt that the training was very relevant to his employer's goals (V=6) and that it was also relevant to his personal career plans (V=5). He said that he believes he is sufficiently prepared to achieve results within his employer upon his return. Mr. Amartey stated that his skills, along with support from his organization and colleagues, having sufficient resources, and support from his government are the factors that will make the greatest contribution to enhancing the impact he has on his employing institution. As for impediments to achieving change, Mr. Amartey stated that attitudes toward work and cooperation among colleagues, resource constraints, lack of cooperation from other organizations or structures, and external constraints not under his control may have the greatest effect on impeding his efforts.

Mr. Amartey said he knew how to contact the World Learning/AAI team Monitoring and Support Specialist responsible for his training while he was at the training facility. He said he was only moderately satisfied with his communication with this Specialist (V=3). Mr. Amartey said he was satisfied (V=4) with the travel arrangements that were made for him. He reported being unsatisfied with the following support services provided: receipt of allowances in the U.S. (V=2), assistance with program matters (V=2), and response to emergencies (V=1). He felt that his financial allowances were inadequate. He was satisfied with his housing during his stay. Mr. Amartey reported that he suffered an illness or accident during his stay that required medical attention. He had no difficulty using his Health and Accident (HAC) insurance.

Regarding extracurricular activities, Mr. Amartey reported attending picnics, parties, or dances; going to movies, concerts, or plays; and going sightseeing. He found these activities very enjoyable (V=6). He said that he also visited American families in their homes during the program, and he enjoyed this aspect of the program very much as well (V=6). He indicated that he became well acquainted with individual Americans, who included his instructors and other training facility staff, fellow students or colleagues, and other Americans. He said that these acquaintances were very important to his total experience in the U.S. (V=6).

Mr. Amartey reported having no difficulties adjusting to life in the U.S. He said he felt very welcome and accepted here. (V=6).

Lessons Learned: Mr. Amartey had some complaints about his Monitoring and Support Specialist. He was not very satisfied with his communication with this Specialist, and explained that the Specialist lacked initiative in dealing with issues related to his program and to his well-being. He went on to say that the Specialist is indecisive and appears to be more committed to protecting the financial concerns of his organization than Mr. Amartey's program objectives. There were other support services that this participant was not very satisfied with, as outlined above. It is not clear what he meant when he indicated that the Monitoring and Support Specialist's response to emergencies was very unsatisfactory. As for the per diem allowance, Mr. Amartey commented that "the allowance is inadequate. The $60 allowance for shipment of course materials is totally unacceptable".

In summing up his assessment of the training program, Mr. Amartey said that overall he was very satisfied with the program (V=6). He volunteered that the most important things he gained from the program were new computer knowledge and strategic planning skills. Taking everything into consideration – his professional, personal, cultural, and social experiences as well as his training – he is satisfied with his total experience as a USAID participant (V=5). He felt that the two kinds of experiences he had during his stay in the U.S. – the training itself and the social, cultural, and personal experiences outside of his training – were equally important. He indicated that his overall experience as a USAID participant better prepares him to further his employing institution's goals. He said he would recommend his training program to other people in his country with technical backgrounds and goals like his.

For additional information on training during this quarter, please refer to Attachment 2, which lists each participant's training program, dates, duration, and estimated cost.

III. CONCERNS/CONSTRAINTS

A. ADMINISTRATIVE ISSUES

This Delivery Order does not incorporate the annual multiplier and cost of living (COLA) increases set forth under the terms and conditions of the prime contract, Part I, section B.3(a)(1), as amended via Modification No. 1. In addition, although the no-cost extension allowed for continued participant programming, it does not adequately cover administrative costs stretched over eighteen months instead of six months. Thus, World Learning will submit a proposed revised administrative budget to USAID, incorporating the annual increase in the multiplier and COLA as well as responding to the two phase training plan development request for SO2 and the remaining participant programming in the Scope of Work.

B. PARTICIPANT ISSUES

There are pending issues regarding the disbursement of Mr. Amartey's extra book shipment allowance. Upon conducting a financial reconciliation of participant's file, AAI noted that Mr. Amartey was "advanced" $100 by the USAID Mission, per a fax dated June 10, 1997 from Joseph Enuson, USAID/Accra to Debra Egan, AAI. There had been some initial confusion about who would disburse participant allowances, as the REDSO/WCA Contracting Officer had requested World Learning remove the participant allowance amounts from the proposal budget, indicating the Mission would disburse them. Then, just before the initial participants were to arrive in the U.S., the Delivery Order was amended for World Learning to pay participant allowances. In this case World Learning did not deduct the $100 advance maintenance allowance (AMA) disbursed by the Mission when calculating the amount for the per diem check and thus inadvertently overpaid Mr. Amartey by $100. This overpayment was not discovered until after Mr. Amartey had already left the country.

A second issue regarding Mr. Amartey's book shipment is that his written receipt is still needed. Per the February 1997 version of ADS 253, book shipment is no longer an automatic allowance, but is instead paid based on receipts. The standard amount was "advanced" to the participant, with the clear understanding he would promptly forward his receipt. Based upon the receipt, AAI would make the necessary adjustment for payment over the standard amount following Mission approval. Once the receipt is received, Mr. Amartey will have been overpaid a total of $20, ($100 Mission AMA minus $80 due for excess book shipment).

IV. RECOMMENDED ACTIONS

World Learning has the following recommendations:

- That the Mission advise how it prefers to handle the issue of overpayment of book shipment allowance due to AMA not deducted.

- That the Mission confirm when it and the Ministry of Education will be ready for in-country training planning services, establish dates and agree on respective responsibilities for the activity. The key players in Ghana will need to make themselves available for the pre-Phase I preparation and groundwork, Phase I, post-Phase I assessments and Phase II.

- That future SO3 and SO2 trainee nominations be subject to a nomination process using forms that capture the intended relation of training to achievement of Intermediate Results, baseline performance information, preliminary action planning and employer supervisor support for training. During in-country services, World Learning/AAI will provide sample forms customized for USAID/Ghana. World Learning will also brief users in the Mission and partner institutions on the benefits of collecting comprehensive information in the nomination process and show how it can help maximize the effectiveness of performance results-oriented training.

- That the Mission review and approve the World Learning's revised budget, which incorporates COLA and miltiplier adjustments as well as additional administration costs covering the period through September 30, 1998.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/HONDURAS
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 806
Effective Dates: 06/02/97 - 03/31/98
Contract Total: $132,231
Obligated Amount: $132,231

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors, The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* Infostructure from July 1, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 806, with the U.S. Agency for International Development.

The report is organized as follows: Summary, Activities, Concerns/Constraints, and Recommended Actions. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

Through the GTD contract, four academic participants and their files were transferred from Partners for International Education and Training (PIET) to World Learning Inc. During this quarter, World Learning met with PIET staff to be briefed on the status of the four participants. PIET staff had sent letters to the participants, as well as their academic and international advisors, informing them of the change in contractor. World Learning Monitoring and Support Specialist, Rachel Waldstein, followed up by telephone and letter to establish contact and begin to build a personal rapport.

All participant information and budgets were entered into World Learning's GTD Information System (GTDIS). HAC contractor identification was changed from PIET to World Learning. World Learning made required financial payments to students and universities.

World Learning staff contacted participants on a monthly basis, and sometimes with more frequent contact to resolve particular issues. Academic and International Student Advisors were contacted, at a minimum, bi-monthly or on an as needed basis. Ms. Waldstein began to plan for her upcoming campus visits scheduled to take place in October 1997.

During this quarter, World Learning coordinated programs for three individual short-term participants included in this Delivery Order. These participants were placed by the Mission in pre-selected off-the-shelf short courses, prior to World Learning's receipt of a signed Delivery Order. Upon receipt of the Delivery Order, World Learning contacted the training providers to confirm enrollment and ascertain that the training providers would make necessary logistical arrangements. Ms. Waldstein conducted orientations, monitoring and exit debriefings, and made all required financial payments.

II. ACTIVITIES

Marco Espinoza, BS/Forest Management, Utah State University, June 1995 - December 1997

Mr. Espinoza moved to a new apartment in Logan at the end of June. He took classes during the Summer Quarter. At the Monitoring and Support Specialist's request, Mr. Espinoza submitted a new Plan of Study (POS), because the previous one no longer matched actual course work completed. The POS and the Spring Academic Enrollment and Term Report (AETR) were sent to the Mission.

Marco Fonseca, BS/Forest Management, Utah State University, June 1995 - December 1997

Mr. Fonseca took classes during the Summer Quarter. In July, Mr. Fonseca reported he had never received his reimbursement check for Spring books. Ms. Waldstein informed PIET, which voided the first check and issued a new one. World Learning, with Mission approval, paid Mr. Fonseca's tutoring fees.

Ricardo Lezama, BS/Protected Areas, University of Idaho, June 1995 - December 1997

Mr. Lezama took Summer classes. Early in the Fall semester he expressed concern that he could not handle the heavy load of five classes and might not graduate on time. Ms. Waldstein followed up with his International Student Advisor and Academic Advisor and ascertained that, despite his own misgivings, Mr. Lezama was in fact doing well. Ms. Waldstein informed the Mission of his status and continues to monitor Mr. Lezama's situation closely. Ms. Waldstein sent his Spring AETR to Mission.

Martha Ivonne Oviedo, BS/Wildlife Management and Protected Areas, University of Idaho, June 1995 - December 1997

Ms. Oviedo went home in May for a family emergency. She returned on July 23, 1997, so she did not take summer classes. She missed a required Summer Camp, so the Monitoring and Support Specialist advised Ms. Oviedo to meet with her Academic Advisor to discuss how she would make up this requirement. Ms. Waldstein sent her Spring AETR to the Mission.

Glenda Maribel Gallardo, Project Evaluation for a Sustainable Development in Latin America, University of Connecticut, June 3 - 27, 1997

Ms. Gallardo arrived two days late for the course. She experienced food poisoning, which also caused her to miss a day of class. Nonetheless, she reported that the course was quite useful, and she gained a great deal of information to take home. She was confident she would be able to make a significant contribution as to development in Honduras as a result of the course. An Evaluation Report was submitted to the Mission on September 3, 1997.

Raul Ernesto Matute, Tax Analysis and Revenue Forecasting, Harvard University, June 22 - August 8, 1997

Mr. Matute participated in a seven week intensive course at Harvard University. He experienced no difficulties or health problems. He reported that the classroom sessions and computer exercises provided useful information and practical experience in tax modeling. His only wish was that if he had known more about the course before coming to Harvard, he would have brought more materials from home to help him with his project. An Evaluation Report was submitted to the Mission on September 3, 1997.

Jorge Honorato Navarro, Macroeconomic Policy and Management, Harvard Institute for International Development, June 22 - August 2, 1997

Mr. Navarro participated in a six week intensive course at Harvard University. He experienced no difficulties or health problems. He learned a great deal of information from the course, and committed himself to becoming a more active player in macroeconomic policy and implementing the ideas gained. An Evaluation Report was submitted to the Mission on September 3,1997.

III. CONCERNS/CONSTRAINTS

While HAC coverage through Acordia Healthcare Solutions was transferred from PIET to World Learning Inc., to date no bill has been received. Due to technical difficulties, Acordia has been unable to produce an invoice. Acordia is currently working with USAID to resolve their internal billing issues. Acordia and USAID have given assurance that participants will continue to receive full coverage.

IV. RECOMMENDED ACTIONS

World Learning will continue to request direction from USAID on how to proceed with HAC payment. Once a procedure is in place and World Learning is invoiced, payment will be processed retroactively. The participant files will be reconciled and closed.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/SENEGAL
QUARTERLY REPORT
JUNE 11 - SEPTEMBER 30, 1997

Delivery Order No.: 808
Effective Dates: 06/11/97 - 09/30/98
Contract Total: $657,120
Obligated Amount: $657,120

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors, The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure, from June 11, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 808, with the U.S. Agency for International Development.

The report is organized as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions**. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

On May 15, 1997, Partners in International Education and Training (PIET) received a fax from USAID/Dakar requesting assistance to program a U.S. observation study tour (OST) for 3 officials from the Social and Economic Council from June 23 - July 13, 1997 under a soon-to-be issued GTD Delivery Order with World Learning. The next day World Learning replied to express interest in addressing the request, inquired when a GTD Statement of Work could be expected, and indicated that a signed Delivery Order would need to be in place before the participants arrived.

On May 30, 1997, World Learning received a GTD Statement of Work (SOW) from USAID/Dakar. The SOW requested placement and monitoring services for 52 participants to be programmed under two of the Mission's Strategic Objectives (SOs) and one Special Objective:

SO1 Decreased Family Size
10 U.S. participants in short courses
8 Third Country participants: 4 for conferences, 4 for an observation study tour (OST)

SO2 Increased Crop Productivity Through Improved Natural Resources Management in Zones of Reliable Rainfall
12 U.S. participants: 8 in short courses, 4 in OSTs
5 Third Country participants: 3 in an OST and 2 for conferences

Special Objective
Democracy and Governance
13 U.S. participants: 10 in short courses, 3 in an OST
4 Third Country participants in an OST

These planned training activities were listed in the Delivery Order Annex which briefly charted, by SO, the target employing institutions and numbers for participant nominations, type and length of training, and institutional performance changes expected. In addition to the 52 new participants listed, 35 for U.S. and 17 for Third Country

Training, the Mission also requested monitoring services for two academic participants being transferred from the PIET contract as of June 30, 1997, who were expected to complete training by the end of August 1997.

World Learning and the Mission exchanged questions and clarification correspondence regarding the SOW in early June; in addition, World Learning requested pre-contract authorization for costs associated with the first OST. Pre-contract authorization for $1,649 in administrative costs was received June 11, 1997. Pre-contract authorization for OST participant costs was received the week they arrived in the U.S. The contract was signed August 1, 1997.

II. ACTIVITIES

Between June and September, World Learning/AAI monitored the two academic participants and programmed one OST for USAID/Senegal. This was a transition period from PIET to GTD. In the midst of moving former PIET AAI staff to the World Learning GTD office in late June and early July, they provided an intensive, highly responsive level of service on quick turnaround time for the OST request.

The Mission advised that in addition to the three Mission-funded participants for the OST, Mr. Famara Sagna, President of the Social and Economic Council (CES), the fourth-ranking official in the Government of Senegal, would be funded by the Government of Senegal to come to the U.S. during the first week of the CES study tour. On June 24, the Mission provided participant biodata, background on the CES, objectives for the tour and requested adjusted dates of July 7 - 27, 1997. This left very little time, eight work days, to make the myriad of programming and logistical arrangements. The last work day before the program was to start, July 3, the Mission requested that the program be extended by one week, July 7 - August 1, so Mr. Sagna could attend the last, now fourth week, instead of the first week of the tour. The three participants missed their flight out of Dakar for their own reasons, arrived to the U.S. one day late and began their program July 8. See the Program Highlights for a further description of activities.

PROGRAM HIGHLIGHTS:

Observational Study Tour, U.S. Think Tanks

Mr. Adama Diaw, Mr. Mamadou Gueye, and Mr. Mamadou Mbaye, Observation Study Tour, U.S. "Think Tanks", July 7 - August 1, 1997

Summary: Three participants who represented the Observatoire Economique et Sociale, of the Conseil Economique et Social (CES) attended a four week observational study tour, OST. During the program, the three, accompanied by their escort/interpreter, Mr. Andre Pichot, met with staff from 27 U.S. "think tanks", university research centers, and public policy groups in eight U.S. cities: Washington, DC; New York, NY; Philadelphia, PA; Princeton, NJ; Boston, MA; Atlanta, GA; San Francisco, CA; and, Los Angeles, CA. Mr. Famara Sagna, President of the CES, joined them in the U.S. during the final week.

The objectives of this OST were to enable participants to:

- Examine management, organizational structures, and operations of U.S. think tanks,
- Learn new procedures and organizational methods, especially for data collection,
- Look at processes and methods of publishing information,
- Explore opportunities for scientific professional cooperation, such as exchanges, study tours for CES professionals, including prospects and arrangements for their participation in seminars, colloquia, and retraining courses.

The participants obtained sample copies of think tank publications and information to enable them to compile a list of U.S. experts interested in the possibility of future collaboration. In their exit debriefing, Mr. Diaw, Mr. Gueye and Mr. Mbaye expressed the hope that from this tour, future opportunities will be cultivated that will foster cooperation with U.S. think tanks and lead to collaboration and consultation with

think tanks and public policy organizations, possibly with third-party funding. Through their experiences in this program, they gained exposure and skills to: create a think tank, establish cooperative relations with think tanks they visited and identify opportunities for the CES Observatory professional staff to receive short-term training with those think tanks and to participate in later educational seminars.

Lessons Learned: World Learning/AAI responded swiftly to this training request and designed a one month observational study tour for the three participants, incorporating numerous schedule adjustments requested by USAID/Senegal, including Mr. Famara Sagna's changing participation and inserting a two-day tour of think tanks and research centers in Atlanta, GA with former USAID/Senegal Mission Director Dr. Julius Coles. While reacting quickly and successfully to the many requests, World Learning/AAI notes that that this program and future OSTs would benefit from ample lead time and planning rather than last minute programming. For example, requested schedule changes in this OST necessitated booking new flight reservations to add cities to the tour, which resulted in late ticketing and higher priced tickets. (This is just one example of how more lead time will help program staff design effective quality training programs for USAID/Senegal and help the Mission reduce costs of training.)

M.S. Agricultural Economics

Ms. Oumou Koulsom Ly, The Economics Institute followed by M.S. Agricultural Economics, Ohio State University, Columbus, Ohio, June 10, 1995 - September 30, 1997

Summary: Ms. Ly attended the annual conference of the American Agricultural Economics Association (AAEA) in Toronto, Canada, July 27 - 30, 1997. PIET sent her funds to attend the conference and a return international air ticket to Dakar from PIO/P funds, as she was expected to complete the degree and depart by August 30, 1997. When GTD program staff contacted her in late August to confirm her departure and settle final financial reimbursements, she informed World Learning/AAI that she was not able to complete her thesis work by the projected date. World Learning/AAI in turn informed the Mission the first week of September. In mid-September the Mission requested a detailed justification from the academic advisor as well as an itemized cost estimate, which World Learning/AAI is gathering, so a decision can be made in early October. Ms. Ly's IAP-66A expired on August 31, 1997 and she received no September monthly maintenance allowance while a decision on the extension request is pending.

M.S. Renewable Natural Resources Studies

Mr. Mamadou Niane, M.S. Renewable Natural Resources Studies, University of Arizona, Tucson, AZ, June 10, 1995 - August 30, 1997

Summary: Mr. Niane took six thesis credits in the Summer 1997 term to complete the degree requirements. PIET conferred with him, and he agreed to depart Tucson on August 28, 1997 for a debriefing in Washington, DC; then to depart the U.S. on August 30, 1997. PIET purchased the return international ticket accordingly from PIO/P funds in June and mailed it to him. On August 20, World Learning/AAI contacted the Mission to inform they had just learned that Mr. Niane was registered in the Fall 1997 semester for a Ph.D. program. This information surfaced when World Learning/AAI contacted University of Arizona to clarify a Summer 1997 tuition matter. World Learning/AAI also learned he had married a U.S. citizen in March 1997 and that the spouse was submitting documentation to request a waiver of the J-1 visa two-year residency requirement.

World Learning/AAI made it clear to the University that Mr. Niane was presently funded only through the second summer session, that he was expected to return to Senegal at the end of August, and that costs for Fall 1997 were not funded by USAID. When asked, Mr. Niane indicated to World Learning/AAI that he had sent a request directly to the Mission to continue in the Ph.D. program. The Mission replied it had not received such a request, it would not authorize funds for that purpose, and that Mr. Niane should return to Senegal as ticketed or be reported as a non-returnee. Mr. Niane hesitated, given his personal commitments, but adjusted his ticket to depart from Tucson on September 29, 1997. World Learning/AAI received and forwarded to the Mission the new itinerary on September 18, 1997. On September 30, 1997 Mr. Niane came to World Learning/AAI for a debriefing. He was ticketed to depart for New York on October 1, 1997

and to arrive in Dakar on October 5, 1997. Linda Walker of AID/G/HCD was kept informed throughout, and since he departed, a non-returnee report was not necessary.

For additional information on training this quarter, please refer to the Attachments.

III. CONCERNS/CONSTRAINTS

A. ADMINISTRATIVE ISSUES

The June to September 1997 period represented a significant transition and start-up time for GTD as a whole. It was complicated by the fact that GTD Delivery Order negotiation for several USAID Missions in Africa extended beyond the June 30th end-of-PIET services. Thus, while World Learning/AAI became responsible for academic monitoring as of July 1, 1997, the lack of timely access to funds impacted on its initial ability to provide services. For Senegal, monthly maintenance allowance (MMA) for the two academic participants could not be processed for August until the Delivery Order was signed on August 1, 1997. Thus, the participants received their funds later than usual. MMA checks are usually received by participants at the end of each month for the next month, so they can meet rent and other time-sensitive financial obligations.

The OST participants were nominated on May 15, 1997 to begin a program June 23rd, without a GTD Delivery Order in place. At the Mission's request, the program began July 7, 1997 under limited pre-contract authorization. This combination of circumstances proved less than ideal, as it entailed financial risks to the contracting team, limited the contractors' ability to incur costs, but still pressed the contractor to deliver high-profile work on short notice.

B. PARTICIPANT ISSUES

Feedback from the OST participants was very positive. They seemed pleased with the quality, content and logistics of the training, and commented that the "training was excellent". They suggested that USAID/Senegal follow up with the Observatoire for the next 12 months to look at the participants' progress and how they use the skills they realized during the training to benefit the Observatoire and apply what they learned. The participants seek continued USAID involvement with CES training and help in fostering the contacts that they made while in the U.S. (Note: monthly academic payment issues are covered above in the Administrative Issues section.)

IV. RECOMMENDED ACTIONS

World Learning makes the following recommendations:

- That USAID/Senegal consider requesting World Learning services to work with the Mission and participants to refine the nomination process, so that it incorporates USAID reengineering goals and requirements. The World Learning team has developed a full set of nomination forms for use by SO teams, nominees, and employing partners, which address the connection of training to achieving Mission Intermediate Results, institutional performance changes expected, action planning, and other results-oriented facets of reengineered training. Forms could be made available in French and/or English for Mission use. The World Learning teams has found the forms very successful in other countries to gather the appropriate mix of information for the Missions, program staff, and training providers, as well as to focus the training on enhancing measurable workplace performance.

- That the Mission provide full nominating information and access to Delivery Order funds to incur costs with one month or more of lead time before short course start dates and at least six weeks ahead for more time-intensive training placements, including OSTs, third country, and tailored training programs. Full nominating information can be easily, comprehensively, and consistently gathered with a custom set of GTD nomination forms as described above.

SUMMARY: Status of GTD Senegal nominations as of 09/30/97

	06/11/97-09/30/97
Pick-ups from other contractor	2
Pending from past quarters	0
N - Nominated this quarter	3
A - Active, still in training this quarter	1
C - Completed this quarter	4
X - Canceled this quarter	0
T - Terminated this quarter	0
P - Pending at end of quarter	0

SECTION FROM CREATIVE ASSOCIATES INTERNATIONAL, INC.
FOR THE QUARTERLY REPORT ON SENEGAL
JULY 1 - SEPTEMBER 30, 1997

ACTIVITIES

Four GTD participants from Senegal took part in training programs during this quarter. Three participants took part in the same short-term training program: an observational study tour called "Public Policy Think Tanks". The fourth was a long-term academic training participant who completed a Masters of Science in Renewable Resources. The programs have been evaluated below according to participant responses from two different evaluation instruments: the Orientation Instrument (OI) and the Training Conclusion Instrument (TCI).

Three participants completed both survey forms; the other only completed a TCI. Certain questionnaire responses are measured numerically according to a seven-point scale. The number seven is always the highest measure, indicating extreme satisfaction, and the number one is the lowest measure indicating the opposite, or complete dissatisfaction. This numerical rating is referred to with a value (V) (e.g. V=6).

PROGRAM HIGHLIGHTS

Observational Study Tour: Public Policy Think Tanks

Adama Diaw, Public Policy Think Tanks, July 7 – August 1, 1997.
Mamadou Gueye, Public Policy Think Tanks, July 7 – August 1, 1997.
Mamadou Mbaye, Public Policy Think Tanks, July 7 – August 1, 1997.

Summary:

Educational Background Information:

Mamadou Mbaye and Mamadou Gueye both indicated on their TCIs that the highest degree they earned before this trip was the equivalent of a U.S. Masters. Adama Diaw reported that his highest degree was the equivalent of a U.S. doctorate. All the participants reported having visited the U.S. previous to this trip, and two (Mbaye and Diaw) had received other training outside Senegal before this program.

Orientations:

All three participants reported attending an orientation program in Senegal prior to their departure. They indicated that USAID representative(s) had taken part in this orientation, and they agreed unanimously that the information they received was extremely useful (V=7). Two of the participants (Diaw and Gueye) reported attending an administrative orientation with a representative of the World Learning team. They both rated this orientation extremely useful (V=7). Only one participant (Gueye) said he attended an orientation at a training facility. He rated this training facility orientation extremely useful.

All three participants reported that they had had enough time to prepare for their departure to the U.S. Two participants (Gueye and Diaw) indicated that they had enough information about their training program at the time they left Senegal, but Mbaye said that he did not have enough information. Specifically, he would have liked to have more information about the content of the training program, descriptions and names of the training facilities, the time allotted for each part of the training program, and USAID regulations, procedures, allowances, and requirements. All three participants indicated that they felt they were sufficiently prepared for their training before the program began.

Language Information:

Each of the participants stated that English is not an official language in their home country. None of the three reported having any difficulties with language during the training or other elements of their trip, for example in sightseeing, restaurants, or shopping. (Note: interpretation services were available to them during their tour.)

Support Services:

All three participants said they knew how to contact the World Learning team responsible for their training while they were at their training facility. Each participant indicated that he was extremely satisfied with his communication with this Monitoring and Support Specialist (V=7). The participants also gave satisfactory ratings (V=5 and above) to the following support services provided by the Monitoring and Support Specialist: U.S. travel arrangements; receipt of allowances in the U.S.; assistance with program and personal matters; and response to emergencies. The only unsatisfactory rating was that of Mr. Gueye, who gave a low rating (V=1) to his receipt of allowances in the U.S. Each of the participants indicated that he was extremely satisfied with his housing during the stay. Mr. Gueye felt that the financial allowances were inadequate, while Dr. Diaw called them somewhat adequate, and Mr. Mbaye was satisfied with the amount of money he received. (It should be noted that in the experience of the evaluator – Creative Associates International, Inc. – most USAID-sponsored participants complain about the size of their financial allowances.)

Social, Cultural, and Recreational Activities:

Regarding extracurricular activities, each of the participants did not complete this section of the TCI. One of the participants (Mbaye), however, indicated that he visited American families in their homes during the program. He said these visits were excellent (V=7). Two of the participants (Diaw and Mbaye) indicated that they made formal or informal presentations to Americans about life in Senegal. The same two participants also reported becoming well acquainted with individual Americans during their stay. The Americans they got to know included World Learning program administrators or interpreters, and host families or other individual Americans. These participants said the acquaintances they made were extremely important to their overall experience in the U.S. (V=7).

All three participants reported having no difficulties adjusting to life in the U.S. They also said they felt very welcome and accepted here (V= 6 and 7).

The Training Program and Its Potential Impact:

The next questions asked of the participants dealt with their participation in the planning of their training and their knowledge of what was expected of them upon their return to their employers. All three participants indicated that they felt they had participated sufficiently in *planning their training program*. All three also said they felt they participated sufficiently in *planning the results expected of them* within their employing institution. All three went on to report that the *results expected of them* within their employing organizations were *explained* to them and were *understood*. Two participants (Diaw and Gueye) reported that it was explained to them how their training program relates to USAID's development goals.

Each of the participants reported being nominated for this training by his supervisor or employer. Mr. Gueye added that his employer recommended the training for him to obtain new skills, because he would be taking on new responsibilities. He also said that he himself feels he needs new skills to obtain a new job in a different institution. (It is interesting to note the following contradiction, however: on his OI, when asked to rate the importance of getting a new or different job as one of his reasons for taking part in the training, Mr. Gueye rated this as a factor that was not at all important [V=1]. Additionally, he indicated on his OI that he did not know what job he would be returning to upon completion of the training, though he did say it would be somewhat related to his field of training.)

On their OIs, the three participants reported that they had worked with their employers to determine the new skills they needed to perform their jobs better; the content of their training program; and the results their training should have on their employing organizations. Each of the participants said on his TCI that his employer defined the objectives of the training for him. Two participants (Diaw and Mbaye) stated that their employers took part in their home country orientation before their departure to the U.S. These same two added that their employers communicated with them while they were on their tour. In this communication, they talked about the grades or

results the participants obtained during the program, professional expectations of the participants upon their return, and changes in professional expectations.

The participants rated the following as the most important reasons for taking part in this program: achieving a particular training objective (V=7, unanimously); increasing their general knowledge in their field (V=7, Diaw and Mbaye); making professional contacts in the U.S. (V=7, unanimously); achieving results or making a contribution to their employing institutions (V=7, unanimously); and contributing to development in Senegal (V=7, unanimously).

All three of the participants reported that they understand extremely well how the training will help them and be useful in carrying out the services their employing institutions provide (V=7). Two of them (Diaw and Gueye) said they understand extremely well (V=7) how the training will help them contribute to the USAID development program for Senegal; Mr. Mbaye indicated this understanding with a lesser degree of certainty (V=4), but all the same, he said he understood how the training will help him contribute to Senegal's development. All three participants reported that they work for the government. Dr. Diaw is an instructor; Mr. Gueye and Mr. Mbaye are both senior managers. Each of the participants reported on his OI that at the end of the training program, he would be returning to the same position. Mr. Gueye indicated on his TCI, however, that his job upon return from training is not related to the field of training, i.e. think tanks.

The participants reported that upon return, they intend to *improve* the services his employing institution provides. Dr. Diaw reported that he intends to *expand* the services as well. Dr. Diaw and Mr. Mbaye both indicated that they intend to *change* the services their employers provide. They all said that most of the changes they intend to make will take place within six months. Each participant said that he and his employer agreed on how he would apply his training. Mr. Mbaye added that he devised his own plan to apply the training. All three of the participants reported that their employers had been involved in forming a Training Agreement specifying the reason for and the purpose of their training.

Each participant said that the training would play a definite role in his ability to achieve changes within his employing organization. Each also reported believing that he is sufficiently prepared to achieve results within his employer. The three participants agreed unanimously that their skills, support from their organizations, and having sufficient resources are the factors that will make the greatest contribution to enhancing the impact they have on their employing institutions. Dr. Diaw and Mr. Mbaye also considered support from their colleagues an important factor, and Dr. Diaw indicated that demand for his institution's services will be another important contribution to the potential impact he can have on his employer. As for impediments to achieving change within their organizations, the participants agreed that resource constraints are a primary concern. Lack of support from top management and external constraints not under their or their organizations' control may also make achieving change difficult, in the opinions of the participants.

The participants indicated unanimously on their TCIs that the level and duration of their training program was just right. They reported that the elements included in their program were the following: lectures; professional contacts or networking; or other unspecified elements. The participants agreed that the training fit both their own professional goals and their employing institutions' goals; that there was enough time allowed to achieve training objectives; that there was enough variety in the program's activities; that the people at the training facilities were adequately prepared; and, that the training was at their own levels of skill. Mr. Gueye indicated that instruments and equipment were an essential aspect of the training program, and he went on to say that most of the equipment was appropriate for application in Senegal. Mr. Mbaye offered his view that the training was divided appropriately between classroom and outside-the-classroom activities, while the other two participants did not complete this question on the TCI.

The participants offered examples of the things they learned during their tour. Dr. Diaw stated that he acquired a greater understanding of the organizational methods and functioning of think tanks in the U.S., and that lessons can be drawn from the organizations he visited. He also mentioned that the possibility of cooperation with the U.S. think tanks he visited was very important to him. Mr. Gueye listed his exposure to the following as being important elements of his tour: the necessity for improvement of procedures and strategies, the necessity for an information system that performs better, and new management methods. Mr. Mbaye mentioned the following observations about think tank management: autonomy of the think tank is necessary; the think tank should be directed with flexibility; informal meetings should be encouraged, (e.g. lunches with colleagues could replace formal meetings);

and, seminars should be held before and after the think tank publishes studies. He added that he will be making changes based on the structure and systems he observed in the think tanks he visited.

The participants listed several intentions for contributions that they plan to make upon their return. Dr. Diaw and Mr. Mbaye both mentioned that they would change the management within their employers to provide more flexibility, autonomy, and informality. Dr. Diaw said that he intends to contribute to his organization's expansion by adding more quality research projects. He would also like to expand his organization's capabilities for networking with research centers in the U.S. Mr. Mbaye stated that certain activities that his organization is involved in could be eliminated to allow for more focus on other projects. He also plans to organize seminars to precede and follow each of his center's published studies.

Lessons Learned:

As mentioned in the orientation section above, one of the participants said that he did not have enough information about content of the training program when it began. This is an orientation issue that might be taken into consideration in future planning activities, however, the other two participants both felt they had plenty of information.

Overall, each of the three participants reported being extremely satisfied with this training program (V=7) and that taking everything into consideration – his professional, personal, cultural, and social experiences as well as his training – he is extremely satisfied with his total experience as a USAID participant (V=7). Each participant felt that of the two kinds of experiences he had during his stay in the U.S. – the training itself and the social, cultural, and personal experiences outside of his training – the training was the more important. All three indicated that they believe their experience as an USAID participant better prepares them to further the goals of their employing institutions. All three said they would recommend their training program to other people in Senegal with similar technical backgrounds and goals.

Mr. Mbaye offered the following comments about his training: "The training has been excellent. USAID should continue to follow my center for the coming year so as to help me in the application of the knowledge and implementation of the things I learned from the training. By 'follow my center' I mean to include its managers in other training cycles if they exist and to help me to maintain the contacts I made." Dr. Diaw wrote that he had learned that "Quality research cannot take place in a coercive and constraining atmosphere." He summed up his views on the training as follows: "I take away from this experience the feeling that investment in education is an extremely important factor for lasting economic development".

Masters of Science Degree in Renewable Resources

Mamadou Niane, Masters of Science Degree in Renewable Resources, University of Arizona, June 1, 1995 – August 31, 1997.

Summary:

Educational Background Information:

Mamadou Niane indicated on his TCI that the highest degree he had earned before this U.S. program was the equivalent of a U.S. Masters. He reported having never visited the U.S. or received training outside Senegal before this trip.

Orientations:

Mr. Niane reported attending three orientations as preparation for his Masters program: one in Senegal prior to his departure, one administered by Partners for International Education and Training (PIET) upon his arrival in the U.S. in 1995, and another at the University of Arizona. He rated his in-country orientation extremely useful (V=7), his PIET U.S. orientation moderately useful (V=4), and his orientation at the University of Arizona very useful (V=5).

Mr. Niane reported that he had not had enough time to prepare for his departure to the U.S. Mr. Niane also indicated that he had not received enough information about his training program at the time he left Senegal. Specifically, he would have liked to have more information about the content of the training program; descriptions and names of the training facilities; and USAID regulations, procedures, allowances, and requirements. (Note that while Mr. Niane's program is being evaluated under GTD, he began his training as a PIET participant.)

Language Information:

Mr. Niane stated that English is not an official language in his home country. He did not report any great difficulties with language during his time in the U.S., but he did mention some difficulty with the following aspects of his academic program: understanding trainers or lecturers, understanding presentations at site visits, understanding written training materials, taking notes, using technical vocabulary, writing papers or reports, and understanding informal conversation. Mr. Niane reported that he had no problems with language in the non-academic elements of his stay in the U.S., (e.g. in using public transportation, sightseeing, eating in restaurants, shopping, or communicating with friends and colleagues).

Support Services:

Mr. Niane said he knew how to contact the World Learning team responsible for his training while he was at the University of Arizona. He indicated that he was extremely satisfied with his communication with his Monitoring and Support Specialist (V=7). Mr. Niane also indicated a high degree of satisfaction (V=6 and 7) with the following support services provided by World Learning/AAI: U.S. travel arrangements; receipt of allowances in the U.S., assistance with program matters; and response to emergencies. He said that he was very satisfied with his housing during the stay (V=6). Mr. Niane felt that the financial allowances were inadequate.

Social, Cultural, and Recreational Activities:

Regarding extracurricular activities, Mr. Niane indicated that he had a busy social schedule which included the following activities: participating in community events; participating in or going to sporting events; going to picnics, parties, or dances; going to movies, concerts, or plays; and, sightseeing. In general, he found these activities extremely enjoyable (V=7). He also reported that he visited American families in their homes during his program. He said these visits were excellent (V=7). He reported that he made formal or informal presentations to Americans about life in Senegal. He said he became well acquainted with individual Americans during his stay, and he said the acquaintances he made were extremely important to his overall experience in the U.S. (V=7).

Mr. Niane reported no great difficulties adjusting to life in the U.S. He indicated, however, that he did feel somewhat homesick, and that he did have a little difficulty in adjusting to the food. He also said he felt extremely welcome and accepted here (V=7).

The Training Program and Its Potential Impact:

Mr. Niane indicated that he felt he had participated sufficiently in *planning his training* and in *planning the results expected of him* within his employing institution. He went on to report that the *results expected of him* within his employing organization were explained to him, and Mr. Niane reported that he felt he *understood* what his employer expected of him prior to beginning the training. He reported that it was not explained to him how his training program relates to USAID's development goals.

Mr. Niane stated that his employer took part in his home country orientation before his departure to the U.S. He added that he and his employer communicated monthly while he was away. They talked about the content of his training program; professional expectations of him upon his return; changes in professional expectations; and, changes within the company's organizational environment that took place while he was away. He also reported keeping in touch with colleagues in Senegal while he was in the U.S.

Mr. Niane rated the following as the most important reasons for his taking part in this program: achieving a particular training objective (V=7); increasing general knowledge in his field (V=7); making professional contacts in

the U.S. (V=7); obtaining a diploma (V=7); and, achieving results or making a contribution to his employing institution (V=7). He indicated that he considered getting a new or different job an important reason as well (V=4).

Mr. Niane reported that he understands extremely well how the training will help him to contribute to the services his employing institution provides (V=7). He said he understands equally well how the training will help him contribute to the USAID development program for Senegal (V=7). Mr. Niane affirmed that the training will be useful in carrying out the services his employer provides. He said that his program was extremely relevant to both his employing institution's goals and to his personal career plans. Mr. Niane reported that before coming to the U.S., he worked in the private sector for a small business, the ownership of which he shared. He reported that at the end of his training he would return to the same employer, but to a different position.

Mr. Niane indicated that he intends to improve upon, expand, and change the services provided by his employing institution. He also intends to expand his company's budget. He said that most of the changes he intends to make will take place within six months. He indicated that he did not have a Training Agreement that specifies the reason for and the purpose of his training.

Mr. Niane said that the training would play a definite role in his ability to achieve changes within his employing organization. He reported feeling that he is somewhat prepared to achieve results within his employer. He indicated that his skills; support from his organization, government, community, and colleagues; having sufficient resources; and demand for his company's services are the factors that will make the greatest contribution to enhancing the impact he has on his company. As for impediments to achieving change within his organization, he indicated the following: his skills and knowledge are still insufficient; there are skills deficits among his colleagues; his company faces resource constraints; and, other external constraints that are beyond its control.

Mr. Niane indicated that the level of his academic program was just right. He also indicated, however, that the duration of the training was too short. He reported that the elements that were included in his program were the following: lectures; seminars; special courses; workshops; large group discussions or projects; small group discussions or projects; working with colleagues or peers; management training; leadership training; and professional contacts or networking. Mr. Niane reported that the training fit his professional goals and his employing institution's goals; that there was enough variety in the program's activities; that the people at the training facilities were adequately prepared; and, that the training was at his own level of skill. Mr. Niane also felt, however, that there was not enough time allowed to achieve training objectives. Mr. Niane indicated that instruments and equipment were an essential aspect of the program, and he went on to say that most of the equipment was appropriate for application in Senegal. He offered his view that the training was divided appropriately between classroom and outside-the-classroom activities.

Mr. Niane offered a synopsis of the focus of his studies in the U.S. He stated that he focused on the field of natural resources management in local communities using geographic information systems (GIS). He said that this gives him the opportunity to build tools that allow managers to better manage natural resources using local pedagogical materials (e.g. a local database).

Mr. Niane indicated that he believes his U.S. training will be extremely useful in helping him to bring about change in his company. He mentioned the following intention as a contribution that he plans to make upon his return: besides improving and expanding the services his company provides, he also intends to work with any other agency or institution whose goals and objectives he can support.

Lessons Learned:

This participant had a few complaints about the planning and orientation aspects of his program. He reported that he had not had enough time to prepare for his departure to the U.S. He also indicated that he had not received enough information about his training program at the time he left Senegal. (It is important to note, however, that while Mr. Niane's program is being evaluated under GTD, he began his training as a PIET participant.)

Mr. Niane also took the time to explain that he felt there was a major problem in PIET's planning of training at the time he began his program. He says, "The major problem we found is that [PIET] did not have the best information about the academic institutions we wanted and that are available. Therefore, lots of students lost their scholarships or went back without a diploma". He also mentioned that sometimes it is very difficult to complete an academic program in two years or less, and since the requirements of various programs differ, the amount of time required to complete academic programs also differs. He said that the USAID funding is not flexible enough to allow students to finish their studies. His last comment was that if USAID will not be able to provide the necessary funding for a student to finish studies he or she has already begun, the university will not allow any other sources to provide the funding for the student to complete the degree program.

Overall, Mr. Niane reported being extremely satisfied with this training program (V=7). He said that taking everything into consideration – his professional, personal, cultural, and social experiences as well as his training – he is extremely satisfied with his total experience as a USAID participant (V=7). Mr. Niane felt that the training itself was more important than the social, cultural, and personal experiences outside of his training. He indicated that he believes his overall experience as a USAID participant better prepares him to further the goals of his employing organization. He also said he would recommend his training program to other people in Senegal with similar technical backgrounds and goals.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/GUINEA BISSAU
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 809
Effective Dates: 07/01/97 - 12/31/98
Contract Total: $65,233
Obligated Amount: $65,233

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors (The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure), from July 1 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 809, with the U.S. Agency for International Development.

The report is organized as follows: Summary, Activities, Concerns/Constraints, and Recommended Actions. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

On August 18, 1997, on behalf of USAID/Guinea Bissau, REDSO/WCA issued a pre-contract authorization, at World Learning's request, authorizing World Learning to incur administrative and participant costs for the period July 1 through September 30, 1997 to monitor two academic participants already in the U.S. The pre-contract authorization was needed owing to the absence of a GTD Statement of Work from USAID/Guinea Bissau following the end of monitoring services by Partners in International Education and Training (PIET), June 30, 1997. The two academic participants had been handled under the PIET contract.

On September 5, 1997 the GTD Delivery Order Manager for this activity received communication from Esther Addo, REDSO/WCA, relaying a request she had been trying to send since August 25, 1997. This communication assumed that the GTD Delivery Order had been signed and advised that the Embassy in Guinea Bissau wanted to send a group of parliamentarians to the U.S. on a study tour to look at examples of small town council government and had requested that REDSO suggest how it could be done. REDSO suggested an amendment to the Delivery Order to include the activity.

On September 11, 1997, World Learning responded to advise REDSO that only a pre-contract authorization for the two academic participants had been received, but not a Statement of Work. World Learning informed REDSO that, in order to proceed with new work, a Statement of Work, proposal response with budget, and a signed Delivery Order would be needed. The following day, REDSO/WCA sent World Learning a Statement of Work to provide services required to complete the on-going training programs of the two academic participants, Messrs. Benicio Casiano and Jose Cali.

On September 16, 1997, World Learning was informed that the request to arrange a study tour for the parliamentarians was not included in the issued Statement of Work, because no funds had been obligated for that activity. Mr. Ousmane Faye, Contracting Specialist, requested that World Learning only respond to the Statement of Work for the two academics already in the U.S. Within three days, World Learning submitted a proposal and budgets according to REDSO/WCA instructions. The Delivery Order was signed September 30, 1997.

On September 25, Nancy McKay, USAID/Guinea Bissau, sent World Learning a request for an observation study tour in telecommunications technology and an intensive English program not to exceed three months. Action on this request and any other new work is pending receipt of a modified Statement of Work.

II. ACTIVITIES

Beginning in Fall 1996 and throughout the first six months of 1997, USAID/G/HCD, PIET, and World Learning sent the Mission several messages regarding the end of the PIET contract and the need to prepare a Statement of Work for a GTD contractor. USAID/G/HCD requested that GTD contracts be in place by March 31. When it became clear that, due to the status of NMS and other factors, GTD contracts would not be fully signed by March 31, PIET was allowed to continue monitoring services through June 30, 1997. Thus, it was imperative that GTD contracts be fully negotiated by the end of June.

On July 1, World Learning sent USAID/Guinea Bissau another inquiry regarding the status of its GTD delivery order as PIET needed to transfer monitoring responsibility for two academic participants to a GTD contractor. From July 14-18, USAID/G/HCD held a Conference on Human Capacity Development in Washington, DC. Gilbert Pouho, Training Officer, USAID/Guinea Bissau and Esther Addo, Human Resources Specialist, REDSO/WCA, were in attendance. At that time, Debra Egan and Laurie Treleven of World Learning's GTD staff again brought to attention the urgent need for a Statement of Work to support the two academic participants who were earlier monitored under the PIET contract. In June, PIET had provided monthly maintenance allowance for July, but by the end of July, the situation became quite time sensitive, as there was no means to provide August maintenance or pay other expenses. World Learning requested pre-contract authorization to make necessary payments.

Upon receipt of the pre-contract authorization on August 18, the GTD staff immediately processed maintenance payments. By this time, the participants' financial situation had become serious, as the timing coincided with their need to move out of on-campus housing, which PIET had formerly paid directly with tuition. Because the participants would be living off campus, they needed funds in order to pay rent, utilities and security deposits. World Learning/AAI proceeded with monitoring services and responded to the Statement of Work.

PROGRAM HIGHLIGHTS:

Mr. Casiano Benicio, English Language Training (ELT), St. Michael's College, Colchester, VT, followed by Associate's Degree Business Administration, University of Wisconsin Green Bay, Green Bay, WI, January 14, 1996 - May 31, 1998

Mr. Benicio is doing very well in his course work and is currently maintaining a 3.3 GPA after three terms in his academic degree program. He took a very heavy course load, six classes for a total of 16 credit hours in the Summer term: "Micro Economic Analysis", "Micro Economic Lab", "ESL Reading and Expository Writing II", "World Politics", "Introduction to Sociology" and "Micro Computers - End User Applications". According to his latest Academic Enrollment and Term Report (AETR), Mr. Casiano is taking five courses in the Fall: "Intermediate Macro-Economic Theory", "Public Finance-Fiscal Policy", "Expository Writing", "Introduction to Environmental Sciences" and "Foundation of Western Culture II".

As indicated below in the summary for Jose Cali, both students had to move off-campus in August due to unavailability of on-campus housing where they had been residing. Mr. Benicio also informed the Monitoring Specialist that his academic advisor had written a letter in support of continuation of his studies beyond an associate's degree. The Monitoring Specialist advised him that the Mission had indicated it would not be able to fund him beyond the associate's degree but asked him to forward the letter to World Learning/AAI for his file and for the Mission's reference.

Mr. Casiano is expected to complete the associate's degree on time in May 1998.

Mr. Jose Cali, English Language Training (ELT), St. Michael's College, Colchester, VT, followed by Associate's Degree, Accounting, University of Wisconsin - Green Bay, January 14, 1996 - December 31, 1998

Mr. Cali is making fair academic progress and holds a 2.18 GPA after two academic terms. A minimum 2.0 GPA is required for graduation. According to his university transcript for Summer 1997, he completed three courses for nine credits: "Intermediate Algebra", "Astronomy" and "American Government and Politics". It should be noted that at the associate's degree level, a number of general education credits must be taken outside the academic area of emphasis; hence courses in the sciences and in government.

On August 4th, the Monitoring Specialist (MS) received a fax from Mr. Cali regarding three concerns he had about his program. First, he indicated that he had to vacate his on-campus housing effective August 1, 1997. He also felt he was not getting the academic advising services he needed in order to effectively pursue his program and to keep World Learning/AAI updated on his progress and estimated completion date. Third, Mr. Cali indicated that he has not been able to receive the training in accounting that he feels he needs in addition to business administration.

The MS sent a fax to USAID/Guinea Bissau to address Mr. Cali's concerns. The MS had learned that the University of Wisconsin, like many schools, closes its on-campus dormitories during part of the summer months when most students are not in classes. In addition, the University Housing Office indicated it was unlikely enough spaces would open up to accommodate the two students. The MS worked with Mr. Cali and Mr. Benicio to resolve the housing issue; the two participants moved into off-campus housing in mid-August. They are now sharing an apartment. During phone conversations with GTD staff, participants have indicated the housing is satisfactory and is located a short bus-ride from the campus.

The MS also worked with Ms. Nancy Long and Professor Salsbury, University of Wisconsin - Green Bay to ensure that Mr. Cali was able to register for the classes he needed to take in the Fall term and to complete a comprehensive plan of study through the end of his academic program. With help from Professor Salsbury, Mr. Cali was able to register for a course that will provide him with the background that he seeks: "Introduction to Accounting". In addition, in Fall 1997 Jose is taking "Introduction to Business Statistics", "Macro Economic Analysis", and two general courses required for the associate's degree: "Expository Writing' and "Roots of Black America". Professor Salsbury has confirmed that he will continue to provide any advising that Mr. Cali will need.

World Learning/AAI was pleased to learn that Mr. Cali was able to take an accounting course in order to get the accounting background he requires. However, World Learning/AAI is still working with Mr. Cali and the University of Wisconsin to solidify his plan of study through his completion date. Mr. Cali and the advising staff at the University have had difficulty putting together a cohesive plan of study due to the number of variables, including availability of electives and changes in course schedules. World Learning/AAI will continue to work with Mr. Cali and the University of Wisconsin to monitor his progress and to have it clearly understood he is expected to complete the associate's degree by December 1998. Thus far, the University and Mr. Calihave indicated a possible later completion date.

For information on participant training costs during these this quarter, please refer to the Appendix, which lists each participant's training program, dates, proposal budget amount and expenses paid this quarter.

III. CONCERNS/CONSTRAINTS

A. ADMINISTRATIVE ISSUES

Effective provision of monitoring services was initially constrained during this quarter by the lack of a Statement of Work or an authorization to expend funds. Fortunately, the Monitoring Specialist from PIET was able to provide continuity and keep in contact with the participants, since he continued to work on the World Learning GTD contract.

The Delivery Order ceiling price is signficantly less that the cost proposal submitted by World Learning. The current amount does not sufficiently fund minimal anticipated participants costs for the two students to complete their degrees. Nor does the amount funded cover necessary time and administrative expenses in 1999 to close out the contract and pay 1998 taxes.

B. PARTICIPANT ISSUES

The main issues for the participants during this quarter were the transition from on-campus to off-campus apartment living and the delay in receipt of August allowances. In addition, there are other issues that need further attention in the coming quarter as indicated in the Program Highlights: Mr. Cali's timely completion of the associate's degree; the availability of elective space for him in accounting courses which are required for other students and thus, fill up quickly; and his academic performance, particularly in U.S.-focused courses outside of business administration.

IV. RECOMMENDED ACTIONS

The World Learning team makes the following recommendations:

- That USAID/Guinea Bissau, through REDSO/WCA, increase funding of this D.O. to cover necessary costs. World Learning/AAI will carefully review participant budgets, adjust for any optional or supplementary activities, and inform REDSO and the Mission of the anticipated minimum amount required to cover participant costs. World Learning will also resubmit administrative budgets, including costs through June 1999 for contract close out and participant tax filing.

- That the Mission prepare an official memo, for World Learning/AAI to forward to the participants and officials at the University, to inform regarding the upcoming closing of the Mission and to clarify date and academic degree program limits through which the Mission will provide funding. The message should specify the responsibility of participants on a J-1 visa to return home promptly upon completion of the USAID-funded period of studies. Such a communication has been routinely provided when a closing Mission, such as Zaire or Cape Verde, still has funded academic participants in U.S. training.

GTD/Guinea Bissau D.O. 1997 PARTICIPANTS
U.S. TRAINING
World Learning Status Report for the Quarter 07/01/97 - 09/30/97

Participant Name	Training Institution	Dates	GTD Proposal* Budget
1. Casiano Benicio	St. Michael's College-ELT University of Wisconsin-Green Bay	1/14/96-8/31/96 9/1/96-5/31/98	$33,135.00
2. Jose Cali	St. Michael's College-ELT University of Wisconsin-Green Bay	1/14/96-12/31/96 1/1/97-12/31/98	$52,048.00

*NOTE: The full GTD proposed participant budgets were not funded in the ceiling price of the Delivery Order.
Revised, reduced budgets will be submitted for REDSO and Mission review by December 1997.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/MALAWI
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 811
Effective Dates: 07/01/97 - 05/31/98
Contract Total: $832,906
Obligated Amount: $832,906

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors, The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure from July 1, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 811, with the U.S. Agency for International Development.

The report is organized as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions**. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

On June 13 World Learning received a GTD Statement of Work for USAID/Malawi from USAID/RCSA/Botswana. The SOW requested services for four of the Mission's five Strategic Objectives (SOs):

SO1 Increased agricultural incomes on a per capita basis
SO3 Increased adoption of measures that reduce fertility and risk of HIV transmission, including improved child health practices
SO4 Increased access to, and quality and efficiency of basic education, especially for girls
SO5 Institutional base for democratic participation strengthened and broadened

Placement and monitoring services were requested as follows:

SO1 6 short term U.S. participants
SO3 9 academic U.S. participants (monitor only, transferred from PIET)
16 short term U.S. participants
8 short term Third Country participants
SO4 1 academic U.S. participant (monitor only, transferred from PIET)
SO5 4 short term U.S. participants
44 participants TOTAL

The SOW also requested that the contractor prepare a training plan, based on inputs from the SO teams and in consultation with the Human Capacity Development Officer (HCDO).

World Learning submitted a proposal and budgets to RCSA/Botswana and the Mission on June 30.

Following a request from World Learning, on August 8, 1997, RCSA/Botswana issued a very limited pre-contract authorization of $18,926, equivalent to two months of participant monthly maintenance allowance (MMA) at August 1997 rates for eight participants and one month of MMA for two participants who were completing and departing the U.S. in August.

A further exchange of correspondence took place, as RCSA/Botswana requested budgets be broken out by SO and that funds for follow-on training be included in the participant budgets.

As of September 30, 1997, the contract was not yet signed.

II. ACTIVITIES

On July 1, 1997, the World Learning team picked up monitoring responsibility for 10 Malawian academic participants transferred from the Partners for International Education and Training (PIET) contract. This responsibility was not accompanied at the same time by funds access to provide basic monitoring services, a situation which added significant pressure to the first quarter GTD transition period. From late July through the first week of August, AAI programming staff fielded dozens of calls a day from participants, academic advisors, foreign student advisors and other university staff, inquiring about the status of maintenance and other payments. Malawian participants experienced the anxiety of not knowing whether funds would arrive in time to meet a variety of commitments, including settling U.S. financial affairs (for those completing mid-August) and paying rent and utilities.

The same day that the pre-contract authorization was received, World Learning/AAI mailed maintenance checks via overnight courier delivery. Nonetheless, some Malawian students were assessed late rent fees or had other financial consequences. Mid-August through September, World Learning/AAI took actions to restore confidence among participants whose monitoring services had been affected and to establish myriad systems and forms adapted to the new contracting mechanism, incorporating USAID reengineering requirements. Through September 30, 1997, vendor invoices, including tuition payments, were held awaiting a fully signed Delivery Order, because the limited pre-contract authorization did not provide sufficient funds to both release vendor payments and to meet immediate participant payment needs.

PROGRAM HIGHLIGHTS

M.S. Applied Demography

Mr. Thomas Bisika, M.S. Applied Demography, Georgetown University, Washington, DC, August 23, 1996 - August 20 , 1997

Summary: Mr. Bisika completed his coursework and drafted his thesis in only twelve months and returned home in August 1997. Prior to his departure, Mr. Bisika turned in his thesis research paper to his advisor and applied for graduation. Once his paper is accepted by his advisor and the Department, his diploma will be issued. He worked at an intense pace to complete the degree in such a short period of time.

M.Ed., Technical Vocational Education

Ms. Dora Mwalwenge, Master of Education, Vocational Technical Education, University of Illinois, Urbana-Champaign, Urbana, IL, August 9, 1995 - August 21, 1997

Summary: Ms. Mwalwenge successfully completed the requirements for her master's degree and returned home to Malawi in August 1997.

Master of Public Health (MPH)

Ms. Gertrude Kara, MPH, Tulane University, New Orleans, LA, August 11, 1996 -December, 1997

Summary: Ms. Kara is enrolled in the Reproductive Health Track in the International Health and Development Department. As of the end of the second summer session, Ms. Kara completed her course

requirements; thus, in Fall 1997 she is working on her capstone, a final requirement for the MPH degree at Tulane. World Learning/AAI awaits further information from Ms. Kara and the University regarding capstone proposal details. Over the two summer sessions, she took seven courses: "Ethnic Conflict and Conflict Resolution"; "Design and Management of Information Systems"; "Adolescent Health in Developing Countries"; "Resource Development and Grantsmanship"; "International Health Policy"; "Environmental Health for Developing Countries"; and, "Managing Health Care in Developing Countries".

Master of Public Health (MPH)

Mr. Jonathan Nkhoma, MPH, Tulane University, New Orleans, LA, August 11, 1996 - December, 1997

Summary: Over the Summer, Mr. Nkhoma took three courses: "Ethnic Conflict"; "Environmental Science for Developing Countries"; and, "Program Management in International Settings". Mr. Nkhoma performed well, earning two B grades and one A. He is enrolled in the zero credit capstone, and is working to fulfill the requirements for the required capstone internship experience in Fall 1997. With the capstone, he will complete the requirements for the MPH, Communication and Behavioral Science Track, in the International Health and Development Department.

Mr. Nkhoma advised World Learning/AAI of his hopes to undertake a portion of his required capstone practical experience outside of New Orleans. Mr. Nkhoma requested to travel to Atlanta, GA to work at Emory University in its Program Against MicroNutrient Malnutrition (PAMM) for approximately one month. World Learning/AAI is working with Mr. Nkhoma to confirm when PAMM will be able to host him. As soon as the details and timing for Mr. Nkhoma's capstone are confirmed, they will be forwarded to the Mission for review and approval.

Mr. Nkhoma has done well in his academic program. He is expected to complete his degree requirements and return to Malawi a month earlier than anticipated, by November 1997. Once the capstone activity dates are confirmed, World Learning/AAI will coordinate return travel arrangements with Mr. Nkhoma.

Master of Public Health

Mr. Robert Ngaiyaye, MPH, Tulane University, New Orleans, LA, August 11, 1996 - December, 1997

Summary: Mr. Ngaiyaye's concentration in the International Health and Development Department is Communication and Behavioral Science. Over the Summer he took four classes: "Management in International Settings"; "Formal Qualitative Studies"; "Adolescent Health for Developing Countries"; and, "Environmental Health". In Fall 1997, he is taking one final course for degree credit, "Mass Media in Health", and is enrolled in the zero credit capstone, which is required for graduation. He also chose to audit two courses at no additional cost for zero credit, "Health Policy" and "Introduction to Population Studies".

Mr. Ngaiyaye is scheduled to complete on time, December 1997. AAI program staff received a request from Mr. Ngaiyaye to pursue a portion of his required capstone internship with the UNFPA in New York City on September 22, 1997.

He indicated that as part of MPH degree requirements, all students who do not opt for a thesis are required to do a capstone/internship for 300 hours. His academic advisor recommended he use his capstone to develop a Social Mobilization and Advocacy document for Malawi and work at an agency that can provide practical experience in that field for his capstone.

Mr. Ngaiyaye advised that in his current job as director of IEC programs in NFWCM, he makes management decisions regarding Family Planning and Population IEC programs in Malawi. Since UNFPA is a major donor in the population field in Malawi and has been closely associated with NFWCM and as a major donor, he requested to work there to gain experience to complement his studies and help him to implement population programs upon return to Malawi.

World Learning/AAI will contact UNFPA to confirm internship opportunity dates and estimated costs, then will forward this complete request to the Mission for review/approval. World Learning/AAI will continue to work with Mr. Ngaiyaye to facilitate his completion of the capstone and prepare for return to Malawi.

M.S. Nursing Administration

Ms. Anna Molly Chinombo, M.S. Nursing Administration, University of Pennsylvania, Philadelphia, PA, August 11, 1996 - December 1997

Summary: Ms. Chinombo is doing very well in her program. She anticipates completing her degree by December 1997, earlier than originally anticipated, as she has taken a higher than average courseload per term. According to her Spring Academic Enrollment and Term Report (AETR), she took five courses in Spring 1997: "Nursing Economics", "Negotiations", "Nursing Administration III", "Business of Nursing", and 'Quality of Nursing Care". She received A's in all her courses and achieved a 4.0 GPA that term. Over the summer, Ms. Chinombo took "Allocating Resources: Economic, Technical and Human", "Organizational Culture and Learning", "Research Methods, Design", "Nursing Administration", and "Independent Study". World Learning/AAI will work with Ms. Chinombo this Fall to finalize her return travel arrangements.

M.S. Nursing Administration

Ms. Lucy Kachapila, M.S. Nursing Administration, University of Pennsylvania, Philadelphia, PA, August 11, 1996 - December 1997

Summary: Ms. Kachapila is doing very well in her program and is also expecting to complete her degree one semester earlier than originally anticipated, by December 1997. Ms. Kachapila took five courses over the Summer according to her AETR: "Introduction to Research Methods and Design", "Nursing Administration Practicum", "Independent Study in Nursing", "Dynamics of Organizational Politics", and "Power and Allocating Resources". She achieved a GPA of 3.8. Ms. Kachapila is taking four courses this Fall -- "Managing Change", "Health Care Marketing", "Leadership in an Organization", and "Building Effective Organizations, Getting Things Done". World Learning/AAI will also work with Ms. Kachapila on her final program completion.

MPH Health Education

Ms. Catherine Chiphazi, MPH Health Education, Emory University, Atlanta, GA, August 23, 1996 - May 1998

Summary: Ms. Chiphazi is doing well in her program and is scheduled to complete on time, May 1998. In Spring 1997, she took five courses: "Measurement"; "Curriculum and Instruction in Health Education"; "Community Needs Assessment"; "Introduction to Health Care Management"; and, "Health Education Seminar". Ms. Chiphazi took three courses over the Summer session. She is currently enrolled in six courses for a total of 13 credit hours. According to participant's latest AETR, she is taking: "Conduct and Design of Evaluation"; "Health Education Protocol Preparation"; "Health Education Seminar"; "Thesis"; "International Policy"; and, "Family Planning Program Management".

MPH Health Education

Ms. Joyce Mbwana, MPH Health Education, Emory University, Atlanta, GA, August 11, 1996 - May 1998

Summary: Joyce Mbwana departed the U.S. on August 9, 1997 for Malawi to undertake research for her thesis. She returned to the U.S. on September 5, 1997. The AAI programmer forwarded Ms. Mbwana's request for research travel to the Mission for consideration. USAID/Malawi did not approve to fund her research trip to Malawi. She still chose to undertake the trip and paid her own costs for international travel and in-country research expenses. As per USAID regulations, for the period she was out of the U.S., she did not receive monthly maintenance allowance (MMA).

Upon her return to the U.S., Ms. Mbwana indicated that she had spoken with the Mission while in Malawi and received tentative Mission concurrence to reimburse some, though not all of the expenses she incurred for her research trip. The AAI programmer emailed the Mission requesting clarification on which expenses Mission will agree to reimburse and, as of September 30, awaits a response.

In addition, Ms. Mbwana has indicated a desire to bring her husband to the U.S. to stay with her for the last semester of her USAID program. The AAI programmer discussed this with Ms. Mbwana and informed her of the required paperwork for her dependent's request. She has indicated she will complete this paperwork and forward it to programmer for Mission's consideration.

Ms. Mbwana is doing well in her academic program and achieved a 3.8 GPA over the Summer, taking three courses: "Health Education, Practical Preparation"; "Health Education and Communication"; and, "Health Education - Seminar". This Fall, Ms. Mbwana is taking 6 courses for a total of 13 credit hours: "Design and Conduct of Evaluation Research"; "International Health Policy"; "Perspectives of Environmental Health"; "Health Education Seminar"; "Thesis"; and, "Family Planning Program Management". She is on-target to complete as scheduled, May 1998.

MPH International Health and Epidemiology

Mr. Pascal Mkanda, MPH International Health and Epidemiology, Emory University, Atlanta, GA, August 23, 1996 - May 1998

Summary: Mr. Mkanda is doing well in his academic program. He is currently scheduled to complete on-time in May 1998. He took two courses over the Summer and achieved a 4.0 GPA and has a 3.62 GPA overall. This Semester he is taking four courses: "International Health Management"; "Nutrition Education Seminar"; "Key Issues in Global Health"; and, "Social Behavior in Public Health".

For additional information on training costs during this quarter, please refer to the Attachment, which lists each participant's training program, dates, budget and expenses paid this period.

III. CONCERNS/CONSTRAINTS

A. ADMINISTRATIVE ISSUES

The World Learning team found the time between receiving the Scope and the date academic monitoring was to begin, 12 workdays, insufficient to put a Delivery Order in place, and it found it problematic to effectively provide monitoring services without access to funds. World Learning/AAI notes the six week time lag between the required assumption of monitoring duties July 1, due to the end of PIET monitoring June 30, and the pre-contract authorization August 8, as well as the limited amount of the authorization, placed unnecessary burdens on participants, whose funding was intended to continue uninterrupted, and on staff.

The World Learning team remains ready to carry out the in-country training plan services requested as soon as the contract is signed, so the flow of nominations can begin. However, the relatively short period of the Delivery Order and the fact that it is not fully executed as of September make it unlikely the requested volume of U.S. or third country participants will be nominated and will be able to complete training in the few months of 1998 presently available in this Delivery Order.

B. PARTICIPANT ISSUES

The World Learning team congratulates the two participants who completed their degrees this quarter. As indicated in the Program Highlights, during the next quarter, when the three students at Tulane submit further information about their proposed capstone plans and costs, and the two students who desire to have their dependents accompany them forward the required documentation, the AAI programmer will relay the information for Mission consideration. Five of the remaining eight Malawian participants expect to complete their programs and return

home by December 1997. The AAI programmer's experience is that intensive, attentive monitoring is generally required during the final academic term to address requests and U.S. exit/re-entry issues.

IV. RECOMMENDED ACTIONS

The World Learning team makes the following recommendations:

- That the Delivery Order be fully executed as soon as possible, so full services can be provided, including scheduling the in-country training plan services.

- That a Delivery Order extension process commence as soon as possible, so there will not be a break in services and so that full services requested can be provided, including participant training follow-on services.

ATTACHMENT 1

SUMMARY: Status of GTD Malawi nominations as of 09/30/97

U.S. TRAINING
07/01/97 - 09/30/97

	SO1	SO3	SO4	SO5
Pick-ups from other contractor	0	9	1	0
Pending from past quarters	0	0	0	0
N - Nominated this quarter	0	0	0	0
A - Active, in training this quarter	0	7	0	0
C - Completed this quarter	0	2	1	0
X - Canceled this quarter	0	0	0	0
T - Terminated this quarter	0	0	0	0
P - Pending at end of quarter	0	0	0	0

THIRD COUNTRY TRAINING
07/01/97 - 09/30/97

	SO1	SO3	SO4	SO5
Pick-ups from other contractor	0	0	0	0
Pending from past quarters	0	0	0	0
N - Nominated this quarter	0	0	0	0
A - Active, in training this quarter	0	0	0	0
C - Completed this quarter	0	0	0	0
X - Canceled this quarter	0	0	0	0
T - Terminated this quarter	0	0	0	0
P - Pending at end of quarter	0	0	0	0

SECTION FROM CREATIVE ASSOCIATES INTERNATIONAL, INC.
FOR THE QUARTERLY REPORT ON
MALAWI (JULY 1 - SEPTEMBER 30, 1997)

ACTIVITIES

An evaluation summary is provided for one GTD participant from Malawi who took part in a long-term, academic training program that concluded during the quarterly reporting period between July and September 1997. The program has been evaluated below according to the participant's responses the Training Conclusion Instrument (TCI).

Certain questionnaire responses are measured numerically according to a seven-point scale. The number seven is always the highest measure, indicating extreme satisfaction, and the number one is the lowest measure indicating the opposite, or complete dissatisfaction. This numerical rating is referred to with a value (V) (e.g. V=6).

PROGRAM HIGHLIGHTS

MS in Applied Demography

Thomas Bisika, MS in Applied Demography, Georgetown University, August 26, 1996 – August 20, 1997.

Summary:

Educational Background Information:

Thomas Bisika indicated on his TCI that the highest degree he had earned before this U.S. program was a Bachelors. He reported having had other training outside the Malawi before this program, but he had never visited the U.S. previously.

Orientations:

Mr. Bisika reported attending an orientation program in Malawi prior to his departure. He indicated that USAID representative(s) and former USAID participants from Malawi had taken part in this orientation. He indicated that the information he received was extremely useful (V=7). Mr. Bisika also reported attending a World Learning orientation and an orientation at Georgetown University. He rated the World Learning orientation extremely useful (V=7), but was only moderately satisfied with the orientation he had at Georgetown (V=4).

Mr. Bisika reported that he had not had enough time to prepare for his departure to the U.S. He also indicated that he had not had enough information about his training program at the time he left Malawi. Specifically, he would have liked to have more information about the goals and content of his training program, its overall length, and the expected results of his training for his employing institution. He added that at that time, he did not know whether he was coming to the U.S. for a Master of Science degree or a Masters in Public Health. He said, however, that he felt sufficiently prepared for the training before the program began.

Support Services:

Mr. Bisika said he knew how to contact the World Learning/AAI Monitoring and Support Specialist responsible for his training while he was at his training facility. He indicated that he was extremely satisfied with his communication with the Monitoring and Support Specialist (V=7). He also gave highly satisfactory ratings (V=7) to the following support services provided by the AAI Monitoring and Support Specialist: U.S. travel arrangements; receipt of allowances in the U.S.; and assistance with program and personal matters. He indicated that he was moderately satisfied with his housing during the stay (V=4). Mr. Bisika felt that his financial allowances were adequate, though he did offer his opinion that "World Learning should not always have to seek approval from Malawi even for obvious expenditures."

Social, Cultural, and Recreational Activities:

Regarding extracurricular activities, Mr. Bisika reported that he went to picnics, parties, or dances; movies, concerts, or plays; and that he went sightseeing. He indicated that he found these activities extremely enjoyable (V=7). He also said he visited American families in their homes during the program and that these visits were excellent (V=7). He indicated that he made formal or informal presentations to Americans about life in Malawi, but that he did not become well acquainted with individual Americans during his stay.

This participant reported great difficulties adjusting to life in the U.S.; for example it was very difficult for him to adjust to the food. He also reported great difficulty with feeling homesick, lonely, and isolated from developments in his employing institution. He did say, however, that he felt extremely welcome and accepted here (V=7).

The Training Program and Its Potential Impact:

Mr. Bisika indicated that he felt he had not participated sufficiently in planning both his training program and the results expected of him within his employing institution. He said that his employer participated in planning his training: his employer defined the entire content of his program. He went on to report that the results expected of him within his employing organization were not *explained* to him, though he did say he felt he *understood* what his employer expected of him prior to beginning the training. Mr. Bisika indicated that his employer did not take part in his home country orientation before his departure to the U.S. He said that he did not communicate with his employer or colleagues while he was away on training. He also reported that it was not explained to him how his training program relates to USAID's development goals.

Mr. Bisika rated each of the following as extremely important reasons for his taking part in this program: achieving a particular training objective (V=7); increasing general knowledge in his field (V=7); making professional contacts in the U.S. (V=7); obtaining a diploma (V=7); achieving results or making a contribution to his employing institution (V=7); and getting a new or different job (V=7).

He reported that he understands extremely well how the training will help him to contribute and be useful in carrying out the services his employer provides (V=7). He also said, however, that he does not understand at all how his training will help him contribute to the USAID development program for Malawi (V=1). Mr. Bisika reported that he works in a technical/engineering position for a parastatal organization, and he would return to the same position upon his return from training.

Mr. Bisika indicated that he intends to make changes or achieve other results within his employing institution within one year of his return from the training. He indicated that he devised his own plan for how to apply his training. He intends to improve and expand the services his employer provides. He reported that he did not have a Training Agreement that specifies the reason for and the purpose of his training.

Mr. Bisika reported that the training will play a definite role in his ability to achieve changes within his employing organization. He also reported believing that he is sufficiently prepared to achieve results. He indicated that he felt his skills and knowledge; support from his organization, colleagues, and government; having sufficient resources; and demand for his organization's services are the factors that will make the greatest contribution to enhancing the impact he has on his employer. Regarding impediments to achieving change within his organization, Mr. Bisika indicated that resource constraints, lack of cooperation from other organizations, and external constraints not under his organization's control are the main factors that may impede his efforts.

This participant indicated that the level and duration of the training program was just right for him. He reported that the elements that were included in his program were the following: lectures, seminars, special courses, large group discussions or projects, and professional contacts or networking. He reported that the training fit both his professional goals and his employing institution's goals; that there was enough time allowed to achieve training objectives; that there was enough variety in the program's activities; and that the people at the training facilities were adequately prepared. He indicated that instruments and equipment were an essential aspect of the training program, and he went on to say that most of the equipment was appropriate for application in Malawi. Mr. Bisika offered his view that the training time was divided appropriately between classroom training and training outside the classroom.

Mr. Bisika offered the following as a concept that was new and most important to him: "Demography of reproductive health will be useful at this time when governments are being called upon to integrate family planning services with reproductive health".

Mr. Bisika listed four intentions for contributions that he plans to make as a result of his training. He plans to develop a sound family planning program that will significantly raise the contraceptive prevalence rate. He intends to monitor the integration of family planning and reproductive health services to ensure that the progress already made in family planning is not compromised. He said he will develop a protocol for population and health research communication. He plans to conduct research and evaluations that have policy relevance.

Lessons Learned:

It is significant that Mr. Bisika indicated that he does not understand how his training program relates to USAID's development program for Malawi. He also reported feeling that he did not participate sufficiently in the planning of this training. It may be helpful to consider this in future planning for results.

Overall, Mr. Bisika reported extreme satisfaction with his training program (V=7), and he seems quite ready to apply his training within his employer and make a contribution based on what he learned in this program.

In summing up his assessment, he indicated that taking everything into consideration – his professional, personal, cultural, and social experiences as well as his training – he is extremely satisfied with his total experience as a USAID participant (V=7). He felt that of the two kinds of experiences he had during his stay in the U.S. – the training itself and the social, cultural, and personal experiences outside of his training – the training itself was more important to him. He indicated that he believes his overall experience as a USAID participant better prepares him to further the goals of his employing institution. He also said he would recommend the training programs to other people in Malawi with similar technical backgrounds and goals. Mr. Bisika stated the following: "In general, I think the program couldn't have been any better".

GLOBAL TRAINING FOR DEVELOPMENT
USAID/ERITREA
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 812
Effective Dates: 07/01/97 - 12/31/98
Contract Total: $169,628
Obligated Amount: $169,628

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors, The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure from July 1, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 812, with the U.S. Agency for International Development.

The report is organized as follows: Summary, Activities, Concerns/Constraints, and Recommended Actions. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

On February 5, 1997, USAID/Ethiopia's Contracts Office issued a competitive RFP for USAID/Eritrea, which was to establish a participant training center at the University of Asmara, Eritrea via the GTD mechanism. The Delivery Order RFP requested a number of services, including: need for one person in Eritrea for six months to develop a standard operating procedure to process participants; establishment of a placement office at the University of Asmara (UA) to be staffed by UA staff members and supported by a U.S. based training office for the three year life of the activity; and, training three UA and two USAID/Eritrea staff members as training specialists to be able to carry out all actions necessary for an efficient and effective USAID participant training program, from program identification to post-training follow up and assessment.

On February 21, 1997, the Contracts Office issued clarifications and an addition to the Scope of Work. Regarding the in-country, third-country, and U.S. training services being requested, it specified processing 30 participants for master's degree programs in the U.S. in the first six months, 60 additional participants for master's degree programs in the U.S., one or two in-country workshops or conferences with 30 attendees and two to three candidates for third-country training. The additional request was to monitor participants already in the U.S. who would continue their studies beyond the end date of Partners in International Education and Training (PIET) monitoring services. On February 28, 1997, World Learning submitted its proposal according to the Scope of Work and clarifications. On April 22, the Contracts Office issued a request for revised budgets based on further clarifications. World Learning submitted its response in early May.

Kristin Loken, Acting Representative at USAID/Eritrea, sent World Learning a request via fax on July 1, 1997 to handle the four academic participants formerly funded via PIO/P and managed by PIET. The message indicated, "We will proceed to execute the delivery order as soon as possible. In the meantime, please assume management of these participants beginning July 1, 1997."

On August 11, 1997, after an exchange of communications in early August regarding whether World Learning could incur expenses, Ann Hirschey, USAID/Eritrea resent World Learning the Mission fax of July 1, indicating pre-contract authorization.

Also in August, the Contracts Office requested revised budgets for the administrative and participant costs to monitor the four academic participants in the U.S. World Learning submitted the revised budgets on September 11, 1997. The Contracts Office indicated that the portion of the earlier proposal to establish a training center at the University of Asmara was still under consideration and that it would be a separate delivery order from the one signed September 23 for the four academic participants.

On August 28, the Contracts Office informed World Learning it had submitted the winning proposal for the Participant Training for Eritrea. It indicated the following, " Please be advised that at this time, Eritrea is only interested in our awarding the six month training portion of the RFP. No third-country training or in-country conferences are to be included. Your Asmara representative is to work for and in the university and conduct on the job training to one to two USAID and three University of Asmara's staff. Whether or not the remainder of the RFP will be awarded will be based upon a decision to be made by the University of Asmara and the Mission within the next four months." The message further indicated that the President of the University of Asmara would be in the U.S. in late September and that he was interested in meeting with World Learning. As the request for services was now reduced from three years to six months, a reconsideration of approach by the World Learning GTD team and a fourth round of rebudgeting was needed. World Learning submitted a budget on September 16 based on 6.5 months to establish the office and 1 month to close out reporting on the project. A signed Delivery Order is still pending.

II. ACTIVITIES

The June to September 1997 quarter represented a significant transition and start up period for GTD as a whole. It was complicated by the fact that World Learning Delivery Orders to service academic participants already in the U.S. were in pre-contract authorization status with contract negotiation still pending. After five months (February to June 1997) of correspondence, inquiries, clarifications, rebudgeting, and resubmissions, a Delivery Order for services to USAID/Eritrea was not in place by the end of June. The July 1 message from the Mission was not understood by World Learning to be a pre-contract authorization, as it was not from the Contracts Office, did not provide pre-contract period dates or ceiling amount, and did not specify authorization to incur costs. Also, at the time, services for the four academics were part of a larger Delivery Order proposal; the message preceded information from the Contracts Office that services for the four academic participants and other services would be addressed in separate delivery orders.

When the Mission clarified on August 11 its intention to provide pre-contract authorization, the World Learning team processed and sent the August monthly maintenance allowance (MMA) checks that same day via overnight delivery for the four academic participants. In late July/early August, the AAI monitoring staff fielded daily concerned inquires from the participants regarding the status of their payments. World Learning/AAI appreciate the efforts of the Mission throughout and regret the misunderstanding of the pre-contract communication.

In June, PIET had made its final MMA payments to the Eritrean participants for the month of July. However, by the end of July, the continued lack of signed GTD contracts from a number of sources impacted on the transition from PIET to GTD. From mid-August through September, World Learning/AAI set about to restore confidence among participants whose monitoring services had been affected and to set up myriad systems and forms for the new contracting mechanism and the USAID reengineering requirements.

Representatives of World Learning and AAI spoke with staff from USAID/Eritrea, including Pam Foster, when they were in Washington, DC for the July 14-18 USAID/G/HCD Conference on Human Capacity Development.

Key staff from World Learning and AAI met with Dr. Woldab, President of the University of Asmara (UA), in Washington, DC September 23. The information provided by Dr. Woldab raised a number of questions for World Learning and AAI about how and when work could proceed on the USAID-funded establishment of a training center at UA. For example, the five people he expected to be trained in the initial six month period would all be Eritreans (UA staff yet to be identified), not three UA staff and 2 USAID staff as was understood from the Scope of Work. According to Dr. Woldab and the draft job descriptions he provided, projected functions for the five would be for them to work in a Project Coordinating Unit (PCU) at UA and linked to the Human Resource Development units of all Government of Eritrea Ministries as: Training Specialist, Recruitment Specialist, Database Specialist, Monitoring and Evaluation Specialist, and Finance Specialist. World Learning and AAI realized such staff training

might be carried out more effectively by specialists with different experience and expertise than by one person with education and training background residing in Asmara for six months.

World Learning/AAI understood the Delivery Order objectives to include the set up of an USAID-style training office at UA, per reengineering principles for workplace performance results-oriented training and to establish recruitment and selection procedures to identify 30 candidates for U.S. graduate training in 1998 and up to 60 more to begin U.S. graduate degree programs in 1999. The information which emerged from this meeting suggested a broader, national-level activity of planning for the skilled labor needs of each sector and a strong UA role in determining where and how human capacity development training would be carried out: in-country at UA, in third countries, or possibly in the U.S.

PROGRAM HIGHLIGHTS:

Ms. Regbe Samuel Ghebrehiwet, B.S. Nursing, Western Michigan University, Kalamazoo, MI, August 15, 1996 - August 31, 1998

Ms. Ghebrehiwet's academic progress is fair; she is currently maintaining a 2.87 GPA. She took two 3 credit courses over the Summer: "Algebra I" and "Introduction to Social Psychology"; she received a "D" in the psychology course. She is retaking "Introduction to Social Psychology" plus two other courses, "EAC Health" and "Self Care and Introduction to Statistics", for a total of 15 credits in the Fall term. Ms. Ghebrehiwet is still scheduled to complete the B.S. degree as scheduled in August 1998.

Mr. Berhane Negusse Haregot, B.S. Nursing, Western Michigan University, Kalamazoo, MI, August 15, 1996 - August 31, 1998

Mr. Haregot is doing well in his coursework and is currently maintaining a 3.06 GPA. He took two courses over the Summer for a total of six credits: "Abnormal Psychology" and "Critical Reasoning". Mr. Haregot signed up for three courses in Fall 1997 for a total of 15 credits: "Introduction to Statistics", "EAC Health and Self Care", and "Introduction to Social Gerontology". He is slated to complete on schedule - August, 1998.

Mr. Tesfai Wahid Immam, B.S. Nursing, Western Michigan University, Kalamazoo, MI, August 15, 1996 - August 31, 1998

Mr. Immam is doing well and is currently maintaining a 3.63 GPA. He took two courses over the Summer for a total of six credits: "Abnormal Psychology" and "Critical Reasoning". For the Fall 1997 term he is signed up for three courses for a total of 15 credit hours: 'Nursing Role in Facilitating Health and Self Care", "Social Gerontology", and "Introduction to Statistics". He is on schedule to complete his degree in August 1998.

Ms. Shashu Gebreselassie Keleta, B.S. Nursing, Western Michigan University, Kalamazoo, MI, August 15, 1996 - August 31, 1998

Ms. Keleta is doing very well in her coursework and currently holds a 3.75 GPA according to her most recent AETR. She took two 3 credit courses over the Summer: "Abnormal Psychology" and "Gender, Culture and Families". She is signed up for three courses totaling 15 credit hours for Fall 1997: "EAC Health and Self Care", "Introduction to Statistics", and "Introduction to Social Gerontology". She is scheduled to complete on-time as well, in August 1998.

For information on participant training costs during this quarter, please refer to the Appendix, which lists each participant's training program, dates, current budget amount and expenses paid this period.

III. CONCERNS/CONSTRAINTS

A. ADMINISTRATIVE ISSUES

World Learning/AAI understands that the transition to the GTD contracting mechanism has been complicated for all parties involved and is aware that some factors, such as NMS, were beyond the control of the Missions or Contracting Offices. The transition was neither as smooth nor as timely as expected. World Learning and AAI made a particular commitment to ensure continued services to academic participants previously handled by PIET; both organizations have the experience and capability to provide a range of other training-related services as well. Embedded in their commitment is the organizations' long term and continued deep support to fostering the power and value of human resource development.

The World Learning team appreciates the opportunity to serve USAID/Eritrea and Government of Eritrea training needs. World Learning's GTD staff look forward to further communication from the Contracts Office which confirms that the Contracts Office, the Mission, and the host country government are all in agreement and moving forward about the terms of the funding and the objectives, as well as all parties' respective involvement, responsibilities, contributions, and areas of accountability. A clearly communicated and agreed upon vision and implementation strategy is needed in order for in-country services to proceed at the University of Asmara.

B. PARTICIPANT ISSUES

The main issues raised by the participants this quarter were concerns about the status of funding and delay in receipt of August allowances. The participants were aware that the funding for their programs through PIET was budgeted only through March 1997 due to the end of the PIET contract. From the outset, however, the Mission and Western Michigan University indicated that participants would need 24 months from the U.S. arrival date of August 1996 to complete the specially designed B.S. Nursing degree program. GTD monitoring staff advised the participants that the GTD funding would cover participant expenses through their projected degree completion in August 1998.

IV. RECOMMENDED ACTIONS

World Learning recommends that USAID involve the World Learning GTD team in any possible re-visitation or re-negotiation with the University of Asmara regarding the establishment of a training center at UA.

APPENDIX 1

GTD/ERITREA D.O. 1997 PARTICIPANTS

SO1: Increase Use of Sustainable, Integrated Primary Health Care Services by Eritreans

U.S. TRAINING

World Learning Report for the Quarter 07/01/97 - 09/30/97

Participant Name	Training Institution	Dates	Current GTD Budget	Expenses Paid 07/01 -09/30/97	Approximate Balance
1. Regbe Samuel Gebrehiwet	Western Michigan University	08/15/96-08/31/98	$ 36,293.05	$ 5,239.54	$ 31,053.51
2. Berhane Negusse Haregot	Western Michigan University	08/15/96-08/31/98	$ 36,341.05	$ 5,227.54	$ 31,113.51
3. Tesfai Wahid Immam	Western Michigan University	08/15/96-08/31/98	$ 33,631.17	$ 5,131.76	$ 28,499.41
4. Shashu Gebreselassie Keleta	Western Michigan University	08/15/96-08/31/98	$ 36,341.05	$ 5,191.86	$ 31,149.19
			$142,606.32	$20,790.70	$121,815.62
			+ $ 3,729.68		
			$146,336.00*		

* The September 11, 1997 proposal participant budget of $146,336 was fully incorporated into the ceiling price of the D.O. The participant budget of $146,336 comes to $36,584 per participant for four participants. The current GTD budget amounts for each participant are slightly less, because the budgets are periodically updated to reflect expenses actually paid. For example, though a standard amount was budgeted in the proposal budget for book allowance, expenses actually paid for Summer 1997 book allowance varied according to the book receipt amounts submitted by each participant for the courses taken. Individual participant GTD budgets will continue to be adjusted as needed to make actual line item payments. At this time, the $146,336 total authorized still appears sufficient to cover anticipated participant costs through August 1998.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/MALI
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 813
Effective Dates: 07/01/97 - 08/18/99
Contract Total: $355,000
Obligated Amount: $355,000

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors, The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* Infostructure) from July 1, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 813, with the U.S. Agency for International Development.

The report is organized as follows: Summary, Activities, Concerns/Constraints, and Recommended Actions. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

On June 18, 1997 USAID/Mali forwarded World Learning a GTD Scope of Work to assume responsibility for academic participants as of July 1, 1997 and to program 60 new, short-term participants between FY 1998 and FY 2000. According to the Scope, the academic participants were handled under contracts ending June 30, which the Mission held with Texas A&M University and Washington State University. An average of 20 participants per fiscal year were slated to attend U.S., short-term technical training of one to three months per program. The Scope also requested that the contractor assist the Mission in developing its training strategy, including contributing to needs assessments and training plans, implementing recruitment, selection, orientation and preparation processes, placing and monitoring participants in appropriate and cost-effective training opportunities, providing reports, facilitating re-entry and follow-on activities, as well as monitoring performance.

The World Learning GTD team sought clarification on the number of academic transfers and learned from the Mission that there would be a total of 11 academic participants. Nine participants in the U.S. under the Mali SPARC contract would be transferred from Michigan State University, the subcontractor to Texas A&M, effective July 1, 1997; one participant in the U.S. would be transferred from the Washington State University contract effective January 1, 1998; and one new, already placed participant would arrive in the U.S. from Mali in late June 1997 to begin an academic program.

On July 14, 1997, following an exchange of communication beginning in late June, World Learning sent USAID/Mali budgets with a request for pre-contract authorization. The pre-contract authorization was needed to cover administrative costs July 1 through August 15 plus participant costs July and August. The responsibility for 10 of the academic cases was turned over to World Learning on July 1, but a Delivery Order was not yet in place.

Two weeks later, on July 28, 1997, World Learning submitted a full proposal to USAID/Mali. After intensive follow-up with USAID, REDSO/WCA issued a pre-contract authorization on August 18, 1997. Per REDSO request, World Learning resubmitted its cost proposal on September 23, 1997. On September 30, the 25.5-month Delivery Order, retroactively effective to July 1, 1997 through August 18, 1999, was issued and signed.

II. ACTIVITIES

Initial GTD activities centered around:

- ⇒ Preparing a response to the USAID/Mali GTD Scope,
- ⇒ Collecting information to draft budgets for the Malian academics,
- ⇒ Monitoring academic participants transferred on June 30,
- ⇒ Establishing staff at the World Learning GTD office,
- ⇒ Obtaining a pre-contract authorization to make essential payments for academic participants, and
- ⇒ Negotiating the Delivery Order.

In the final week of June 1997, Michigan State University (MSU) shipped files to World Learning/AAI. GTD programming staff immediately attempted to extract the relevant information to draft GTD participant budgets. Staff contacted MSU, the participants, and key officials at all the universities where the transferred participants were studying in order to gather a plethora of monitoring and budgeting details. The files shipped by MSU included not only the nine participants who would remain in the U.S. after June 30 (and would be monitored under GTD), but also included files of participants who completed U.S. training by June 30 under the SPARC contract and incurred costs in calendar year 1997. Without being asked to do so, MSU shipped the additional files, realizing that 1997 taxes for completed participants would need to be paid in 1998 and assuming the new contractor would become responsible for doing so. As the GTD Scope did not include this tax responsibility and World Learning/AAI was not asked by the Mission to budget for it, despite World Learning/AAI efforts to seek clarification on this point, no funds for either the administrative or participant costs of filing these taxes were included in the GTD proposal/budgets or in the Delivery Order funding.

GTD staff also contacted Washington State University (WSU) for budget and academic status information on the one participant to be transferred to GTD on January 1, 1998. WSU declined to provide the information, as it indicated it had not been officially informed to do so by the Mission. World Learning/AAI brought this to the attention of the Mission Training Officer, but was unable to include costs for this participant in the proposal submitted, because the needed information was not made available.

GTD programming staff contacted Johns Hopkins University (JHU), where the Mission's new academic participant was enrolled in an 11 month Master of Public Health (MPH) program, to gather budget and program information. This participant arrived with some advance maintenance funds from the Mission. Michigan State University provided July monthly maintenance allowance (MMA) and return tickets for SPARC participants departing the U.S. in July and August. However, none of the participants had maintenance funds beyond July, and by the end of July World Learning had neither a signed Delivery Order nor pre-authorization to expend any funds. This set the stage for dramatic and serious participant scenarios that resulted from their lack of timely receipt of August funds.

For three weeks, from late July through mid-August, GTD programming staff fielded dozens of calls each day from participants, academic advisors, foreign student advisors, and other university staff, inquiring about the status of maintenance and other payments. Malian participants experienced the anxiety of not knowing whether funds and air tickets would arrive in time to meet a variety of commitments. Commitments included: rent and utilities payments; August conference attendance; and, for those completing their programs in August, necessity to settle their U.S. affairs and depart as ticketed with their dependents. At least one student had to take out an emergency loan through the university; others had late fees to pay. On August 18, the day the pre-contract authorization was signed, World Learning/AAI mailed maintenance checks via overnight courier delivery. Mid-August through September, World Learning/AAI took actions to restore confidence among participants whose monitoring services had been affected and to establish systems and forms for the new contracting mechanism and the USAID reengineering requirements. Through September 30, vendor payments, including tuition, were held awaiting a fully signed Delivery Order, as the limited pre-contract authorization did not provide enough funds to both release vendor payments and to meet immediate participant payment needs.

PROGRAM HIGHLIGHTS:

Mr. Youssouf Cisse, M.S. Agricultural Economics, Michigan State University, Lansing, MI, May, 1993 - June 1997, Certificate in Computer Information Systems, Lansing Community College, Lansing, MI, July 1997 - August 1998

Mr. Youssouf Cisse is doing well in his program and is scheduled to complete the certificate courses in July 1998. Mr. Cisse took three courses over this past Summer: "Computer Information Systems", "Introduction to the Internet", and "Lab Section for Computer Information Systems". He achieved a 3.7 GPA. He also submitted a draft of his master's thesis. Mr. Cisse's academic advisor, Dr. John Staatz, is reviewing the thesis. Mr. Cisse is taking three courses in the Fall of 1997: "Business Information Systems: A Problem Solving Approach"; "Programming with Microsoft Visual Basic 4.0"; and "Internet 1997 Unleashed".

Mr. Mohammed Diarra, M.S. Food Science, Washington State University, Pullman, WA, December 1993 - August 1997

Mr. Diarra successfully completed the requirements for his master's degree and, to World Learning/AAI's knowledge, has returned home to Mali.

Mr. Mamaourou Diourte, Ph.D. Plant Pathology, Kansas State University, Manhattan, KS, May 1993 - August 1997

Mr. Diourte successfully completed the requirements for his Ph.D. and, to World Learning/AAI's knowledge, has returned home to Mali.

Mr. Bocary Kaya, Ph.D. Agroforestery, University of Florida, Gainesville, FL, April 1995 - April 1999

Mr. Kaya is currently conducting research for his dissertation in Mali. Mr. Kaya returned to the U.S. September 6th for the birth of his daughter and returned to Mali to continue his research on October 11th. World Learning/AAI was in touch with him during his stay in the U.S. It is World Learning/AAI's understanding that the Government of Mali furnished Mr. Kaya's return international ticket for the September - October trip. Mr. Kaya plans to remain in Mali until December 1997, at which time he will return to the University of Florida and register for classes for the Spring 1998 semester.

Mr. Kaya's dissertation research plan includes another trip to Mali in Summer 1998 through December 1998. World Learning/AAI will keep the Mission updated on Mr. Kaya's progress. He is currently scheduled to for April 1999 completion; however, World Learning/AAI was unable to obtain a Summer or Fall 1997 AETR from Mr. Kaya, as he was out of the country during this period. World Learning/AAI will request that he complete AETRs for these two terms, indicating his anticipated completion date and his 2 credit dissertation research in Mali. When these are returned, they will be sent via pouch to USAID/Bamako.

Mr. Hamidou Nantoume, Ph.D., Range Management, Texas A&M University, Uvalde, TX, April 1995 - April 1999

Mr. Nantoume is currently conducting research for his Ph.D. in Uvalde, Texas. He is on target to complete as scheduled in Spring 1999. World Learning/AAI received a letter on September 11 from Mr. Nantoume's academic advisor, Dr. TDA Forbes. Dr. Forbes wrote to request clarification of the terms of funding for Mr. Nantoume's program. Dr. Forbes indicated that Mr. Nantoume was originally placed at Texas A&M by Michigan State University under the SPARC project. Dr. Forbes indicated that it was his understanding that there would be at least $3,500 in funds available for Mr. Nantoume's research project. In his letter, Dr. Forbes outlined the proposed research costs for Mr. Nantoume's dissertation and requested that the new contractor release these funds. World Learning/AAI informed Dr. Forbes and Mr. Nantoume that World Learning/AAI was not made aware by the former contractor during the proposal process that additional funds would be needed for his research. Thus World Learning/AAI budgeted only the standard AID dissertation allowance of $2,000. World Learning/AAI will send USAID/Bamako the information from Dr. Forbes' letter including the budget, justification, and dissertation proposal for Mission consideration and response.

Ms. Tsigue Pleah, MPH, John's Hopkins University, Baltimore, MD, June 1997 - June 1998

Ms. Pleah arrived directly in Baltimore, her training site, in time for the July MPH program start date. She came to Washington, DC for an administrative briefing and orientation with AAI program staff in September 1997. During this briefing, Ms. Pleah indicated that the program was going well and that she had taken seven courses for 20 credits over the Summer Quarter, July - August 1997: "Introduction to Biostatistics", "Computer Applications to Public Health", "Health Information Systems", "Internet Resources for Public Health Research", "History of Public Health", "Problem Solving and Public Health", and "SP Topics: MPH Goal Analysis". Ms. Pleah signed up for five courses, 18 credits, for the Fall Quarter, September - October 1997: "Basic Biostatistical-Inference", "Introduction to International Health", "Quality Assurance Management Methods", "Issues in Health Communication", and "Principles of Epidemiology".

Ms. Pleah indicated that the course work was very intensive. She is on target to complete her degree in June 1998. During her administrative briefing, Ms. Pleah indicated that, due to the intensive nature of her program and due to the heavy curriculum emphasis on computers and statistics, she would need a computer to succeed in her program. World Learning/AAI asked her to furnish the necessary documentation - costs estimates, a letter from her academic advisor, and a written request from her. Ms. Pleah indicated that she would provide this documentation right away. Her hope is to have the computer in time for the Winter session, November - December 1997.

Mr. Amadou Sidibe, M.S. Seed Technology, Mississippi State University, Mississippi State, MS, January 1995 - January 1998

Mr. Sidibe attended a conference this quarter, the Symposium on Seed Biology and Technology, in Fort Collins, CO, August 13 - 15, 1997. He has also requested to attend the American Society of Agronomy Annual Meeting in Annaheim, CA, October 26 - 31, 1997.

Mr. Sidibe signed up for six credits of thesis research over the Summer and is currently enrolled in a one credit "Seminar" and a "Plant Metabolism" course Fall 1997. He is also completing his master's degree thesis and will complete the requirements for his degree and return home in December. World Learning/AAI will work with Mr. Sidibe to finalize his return travel arrangements.

Mr. Samba Traore, Ph.D. Agronomy, University of Nebraska, Lincoln, NE, April 1995 - April 1999

Mr. Traore is doing well in his academic work and is on track to complete the requirements for his Ph.D. by March 1999. This past Summer, he worked on his doctoral dissertation and signed up for 3 dissertation research credits. For the Fall semester, Mr. Traore is signed up to take: "Herbicide Chemistry and Mode of Action", "Research Strategies in Agriculture", "Multiple Regression", and another 3 dissertation research credits.

Mr. Seydou Traore, Ph.D., Agroclimatology Iowa State University Ames, IA, January 1995 - January 1999

Mr. Traore is doing well in his coursework and currently expects to complete the requirements for his doctoral dissertation by December 1998. He took one 6 credit course over the Summer, "Research in Agricultural Meterology". Mr. Traore signed up for four courses for Fall 1997: "Geographic Information Systems", "Agricultural Meteorology", "Crop Physiology Seminar", and "Agricultural Meteorology Research". He is maintaining a 3.79 GPA.

Mr. Traore has inquired about the "spouse training" component of the SPARC project and wanted to know if spouse training was a component of the GTD contract. World Learning/AAI explained to Mr. Traore that this was not part of the GTD contract with USAID/Bamako.

For additional information, please refer to Appendix 1 and 2 which list each participant's field of training, program dates and budget and expense data.

III. CONCERNS/CONSTRAINTS

A. ADMINISTRATIVE ISSUES

The GTD team found that the time between receiving the Scope and the date academic monitoring was to begin (nine workdays) to be insufficient to put a Delivery Order in place and found it extremely problematic to effectively provide monitoring services without access to funds. The eight-week process of putting a pre-contract authorization in place placed unnecessary burdens on the participants, whose funding was intended to continue uninterrupted.

As indicated in Section II, World Learning was unable to submit a participant budget for Kolado Bocoum, as his cost and academic status information was not available from the present contractor. Thus, the signed Delivery Order does not include funds to cover the costs of his training, though World Learning is requested to begin monitoring on January 1, 1998.

B. PARTICIPANT ISSUES

The participants raised numerous questions about their funds and about whether the Mission would approve expenses not specifically included in World Learning's cost proposal to USAID. The inquires included requests to fund exceptional dissertation research costs, purchase computers, and fund U.S. studies for spouses. World Learning/AAI will gather cost estimates for the research and computer requests, and forward the information to the Mission, along with a cost estimate for Kolado Bocoum's program.

Participants indicated that funds for spouses to study had been available under the Mali SPARC contract. World Learning/AAI advised them that this information was not provided by either Michigan State or the Mission during the proposal process. Thus the GTD participant budgets did not include funds for some exceptional requests, such as for dissertation costs that would exceed the standard USAID allowance. GTD participant budgets were submitted based on standard USAID allowances. This has resulted in some confusion for the participants. Effectively, the transition from the SPARC project to GTD changed the terms of the participants' sponsorship.

One new student arrived in the U.S. for her program when World Learning did not have a signed GTD Delivery Order with USAID/Mali. The period when an academic participant first arrives in the U.S. is generally an intensive monitoring time to get things started off well. For Ms. Pleah, the initial couple of months in the U.S. were particularly challenging. The primary issue was that World Learning/AAI could not provide her with settling-in funds or monthly maintenance until there was a signed Delivery Order or pre-contract authorization. The delay added stress to this new participant's adjustment to the U.S.

In addition, the degree program in which she is enrolled requires not only extensive computer access, but use of sophisticated statistical software, which makes her lack of a personal computer from the beginning a significant disadvantage. Had the GTD Delivery Order been in place in time to provide placement services, World Learning/AAI would have sent the Mission a full description of the program in the Training Implementation Plan, including information about the computer-oriented, quantitative nature of this intensive, 11 month program. The issue of funding for a computer could have been addressed prior to participant's arrival in the U.S.

IV. RECOMMENDED ACTIONS

The World Learning team makes the following recommendations:

- That the Mission clarify whether elevated allowances for dissertation research will be authorized, whether it intends to continue funds for "spouse training", and whether it will agree to fund the leasing or purchase of computers for participants. If the Mission will authorize any of these additional costs, World Learning/AAI requests confirmation that funds will be added to the Delivery Order. As the Delivery Order is now only partially funded (fully funded administrative costs through August 18, 1999, but only partially funded participant costs), there are insufficient participant funds to make exceptional, approved payments for participant costs unless Mission/REDSO adds funds. Additional funds will be needed no later than May 1998.

- That the Mission and USAID/G/HCD come to an agreement (and communicate to World Learning and former Mission training contractors) about who will be responsible for filing taxes for the Mali SPARC participants who had calendar year 1997 expenses, but who completed training under the Texas A&M/Michigan State University contract before the start of GTD. Additional funds will be required to cover the administrative and participant costs of preparing and filing taxes.

- That the Mission promptly review and approve the proposed budget for participant Kolado Bocoum. Approved funds for Mr. Bocoum's program will need to be provided via a Delivery Order amendment.

SUMMARY: Status of nominations as of 09/30/97

	07/01/97-09/30/97
Pick-ups from other contractor	9
Pending from past quarters	0
N - Nominated this quarter	1
A - Active, in training this quarter	7
C - Completed this quarter	3
X - Canceled this quarter	0
T - Terminated this quarter	0
P - Pending at end of quarter	0

GLOBAL TRAINING FOR DEVELOPMENT
USAID/AFR/SD/PSGE/PARTS
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 04
Effective Dates: 7/18/97 - 12/31/97
Contract Total: $100,505
Obligated Amount: $100,505

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors, The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure from July 1, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 04, with the U.S. Agency for International Development.

The report is organized as follows: Summary, Activities, Concerns/Constraints, and Recommended Actions. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

In July 1997, USAID/AFR/SD/PSGE issued this Delivery Order for services in placing, monitoring and reporting on 12 participants annually for two years. Participants attend tailored U.S. short-term training programs, each estimated to be two to six months in duration, followed by enrollment in a U.S. professional association. Developing descriptive materials to promote the program was also requested, on an as-needed basis. When the PSGE office confirmed its funding limitations, the World Learning team responded with a proposal to initially train 8 participants between July and December 1997 (with an average duration of 5.5 weeks per program). The proposal was accepted for the amount obligated above.

The objective of the training is to assist USAID/AFR/SD/PSGE to achieve its goals under the PARTS Project, which are to increase the use and influence of information and analysis for agricultural and natural resources policies and programs in sub-Saharan Africa. Each year, one or more fellowships are intended to be offered in each of the following five areas: agricultural marketing and private sector development, food security and productivity, technology development and transfer, and natural resources management and environment. Technical advisors for each of these areas in the PSGE office review participant applications, make selection decisions, and identify potential program sites based on ongoing collaborative relationships with institutions which further the office's analytical and research agenda.

Specifically, training is to contribute to these three purposes:

1. To ensure African participation, observation, and hands-on training on issues being conducted by U.S.-based organizations that are similar to what the Fellows are working on;

2. To provide fellowship holders with opportunities for professional growth; and,

3. To foster and maintain links among U.S. and African scientists and decision makers in order to address development issues.

II. ACTIVITIES

This first quarter was characterized by transition from Partners in International Education and Training (PIET) to GTD and a significant start up period for World Learning GTD Delivery Orders as a whole, with 9 GTD Delivery Orders for Africa alone serviced during the quarter. The pending PARTS participants were selected during the PIET contract, and PIET staff of The African-American Institute moved to the World Learning GTD office to continue services under the GTD contract. Thus, PARTS placement efforts were already underway before this Delivery Order began. In fact, one participant was due to arrive over the July 4 weekend to begin training. (His program is highlighted below.)

In addition, Debra Egan, the Delivery Order Manager, and Randall Blandin, the Monitoring and Support Specialist, participated in a productive PSGE office staff meeting on September 4, 1997. They reviewed the status of nominations and reinforced the need for technical advisors to proceed promptly with program identification in order to have 8 participants complete training during the six month period funded in 1997. As the pace of receiving programming information and dates from PSGE was seen as a potential issue, it was recognized that alternatively, additional funds would need to be added to the Delivery Order to cover administrative costs, should the programming of the first 8 participants continue into 1998. It was also understood from this meeting that, when FY 98 funds became available, PSGE intended to put them into this Delivery Order to program additional pending participants.

PROGRAM HIGHLIGHTS:

<u>Integrated Pest Management (IPM)</u>

Mr. Sina W.S. Luchen, Integrated Pest Management, Michigan State University, East Lansing, MI; Virginia Polytechnic Institute, Blacksburg, VA; Rodale Center, Kutztown, PA and Washington, DC, July 11 - August 7, 1997

Mr. Luchen is an Agricultural Research Officer with the Zambian Ministry of Agriculture, Food and Fisheries. He serves as national co-chairman of "Peace Quest", Zambia's technical committee on the environment, and he is chairman of the University of Zambia Branch. His Technical Advisor at AID/AFR/SD/PSGE was Dr. Walter Knausenberger.

The annual Integrated Pest Management course at Michigan State University was conducted July 6-25, 1997. However, as neither the Delivery Order nor a pre-contract authorization were signed by the end of June, Mr. Luchen's arrival was delayed a week. As soon as funds were made available, his air ticket was rebooked. Given flight schedules and the fact that the participant worked several hours outside the capital of Zambia, he didn't arrive in Michigan until July 11. World Learning/AAI kept the course director informed throughout, and he graciously offered for

Mr. Luchen to remain on the campus an additional week after the conclusion of the course. Mr. Luchen was able to make up material he missed during the first week at no additional tuition cost. The IPM course was designed to provide a mix of traditional and experiential learning to address the design, implementation, and evaluation of IPM programs. It provided hands-on experience in integrated management of insects, diseases and weeds in field crop, as well as vegetable and fruit crop ecosystems. Participants visited several IPM field research and demonstration sites in the state.

From Michigan, Mr. Luchen traveled to Virginia Tech for further training coordinated by Dr. Brhane Gebrekidan. He then proceeded to the Rodale Center in Kutztown, PA, where he focused on composting, organic farming methods, natural pest control, regenerative farming techniques, and natural resource management techniques he could use upon return to Zambia.

As a result of his training Mr. Luchen indicated that he intended to disseminate information on integrated pest management techniques, organize a participatory national or regional agricultural workshop, work to identify local and regional collaborators, and set up a network for regenerative agriculture. Overall, he commented that the training was "very useful", though he indicated that he would have benefited from a longer program.

Mr. Luchen maintained a very positive outlook despite the initial logistical challenges. He also commented that he found the program somewhat fluid. In his original understanding, the program was to include components at Ohio State University and site visits to two other countries in Africa as well. The COTR and Technical Advisor in the PSGE review each Training Implementation Plan (TIP) describing the program and the draft budget before it is sent to the Mission. During the review process, the COTR recognized that the full cost of the proposed program, including training in the U.S. and in Africa, would significantly exceed the average amount available of $11,614/program for 8 programs. At the PSGE office request, the program was shortened and the budget was reduced accordingly. Mr. Luchen commented he would have benefited from a more clearly defined schedule set well in advance of his departure from Zambia.

For additional information on training during these this quarter, please refer to the Appendix, which lists the participant's training program, dates, duration and estimated cost.

III. CONCERNS/CONSTRAINTS

A. ADMINISTRATIVE ISSUES

Lack of a finalized and fully signed Delivery Order by June 1997 precluded efforts made under PIET for a seamless transition. As the Delivery Order was not yet in place and since a fully placed participant was due to arrive in the U.S. the first week of July, World Learning requested a pre-contract authorization to cover the initial participant costs. Timing of the official authorization resulted in both an unnecessary participant delay of nearly two weeks until funds were made available and an increase in the administrative efforts necessary to redo work, including repurchasing airline tickets and rearranging logistics.

Despite PIET and GTD readiness to move forward with placement details and ongoing communications between World Learning/AAI and PSGE to request program contacts, training objectives, and proposed dates, only 1 participant was trained this quarter. At this point, it is very unlikely that 7 participants will be trained by December 1997, since training programs and

dates remain to be confirmed by technical advisors before World Learning/AAI can complete Training Implementation Plans (TIPs) with full logistics.

B. PARTICIPANT STATUS

As of September 30, 1997, there are 7 previously selected participants pending under the initially budgeted and funded period of the GTD Delivery Order. Other participants were also selected in 1996 and 1997, and are either deferred by PSGE or to be programmed with FY 98 funds when they become available as indicated below:

PARTICIPANTS SELECTED IN 1996, DEFERRED TO 1997 GTD

Participant	*PSGE Unit*	*Status*
Esther Soi	TDT	Technology Transfer, Agricultural Marketing 11/2-12/6/97
Mary Ngugi	TDT	same program as Ms. Soi above
John Lubuva	NRM	Environmental Impact Assessment, dates unknown
Michael Odhiambo	ENRM	World Resources Institute, 2/98 (tentative)
Faustine Makango	FSP	awaiting program identification
*Drammane Mariko	FSP	Michigan State U., 1-5/98
Mogamet Bagus	PSD	Executive Management, dates unknown

*Note, Mr. Mariko replaces a previously selected candidate, Charles Owach

PARTICIPANTS SELECTED IN 1996 BUT DEFERRED INDEFINITELY

Participant	*PSGE Unit*	*Status*
Anafrida Bwegne	PSD	deferred
Albano Leite	PSD	deferred

PARTICIPANTS SELECTED IN 1997, TO BE PROGRAMMED VIA GTD IN 1998 WITH NEW FUNDS

Participant	*PSGE Unit*	*Status*
Henri Lo	ENRM	Finalist
Worku Getachew	ENRM	Alternate
Messele Fisseha	TDT/ENRM	2nd Alternate
Joseph Oryokot	TDT	Alternate
Tesfay Zegeye	TDT	2nd Alternate
no finalist	PSD/TDT	priority given to Mr. Bagus above
Abebe Haile-Meski	PSD	1st Alternate
Benti Bugul	PSD	2nd Alternate

IV. RECOMMENDED ACTIONS

The World Learning team makes the following recommendations:

- The GTD team appreciates the initiative that PSGE is taking to secure additional funding for administrative costs beyond December 1997, as indicated by the COTR in the September 4 meeting. It is important that contracting actions to add funds are completed in a timely manner, so that programming of the initial 8 participants can continue uninterrupted in calendar year 1998 and programs are not affected adversely.

- World Learning/AAI appreciates that PSGE includes GTD programming staff in the substantive participant debriefing and reporting sessions. GTD staff plan to continue to attend. We will continue to provide an administrative briefing and debriefing in our office as well.

- World Learning/AAI look forward to the opportunity to continue working with PSGE on PARTS participant programming, not only for the 7 remaining pending candidates of the initial 8, but also for the additional 7 selected in 1997, listed above for programming in 1998, and for those who will be chosen from new 1998 applications. We request earliest communication when FY98 funds become available, so that a cost proposal and contract actions can move forward.

GTD/AFR/SD/PSGE PARTS D.O. 1997 NOMINATIONS
U.S. TRAINING
World Learning Status Report for the Quarter July 1 - September 30, 1997

Participant Name	Course/ Training Institution	Dates	Months**	Estimated Budget
1. Sina Luchen	Integrated Pest Management/ Michigan State U.	07/11/97-8/19/97	1.33	$11,815.50

SUMMARY: Status of PARTS nominations as of September 30, 1997

Number of Participants

- 8 Nominated
- 1 canceled
- 1 trained
- 0 in training
- 7 pending

Estimated Costs

- $11,815.50 -- Estimated total participant costs for completed programs (subject to final payments and reconciliation)
- $11,614 -- Estimated average participant cost per program per GTD proposal for first 8 programs

Total Training Months

- 1.33 -- Training months total
- 1.33 -- Average length of each completed training program

KEY

* Program canceled
** "Month" is 30 calendar days

GLOBAL TRAINING FOR DEVELOPMENT
USAID/REDSO/ESA/NAIROBI
QUARTERLY REPORT
MAY 21 - JUNE 30, 1997

Delivery Order No.: 805
Effective Dates: 05/21/97 - 08/31/98
Contract Total: $231,024
Obligated Amount: $231,024

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors (The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure) from July 1, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 811, with the U.S. Agency for International Development.

The report is organized as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions**. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

In May 1997, REDSO/ESA signed this delivery order to continue monitoring services for seven academic participants from Burundi who began their U.S. training under the Partners for International Education and Training (PIET) contract. The Scope of Work was written for nine participants, but two completed the program during the PIET-funded period. Thus, funds for only seven participants were included in the GTD Delivery Order, per the proposal and budgets submitted by World Learning. Due to the closing of the USAID/Burundi Mission effective March 24, 1997, all residual program matters, including the Mission-funded participants in the midst of their U.S. academic studies, became the responsibility of REDSO/ESA/Nairobi.

Participant selection and academic program placement preceded the USAID reengineering organizational structure of Mission Strategic Objectives (SOs), Intermediate Results (IRs) and training activities to support achievement of IRs. At the time of their nomination, USAID/Burundi specifically requested placement at Historically Black Colleges and Universities (HBCUs) for the undergraduate participants. The one graduate participant was self-placed in a program which offered a tuition scholarship with admission. The GTD Delivery Order requested management, monitoring and reporting services, particularly to verify each participants' status, estimated completion date and associated costs to complete the program of studies. This

verification of status was completed in the proposal budgeting process, and status checks are an ongoing part of monitoring.

II. ACTIVITIES

The half quarter covered in this report marked a period of significant transition and start up for GTD as a whole. In May and June, GTD monitoring services were physically provided from the former PIET office. Monitoring services are ongoing for the following seven participants:

Ms. Charlotte Kabunyoma
Ms. Alice Kakana
Ms. Fausta Ngendanimana
Ms. Laetitia Nikuse
Ms. Fides Nkunzimana
Ms. Regine Reguma
Mr. Epimanque Ntirushwubwenge

The six female, undergraduate participants were part of the PIET caseload of Program Officer, Ms. Sofia Tangalos. Former PIET and current GTD Monitoring Specialist, Mr. Randy Blandin, is assuming responsibility for all the African GTD participants of World Learning. He has monitored the program of the one male graduate participant from his arrival during the PIET contract to the present.

PROGRAM HIGHLIGHTS:

B.S. Marketing

Charlotte Kabunyoma, English Language Training (ELT), University of Nebraska, Omaha, followed by B.S. Marketing, Tuskegee University, Tuskegee, AL, April 17, 1994 - May 31, 1998

Summary: Ms. Kabunyoma is doing well in her program and is currently scheduled to complete her degree in May 1998. For the Summer semester, Ms. Kabunyoma is taking three courses: "The Black Aesthetic"; "Introductory Calculus"; and "Human Development". These courses fulfill either a general university requirement for the undergraduate degree, a university School of Business requirement, or a business elective for graduation.

B.S. Business Accounting

Alice Kakana, English Language Training (ELT), University of Nebraska, Omaha followed by B.S. Business Accounting, Tuskegee University, Tuskegee, AL, April 17, 1994 - May 31, 1998

Summary: Ms. Kakana is doing well in her program and also anticipates completing her program in May 1998. Ms. Kakana is taking one course entitled "The Black Aesthetic" in the Summer 1997 semester. Her course selections also meet general university or School of Business requirements and elective hours needed for graduation.

B. S. Business Administration

Fausta Ngendanimana, English Language Training (ELT), University of Nebraska, Omaha followed by B.S. Business Administration, Tuskegee University, Tuskegee, AL, April 17, 1997 - December 31, 1997

Summary: Ms. Ngendanimana has done extremely well in her course work and currently holds a 3.83 GPA. She took one course over the Summer entitled "The Black Aesthetic". With this course and the combination of others she took during past terms, Ms. Ngendanimana is preparing to complete her degree in December 1997.

B.S. Business Administration

Fides Nkunzimana, English Language Training (ELT), University of Nebraska, Omaha followed by B.S. Business Administration, Jackson State University, Jackson, MS, June 5, 1994 - December 31,1997

Summary: The Spring 1997 AETR indicated an estimated completion date of May 1998. PIET and World Learning/AAI contacted the academic advisor and the International Programs Office to make clear again that the participant is expected to complete all coursework for the degree no later than December 1997.

B.S. Business Administration

Regine Reguma, English Language Training (ELT), University of Nebraska, Omaha followed by B.S. Business Administration, Tuskegee University, Tuskegee, AL, September 6, 1994 - December 31, 1997

Summary: Ms. Reguma continues to perform well in her program and is still scheduled to complete her degree in December 1997. As was the case for Ms. Nkunzimana, the Spring 1997 AETR for Ms. Reguma also indicated an estimated completion date of May, 1998. Ms. Reguma is enrolled in two courses, "Human Resource Management" and "Money and Banking" for the Summer.

For additional information on training during this quarter, please refer to Attachment 1. It lists each participant's name, training program, dates, estimated budget, actual expenses paid during the quarters covered in this report and balance of budget funds.

III. CONCERNS/CONSTRAINTS

A. ADMINISTRATIVE ISSUES

Based on expenses incurred and anticipated costs through each participant's projected completion date, more than sufficient funds were requested in the proposal budgets to cover participant direct costs. The full amount of funds requested in the proposed participant budgets ($207,010) was included in the other direct costs of the delivery order. However, some costs anticipated at the time the proposed participant budgets were prepared will not be incurred under GTD either because they were paid by PIET, actual costs are lower than expected, or participants will not attend some supplementary activities that were budgeted.

For example, during the time between when the cost proposal was submitted and when the Delivery Order was signed, PIET continued to make payments, including May monthly maintenance allowance (MMA), some summer tuition and the Health and Accident Coverage (HAC) payment through June 30. The only participant cost paid with GTD funds in the quarter ending June 30, 1997 was the June MMA payment However, a number of adjustments need to be made to the administrative budget, specifically the workdays ordered. This Delivery Order does not incorporate the annual multiplier and cost of living (COLA) increases set forth under the terms and conditions of the prime contract, Part 1, Section B.3(a)(1), as amended via Modification No. 1. To correct this oversight and to incorporate other needed adjustments, the World Learning/AAI team will prepare a revised budget for USAID/REDSO/ESA review. Level of effort (LOE) for the Delivery Order Manager and other positions will be revised, and a change in the effective dates of the Delivery Order will be requested to allow for cost effective but complete close out, including the filing of 1998 income taxes in 1999.

B. PARTICIPANT ISSUES

It is expected that the primary issue for the first quarter of FY 98 will be the exit monitoring and departure preparations for three participants who are scheduled to complete their degrees in December 1997:

Ms. Fausta Ngendanimana
Ms. Laetitia Nikuse
Ms. Regine Reguma

These three participants have been in the U.S. for over three years. They have expressed reluctance and concerns about returning, given the changed political situation and the violence in Burundi since their departure. The remaining four participants are scheduled to complete their degrees and return home at the end of May 1988.

IV. RECOMMENDED ACTIONS

The World Learning team makes the following recommendations:

- That unexpended participant funds be made available to cover adjustments in the administrative budget.

- That REDSO/ESA provide World Learning/AAI with information locally available regarding the current situation in Burundi and risks for returning U.S.-trained Burundians. Specifically, any updated information the CO, COTR or designate can provide regarding the safety, estimated cost and suggested method of traveling; i.e. by land from Kigali to Bujumbura, by air from Nairobi to Bujumbura or alternate suggested routes would be appreciated, as ticketing on commercial flights is still not available from the U.S. all the way to Bujumbura. World Learning/AAI are aware participant Epimanque Ntirushwubwenge successfully traveled by road between Kigali and Bujumbura in May and August, 1997.

ATTACHMENT 1

GTD/REDSO/ESA for BURUNDI D.O. 1997 PARTICIPANTS
U.S. TRAINING
World Learning Team Report for the Quarter 05/16/97 - 6/30/97

Participant Name	Training Institution	Dates	Current Budget	Expenses Paid	Balance
1. Charlotte Kabunyoma	University of Nebraska, Omaha Tuskegee University	04/17/94 - 08/17/94 08/18/94 - 05/31/98	$35,146.30	$815.00	$34,331.30
2. Alice Kakana	University of Nebraska, Omaha Tuskegee University	04/17/94 - 08/17/94 08/18/94 - 05/31/98	$33,338.93	$815.00	$32,523.93
3. Fausta Ngendanimana	University of Nebraska, Omaha Tuskegee University	04/17/94 - 08/17/94 08/18/94 - 12/31/97	$17,226.92	$815.00	$16,411.92
4. Laetitia Nikuze	University of Nebraska, Omaha Tuskegee University	04/17/94 - 08/20/94 08/21/94 - 05/31/98	$32,873.70	$815.00	$32,058.70
5. Fides Nkunzimana	University of Nebraska, Omaha Jackson State University	06/05/94 - 01/04/95 01/05/95 - 12/31/97	$15,697.01	$857.00	$14,840.01
6. Regine Reguma	University of Nebraska, Omaha Jackson State University	09/06/94 - 01/04/95 01/05/95 - 12/31/97	$14,916.00	$857.00	$14,059.00
7. E. Ntirushwubwenge	Duquesne University	12/25/95 - 05/31/98	$28,453.45	$3,324.00	$25,129.45

ATTACHMENT 1

GTD/REDSO/ESA for BURUNDI D.O. PARTICIPANT BUDGET SUMMARY

Participant Name	GTD Proposal Budget	Current Budget	Budget Difference
1. Charlotte Kabunyoma	$ 36,275	$ 35,147	-$ 1,128
2. Alice Kakana	$ 35,020	$ 33,339	-$ 1,681
3. Fausta Ngendanimana	$ 24,390	$ 17,227	-$ 7,163
4. Laetitia Nikuze	$ 35,020	$ 32,874	-$ 2,146
5. Fides Nkunzimana	$ 24,689	$ 15,697	-$ 8,992
6. Regine Reguma	$ 22,209	$ 14,916	-$ 7,293
7. E. Ntirushwubwenge	$ 29,407	$ 28,454	-$ 953
	$207,010	$177,654	-$29,356

GLOBAL TRAINING FOR DEVELOPMENT
USAID/REDSO/ESA/NAIROBI
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 805
Effective Dates: 05/21/97 - 08/31/98
Contract Total: $231,024
Obligated Amount: $231,024

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors, The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* Infostructure from July 1, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 805 with the U.S. Agency for International Development.

The report is organized as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions**. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

In May 1997, REDSO/ESA signed this Delivery Order to continue monitoring services for seven academic participants from Burundi who began their U.S. training under the Partners for International Education and Training (PIET) contract. The Scope of Work was written for nine participants, but two completed the program during the PIET-funded period. Thus, funds for only seven participants were included in the GTD Delivery Order, per the proposal and budgets submitted by World Learning. Due to the closing of the USAID/Burundi Mission effective March 24, 1997, all residual program matters, including the Mission-funded participants in the midst of their U.S. academic studies, became the responsibility of REDSO/ESA/Nairobi.

Participant selection and academic program placement preceded the USAID reengineering organizational structure of Mission Strategic Objectives (SOs), Intermediate Results (IRs) and training activities to support achievement of IRs. At the time of their nomination, USAID/Burundi specifically requested placement at Historically Black Colleges and Universities (HBCUs) for the undergraduate participants. The one graduate participant was self-placed in a program which offered a tuition scholarship with admission. The GTD Delivery Order requested

management, monitoring and reporting services, particularly to verify each participants' status, estimated completion date and associated costs to complete the program of studies. This verification of status was completed in the proposal budgeting process, and status checks are an ongoing part of monitoring.

II. ACTIVITIES

This quarter, like the previous quarter, marked a period of start-up for GTD as a whole. In July, programming staff of The African-American Institute moved from the former PIET office to the World Learning GTD office.

Monitoring services are ongoing for the following seven participants:

Ms. Charlotte Kabunyoma
Ms. Alice Kakana
Ms. Fausta Ngendanimana
Ms. Laetitia Nikuse
Ms. Fides Nkunzimana
Ms. Regine Reguma
Mr. Epimanque Ntirushwubwenge

The six female, undergraduate participants were part of the PIET caseload of Program Officer, Ms. Sofia Tangalos, until mid-July, when she relocated out of state, which coincided with the ending of PIET programming. Ms. Tangalos briefed a temporary GTD Monitoring and Support Specialist, Ms. Lucy Gebre-Egziabher, who handled the monitoring during the transition period, from mid-July to the end of September 1997. As of October 1, 1997, former PIET and current GTD Monitoring and Support Specialist, Mr. Randy Blandin, is assuming responsibility for all the African participants under World Learning's GTD contract. He has monitored the program of the one male graduate participant from his arrival during the PIET contract to the present.

PROGRAM HIGHLIGHTS:

B.S. Marketing

Charlotte Kabunyoma, English Language Training (ELT), University of Nebraska, Omaha, followed by B.S. Marketing, Tuskegee University, Tuskegee, AL, April 17, 1994 - May 31, 1998

Summary: Ms. Kabunyoma continues to do well in her program and is scheduled to complete her degree May 1998. In the Summer semester, Ms. Kabunyoma took three courses: "The Black Aesthetic"; "Introductory Calculus"; and, "Human Development". She achieved a 3.2 grade point average (GPA). In the Fall of 1997 Ms. Kabunyoma is taking six courses for a total of 18 credit hours: "Marketing Research"; "Retail Management"; "Promotional Strategy"; "Business Policy"; "Managerial Economics";

and, “Elementary Spanish”. These courses fulfill either a general university requirement for the undergraduate degree, a university School of Business requirement, or a business elective for graduation.

B.S. Business Accounting

Alice Kakana, English Language Training (ELT), University of Nebraska, Omaha followed by B.S. Business Accounting, Tuskegee University, Tuskegee, AL, April 17, 1994 - May 31, 1998

Summary: Ms. Kakana is doing well in her program and also anticipates completing her program May 1998. Ms. Kakana took one course, entitled “The Black Aesthetic”, in the Summer 1997 semester. She is enrolled in three courses for nine credit hours in the Fall 1997 semester: “Cost Accounting”; “Advanced Accounting”; and, “Auditing”. She currently has a 3.6 GPA. Her course selections also meet general university or School of Business requirements and elective hours needed for graduation. She has not reported any difficulties meeting her completion date.

B. S. Business Administration

Fausta Ngendanimana, English Language Training (ELT), University of Nebraska, Omaha followed by B.S. Business Administration, Tuskegee University, Tuskegee, AL, April 17, 1997 - December 31, 1997

Summary: Ms. Ngendanimana is preparing to complete her degree program and depart the U.S. in December 1997. She has done extremely well in her course work and currently holds at 3.83 GPA. During this quarter, she finished the course entitled "The Black Aesthetic", and she is taking four courses in the Fall semester for a total of 10 credit hours: “Business Ethics”; “Advanced Accounting”; “Principles of Auditing”; and, “Social Dance”. With these courses and the combination of others she took during past terms, she will meet the university degree requirements.

The Monitoring and Support Specialist is communicating with Ms. Ngendanimana about her return travel plans, because she has expressed reservations about returning home. The monitoring staff will continue working with her regarding return issues.

B.S. Accounting

Ms. Laetitia Nikuze, English Language Training (ELT), University of Nebraska, Omaha followed by B.S. Accounting, Tuskegee University, Tuskegee AL, April 17, 1997 - May 31, 1998

Summary: Ms. Nikuze is performing well academically and is currently slated to complete her degree program May 31, 1998, as scheduled. Ms. Nikuze took one class over the Summer, “English Composition III”, and she received an A. She is taking four

courses in Fall 1997, “Advanced Accounting”; “Business Law”; “Tax Accounting”; and, “Auditing”, for a total of twelve credits to meet the business degree requirements. She is currently maintaining a 3.67 GPA.

In addition, both Ms. Laetitia Nikuze and Ms. Fausta Ngendanimana have qualified for Tuskegee University's Annual Honor Roll based on their GPAs. A letter received from the Tuskegee University Provost, October 7, 1997 states:

> "...I am pleased to inform you that Laetitia/Fausta has qualified for the Annual Honor Roll. This is in recognition of students' scholarly work and scholastic achievement Honor Students will receive the Honor Roll Certificate during the Seventy-Second Annual Scholarship Convocation, Sunday, October 26, 9:30 a.m., in the Tuskegee University Chapel..."

B.S. Business Administration

Fides Nkunzimana, English Language Training (ELT), University of Nebraska, Omaha followed by B.S. Business Administration, Jackson State University, Jackson, MS, June 5, 1994 - December 31,1997

Summary: Despite several requests, World Learning/AAI has not received an Academic Enrollment and Term Report (AETR) for Summer 1997 from Ms. Nkunzimana. The AETR is a standard USAID form to be completed each academic term by the participant, the academic advisor, and the Monitoring and Support Specialist. The AETR indicates courses completed and grades earned for the past academic term, courses enrolled for the next term, and estimated completion date. She did submit a University grade report for Summer 1997 to verify that she took one course, “Money and Banking”. She received an A in this course and she is currently maintaining a 3.2 GPA.

The Spring 1997 AETR indicated an estimated completion date of May 1998. PIET and World Learning/AAI contacted the academic advisor and the International Programs Office to make clear again that the participant was expected to complete all coursework for the degree no later than December 1997. The University indicated it was not offering some courses required for the B.S. Business Administration during the Summer term. Additionally, the University offered two required courses at the same time, making it impossible to register for both. In order to resolve this predicament, the Monitoring and Support Specialist arranged with the International Programs Office for Ms. Nkunzimana to take two needed courses at a consortium institution, Belhaven College, to meet Jackson State University (JSU) graduation requirements. Thus, Ms. Nkunzimana enrolled in 8 credits at JSU for the Fall 1997 term: “Leadership and Career Management”; “Commercial Banking”; and, “Human Resource/Personnel Management”. She also took two courses at Belhaven College, “Investments” and “International Business”. She is scheduled to complete on time, December 1997. The monitoring staff will work with her to make sure she is ready to return and will assist her in finalizing her departure plans.

B.S. Business Administration

Regine Reguma, English Language Training (ELT), University of Nebraska, Omaha followed by B.S. Business Administration, Tuskegee University, Tuskegee, AL, September 6, 1994 - December 31, 1997

Summary: Ms. Reguma continues to perform well in her program and is still scheduled to complete her degree in December 1997. As was the case for Ms. Nkunzimana, the Spring 1997 AETR for Ms. Reguma also indicated an estimated completion date of May 1998. Over the Summer, Ms. Reguma took two courses, "Human Resource Management" and "Money and Banking", and received a grade of B in each course. In Fall 1997, she is taking five courses for a total of 14 credit hours: "History of Economic Thought"; "Commercial Banking"; "International Business"; "Collective Bargaining"; and, "Promotional Development". The academic advisor informed PIET and World Learning/AAI there was a scheduling conflict at Jackson State University of two senior-level courses being offered at the same. She needed to complete both courses, "International Business" and "Commercial Banking", for graduation. Thanks to cooperation from the head of the International Programs Office, Ms. Reguma was also able to take a needed course at Belhaven College, to compensate for the course schedule overlap at Jackson State University. During this final term, the monitoring staff will remain in close contact with Ms. Reguma to address departure issues, including her travel itinerary.

M.S. Conflict Resolution

Epimaque Ntirushwubwenge, M.S. Conflict Resolution, Duquesne University, Pittsburgh, PA, January 1996 - May 31, 1998

Summary: Mr. Ntirushwubwenge returned to the U.S. in late August from Burundi, where he was an intern for the summer with the United Nations Commission on Human Rights. The internship was a requirement for his degree, and Mr. Ntirushwubwenge is incorporating some of the research from the experience into his thesis. The subject of his thesis is "Integration of African Armies in the Building of a Democratic Society". He indicated the internship was a great experience and commented he had the opportunity to work with women and children from different ethnic groups. Mr. Ntirushwubwenge met with a number of Burundi government officials who are working to try to resolve some of Burundi's more pressing ethnic issues. He also worked at the UN Center for Human Rights, where he made an important contribution by updating a computer database. Mr. Ntirushwubwenge has made several presentations on his internship experience for faculty, staff, and students at Duquesne University and also at local conferences. Mr. Ntirushwubwenge states he will take one last required course in the Spring 1998 and will also continue working on his required master's degree thesis, in order to complete the degree in May 1998. For additional information on the internship, please refer to Attachment 1, the participant's internship summary report.

For additional information on training during these this quarter, please refer to Attachment 2. It lists each participant's name, training program, dates, budget, actual expenses paid during the quarters covered in this report and balance of budget funds.

III. CONCERNS/CONSTRAINTS

A. ADMINISTRATIVE ISSUES

Based on expenses incurred and anticipated costs through each participant's projected completion date, more than sufficient funds were requested in the proposal budgets to cover participant direct costs. The full amount of funds requested according to the proposal participant budgets, or $207,010, was included in the other direct costs of the delivery order. However, some costs anticipated at the time the original participant budgets were prepared will not be incurred under GTD, either because they were paid by PIET, actual costs are lower than expected, or participants will not attend some supplementary activities that were budgeted.

For example, during the time between when the proposal was submitted and when the Delivery Order was signed, PIET continued to make payments, including May monthly maintenance allowance (MMA), some summer tuition and the Health and Accident Coverage (HAC) payment through June 30, 1997. The only participant cost paid with GTD funds in the quarter ending June 30, 1997 was the June MMA payment. Then, effective July 1, 1997, the HAC premium was lowered from $100 for the U.S. entry and exit months and $150/month for intervening months, to $90/month. Given their Fall course and exam schedules, the three participants scheduled to complete in December 1997 elected not to attend a management re-entry seminar. Registration fee, lodging, M&IE, airfare and ground transportation budgeted for this activity came to $4,270 per participant. It is anticipated, per Attachment 3, Participant Budget Summary, that in all just over $29,000 budgeted in participant costs will be unspent.

However, a number of adjustments need to be made to the administrative budget, specifically the workdays ordered. This Delivery Order does not incorporate the annual multiplier and cost of living (COLA) increases set forth under the terms and conditions of the prime contract, Part 1, Section B.3(a)(1), as amended via Modification No. 1. To correct this oversight and to incorporate other needed adjustments, World Learning will prepare a revised budget for USAID/REDSO/ESA's consideration. Level of effort (LOE) for the Delivery Order Manager and other positions will be revised, and a change in the effective dates of the Delivery Order will be requested to allow for cost effective, but complete close out, including the filing of calendar year 1998 income taxes in 1999.

B. PARTICIPANT ISSUES

The primary issue for the first quarter of FY98 will be the exit monitoring and departure preparations for three participants who are scheduled to complete their degrees in December 1997:

Ms. Fausta Ngendanimana
Ms. Laetitia Nikuse
Ms. Regine Reguma

These three participants have been in the U.S. for over three years. They have expressed reluctance and concerns about returning, given the changed political situation and the violence in Burundi since their departure. The remaining four participants are scheduled to complete their degrees and return home at the end of May 1988.

IV. RECOMMENDED ACTIONS

The World Learning team makes the following recommendations:

- That participant funds be made available to cover adjustments in the administrative budget.

- That REDSO/ESA provide World Learning/AAI with information locally available regarding the current situation in Burundi and risks for returning U.S.-trained Burundians. Specifically, any updated information the CO, COTR or designate can provide regarding the safety, estimated cost and suggested method of traveling; i.e. by land from Kigali to Bujumbura, by air from Nairobi to Bujumbura or alternate suggested routes would be appreciated, as ticketing on commercial flights is still not available from the U.S. all the way to Bujumbura. World Learning/AAI are aware participant Epimaque Ntirushwubwenge successfully traveled by road between Kigali and Bujumbura in May and August 1997.

- That REDSO/ESA advise World Learning/AAI of re-entry support it will provide to confirm participants' safe return, re-integration, and work prospects.

- That REDSO/ESA indicate any contact points for returning participants in Bujumbura and attempt to meet with them in Nairobi and/or Bujumbura if possible in early 1998.

ATTACHMENT 1

INTERNSHIP SUMMARY

Internship conducted 5/97 - 8/97 in Burundi by participant, Epimaque Ntirushwubwenge.

ATTACHMENT 2

GTD/REDSO/ESA for BURUNDI D.O. 1997 PARTICIPANTS
U.S. TRAINING
World Learning Status Report for the Quarter 07/01/97 - 09/30/97

Participant Name 09/30/97	Training Institution	Dates	GTD Budget	Expenses Paid 05/16-06/30	07/01-09/30	Balance as of 09/30/97
1. Charlotte Kabunyoma	University of Nebraska, Omaha Tuskegee University	04/17/94 - 08/17/94 08/18/94 - 05/31/98	$35,146.30	$815	$5,376.64	$28,954.66
2. Alice Kakana	University of Nebraska, Omaha Tuskegee University	04/17/94 - 08/17/94 08/18/94 - 05/31/98	$33,338.93	$815	$5,656.00	$26,864.93
3. Fausta Ngendanimana	University of Nebraska, Omaha Tuskegee University	04/17/94 - 08/17/94 08/18/94 - 12/31/97	$17,226.92	$815	$4,354.00	$12,057.92
4. Laetitia Nikuze	University of Nebraska, Omaha Tuskegee University	04/17/94 - 08/20/94 08/21/94 - 05/31/98	$32,873.70	$815	$4,304.00	$27,754.70
5. Fides Nkunzimana	University of Nebraska, Omaha Jackson State University	06/05/94 - 01/04/95 01/05/95 - 12/31/97	$15,697.01	$815	$3,130.40	$11,709.61
6. Regine Reguma	University of Nebraska, Omaha Jackson State University	09/06/94 - 01/04/95 01/05/95 - 12/31/97	$14,916.00	$815	$3,936.70	$10,122.30
7. E. Ntirushwubwenge	Duquesne University	12/25/95 - 05/31/98	$28,453.45	$3,324	$2903.16	$22,226.29

ATTACHMENT 2

GTD/REDSO/ESA for BURUNDI D.O. PARTICIPANT BUDGET SUMMARY

Participant Name	GTD Proposal Budget	Current Budget	Estimated Savings
1. Charlotte Kabunyoma	$ 36,275	$ 35,147	-$ 1,128
2. Alice Kakana	$ 35,020	$ 33,339	-$ 1,681
3. Fausta Ngendanimana	$ 24,390	$ 17,227	-$ 7,163
4. Laetitia Nikuze	$ 35,020	$ 32,874	-$ 2,146
5. Fides Nkunzimana	$ 24,689	$ 15,697	-$ 8,992
6. Regine Reguma	$ 22,209	$ 14,916	-$ 7,293
7. E. Ntirushwubwenge	$ 29,407	$ 28,454	-$ 953
	$207,010	$177,654	-$29,356

GLOBAL TRAINING FOR DEVELOPMENT
USAID/ECUADOR
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 807
Effective Dates: 07/01/97 - 08/30/98
Contract Total: $82,057
Obligated Amount: $82,057

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors (The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure) from July 1, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 807, with the U.S. Agency for International Development.

The report is organized as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions**. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

Through the GTD contract, three academic participants and their files were transferred from Partners in International Education and Training (PIET) to World Learning. During this quarter, PIET staff met with World Learning Monitoring and Support Specialist, Rachel Waldstein, to brief the latter on the status of the participants. PIET staff had previously contacted the participants as well as the academic and the international advisors by letter to advise them of the change in contractor. Ms. Waldstein followed up by letter and telephone to establish contact and begin to build a personal rapport.

All participant information and budgets were entered into World Learning's GTD Information System (GTDIS). HAC contractor identification was changed from PIET to World Learning. World Learning made required financial payments to students and universities.

Participants were contacted by World Learning staff on a monthly basis, often with more frequent contact to resolve particular issues. Academic and International Student Advisors were contacted bi-monthly or on an as needed basis. Ms. Waldstein began to plan for campus visits to the two students who would be in country during the Fall semester.

II. ACTIVITIES

Kleber Machado, PhD/Agricultural Economics, Cornell University, July 1995 - August 1998

Mr. Machado passed his qualifying examination and made plans to go to Ecuador for approximately five months to do research for his dissertation. He received approval from USAID/Ecuador to pay 60 percent of his monthly maintenance in order to keep his apartment while he was gone. The full amount was paid in advance so that the participant would not have to send the rent money on a monthly basis from Ecuador.

Cecilia Ortiz, PhD/Agricultural Economics, Utah State University, September 1995 - May 1998

Ms. Ortiz attended a conference of the American Agricultural Economics Association in Toronto, Canada in July. World Learning arranged her Canadian visa and signed the IAP to facilitate her attendance. She also continued to do research for her dissertation. Ms. Ortiz reported a new occurrence of a previous health problem, a lump in her breast. World Learning requested and received Mission approval to purchase extra university health insurance in case HAC does not cover some of her medical expenses.

Juan Carlos Wandemberg, PhD/Agricultural Economics, New Mexico State University, July 1995 - May 1998

Mr. Wandemberg began conducting research for his dissertation. He traveled to Ecuador from July 4 through August 13, 1997, accompanied by his advisor, Dr. Joel Diemer. He reported that he was disappointed with the logistical support he received from CARE during his stay in Ecuador. In September he purchased a computer, the cost of which (approximately $2,000) was to be reimbursed by CARE. Mr. Wandemberg expressed concern beginning in September that he would not be able to finish by December as he had previously thought. He informed World Learning of his concerns, which were forwarded on to the Mission. His advisor told Mr. Wandemberg that he would write a letter to the Mission to explain the need for a program extension.

III. CONCERNS/CONSTRAINTS

While HAC coverage through Acordia Healthcare Solutions was transferred from PIET to World Learning, to date only the September bill has been received and paid. That bill mistakenly charged $90 for Plan B, while the Mission had only approved Plan A, which costs $80. World Learning staff followed up on this with Acordia to ascertain that $80 would be paid and that students would be enrolled in Plan A. Students are covered by insurance despite problems with the billing system.

There was also a HAC issue of providing medication in advance for Kleber Machado, who was about to leave the US. He needs long term medication, for which Acordia only pays on a monthly basis. Since he was planning to be out of the US for five months doing research, he requested that Acordia pay for him to purchase all the medication he would need before he left.

That request was denied, and Mr. Machado was forced to purchase medication in Ecuador, which is more expensive.

Both Ms. Ortiz and Mr. Wandemberg expressed concern that they would need to extend their programs, and were unsure of Mission support.

Mr. Wandemberg made several requests of Ms. Waldstein, which were not in accordance with ADS 253 and/or the conditions of his training and which were denied. These included Mr. Wandemberg's insistence that the Monitoring and Support Specialist should intervene in his dealings with CARE regarding the purchase of a computer; and Mr. Wandemberg's request for reimbursement of books purchased in the Fall of 1996 while PIET was the training contractor. The Monitoring and Support Specialist wrote a letter explaining again why the requests were denied, and reiterated World Learning's obligation to comply with USAID policies in the administration of his program.

IV. RECOMMENDED ACTIONS

- World Learning has taken actions to clarify questions regarding HAC coverage and assist students in any way possible. World Learning will continue to pursue the resolution of difficulties in the billing system.

- The World Learning Monitoring and Support Specialist has provided and will continue to provide communication between the students and USAID/Ecuador to resolve any issues which arise as quickly as possible.

- Ms. Waldstein will continue to provide full and open communication to participants, including explanation of reasons for denying participant requests.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/HAITI
QUARTERLY REPORT
OCTOBER 1 – DECEMBER 31, 1996

Delivery Order No.: 01
Effective Dates: 10/01/96 – 09/30/97
Contract Total: $221,738
Obligated Amount: $221,738

This Quarterly Report summarizes the activities of World Learning and its subcontractors (The African-American Institute, AMIDEAST, The Asia Foundation, Creative Associates International, Inc., and *Development* InfoStructure) from October 1 through December 31, 1996, for the Global Training for Development (GTD) Indefinite Quantities Contract (IQC) No. FAO-5885-I-00-6020-00 with the U.S. Agency for International Development.

The report is organized chronologically by the effective dates of each Delivery Order as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions. Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. HAITI

Delivery Order No.: 01

Effective Dates: 10/01/96 - 09/30/97

Contract Total: $221,738

Obligated Amount: $221,738

A. SUMMARY

World Learning was awarded a single order Delivery Order from USAID/Haiti on September 30, 1996. The Delivery Order requires the placement, monitoring, and evaluation of 15 participants arriving in three groups between October 1996 and June 1997.

USAID/Haiti has not yet completed their Country Training Plan, but has determined which Strategic Objectives will be targeted for US training. They are SO 1: Democratic transition (building more effective and responsive democratic institutions and empowered communities); and SO 2: Economic growth (creating broad-based, environmentally sound, and sustainable increases in agricultural and urban incomes and employment). World Learning was contracted to provide all services to participants in French.

B. ACTIVITIES

1. Staffing For Delivery Order

In order to keep administrative costs low, it was decided that program staff administering this project would not work on a full-time basis. Rather, World Learning decided to phase the level of effort according to the way in which the participant training programs are scheduled. For example, **Group 1** arrived in October and left at the end of November. World Learning's Placement Specialist began the placement process for **Group 1** as soon as the

delivery order was signed. The Placement Specialist worked full-time until the participants departed. Since **Group 2** is not arriving until April, no staff time will be charged to the Delivery Order until the placement process begins in March. The final group (**Group 3**) will arrive in late June, so World Learning staff will work part-time in placing **Group 3** in May. After the last group departs, the staff will spend time closing out the financial files and writing a final report. If there are sufficient funds in the participant training and administrative budgets, World Learning will notify the Mission so that additional participants can be recruited and trained between June and September 30, 1997.

2. Cost Reduction Measures

Initially, World Learning planned to bring all three groups through Washington, DC for orientation en route to their training sites. These costs were included in the approved Delivery Order. However, it became apparent that it would be less expensive to send the Placement Specialist to the training site to conduct the orientations. This cost-reduction plan will allow World Learning to conserve sufficient funds to train two additional participants in **Group 3**. This plan reallocated about $12,000 from travel to training within the existing participant training budget. As the administration of this Delivery Order continues, World Learning will continue to assess expenditures on a monthly basis and make recommendations to USAID/Haiti as to how unexpended funds could be reallocated within the existing budget.

3. Project Implementation

The project start-up was smooth and work began immediately to place the first group of six participants scheduled to arrive on October 27, 1996. **Group 1** consisted of six NGO community representatives to be trained in ***Democracy and Civil Society for Haitian Community Action Organizers***. This group previously had been nominated and were in the process of being placed by Partners for International Education and Training (PIET).

As soon as World Learning received the participant files from PIET, requests for training proposals were distributed. Three training providers, the University of Pittsburgh's International Management Development Institute (IMDI), Tuskegee University, and the Mississippi Consortium for International Development (MCID), submitted competitive proposals. In the final analysis, IMDI could not bring their costs down sufficiently because of faculty salaries. Both Tuskegee and MCID, which are Historically Black Colleges and Universities (HBCU), were asked to submit final budgets. World Learning negotiated with both training providers and succeeded in reducing the cost of the final training program by just over $10,000. The contract was awarded to MCID, after approval by USAID/Haiti, with a final budget for the five-week training program of $40,548 (including housing). This training fee does not include participant M&IE, international travel, meet and assist costs, or HAC insurance.

a. The Strategic Objectives: Community Empowerment and Exposure to US Electoral Process

All activities for this training program supported the following three training objectives related to SO 1: 1) to expose participants to community level empowerment efforts in the USA; 2) to demonstrate how community autonomy and community economic development efforts can be achieved through NGOs; and 3) to expose participants to crucial electoral issues and the political process, including how politicians are accountable to their constituents. The program began with an overview of how NGOs in the USA are organized and governed and then explained principles and strategies they use to promote community and economic development. At this point, the role of civil society in a democracy was introduced and this served as an introduction for the five weeks of training.

USAID/Haiti specified that the Haitian community organizers needed to be exposed to the basic community organizing which could affect change even in severely disadvantaged circumstances. It was recommended that the program be held in both the inner city and depressed rural areas so that the participants could visit tenant-controlled public housing boards; community development and neighborhood watch organizations; decentralized parent-managed local school boards; and citizen police review boards. Since the program was held during the US presidential elections, visits to the local Democratic and Republican campaign offices were also planned so that the group could learn about the electoral process. The group visited polls on Election Day and participated in victory parties for local politicians.

The highlight of this program was the week the group spent in rural Mississippi with the Delta Empowerment Zone/Enterprise Community Learning Initiative to learn about strategic planning and fundraising. Visits to the

Winterville community and the Metcalfe community in the delta were instructive. In the former location, citizens are addressing how to secure financial support to repair their water system; in the latter area, the community addressed the same problem 20 years ago and was successful in resolving it through political empowerment.

b. Participants' *Action Plans*

MCID planned a thorough program featuring community leadership activities to emphasize the practical training components. Since these are CLASP participants, training-of-trainers sessions in leadership skills, professional advancement, and how a democracy and free enterprise system can work in tandem were integrated into the program. Each week the participants devoted an afternoon to developing the *Action Plans* to target specific areas for improvement in their home communities. Further, they formed important linkages with US organizations and small businesses which can provide them with information and resources after they begin implementing their *Action Plans* in Haiti.

World Learning was informed by USAID that most of the participants had been successful in undertaking their *Action Plans* within two or three months. One participant, a journalist who hosts a weekly television show with guests to discuss issues pertaining to human rights and civic responsibility, has developed a plan to encourage audience participation by telephone. Inspired by the town meeting format he witnessed in the USA during the presidential elections, he organized and held several seminars for trainers to improve the strategic planning and capacity building skills of NGOs. He hopes that representatives of MCID will come to Haiti to observe and facilitate some of the meetings, workshops, and conferences that he plans to organize. Another participant is organizing civil education programs for children at the elementary and middle school levels.

In conclusion, the program was outstanding and the participants selected were excellent. The MCID staff praised the enthusiasm, initiative, and high level of interest of all the trainees. From the weekly interviews and written evaluation forms that the participants completed, it was evident that they thought the MCID staff and the training program to be very worthwhile. World Learning provided America's Development Foundation, the contractor which selected the participants, as well as USAID/Haiti, with copies of the weekly progress reports and the participants' *Action Plans* for their review.

C. CONCERNS/CONSTRAINTS

There were no concerns/constraints during this quarter.

D. RECOMMENDED ACTIONS

As there were no concerns/constraints, there are no recommended actions.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/HAITI
QUARTERLY REPORT
JAUNARY 1 - MARCH 30, 1997

Delivery Order No.: 01
Effective Dates: 10/01/96 - 09/30/97
Contract Total: $221,738
Obligated Amount: $221,738

This Quarterly Report summarizes the activities of World Learning and its subcontractors (The African-American Institute, AMIDEAST, The Asia Foundation, Creative Associates International, Inc., and *Development* InfoStructure) from January 1 through March 31, 1997, for the Global Training for Development (GTD) Indefinite Quantities Contract (IQC) No. FAO-5885-I-00-6020-00 with the U.S. Agency for International Development.

The report is organized chronologically by the effective dates of each Delivery Order as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions. Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

This Delivery Order requires the placement, monitoring, and evaluation of 15 participants arriving in three groups between October 1996 and June 1997.

USAID/Haiti has not yet completed their Country Training Plan, but has determined which Strategic Objectives will be targeted for US training. They are SO 1: Democratic transition (building more effective and responsive democratic institutions and empowered communities); and SO 2: Economic growth (creating broad-based, environmentally sound, and sustainable increases in agricultural and urban incomes and employment). World Learning was contracted to provide all services to participants in French.

During this period, covering the second quarter, World Learning worked on the wrap-up of the first group of trainees and the procurement of the training provider for the second group of trainees for the Delivery Order.

II. ACTIVITIES

A. Staffing For Delivery Order

Due to the departure of Nancy Shulman, the Placement Specialist originally assigned to the Delivery Order, a new Placement Specialist, Nadine Asef-Sargent, was assigned in March of this quarter. In addition, to meet the demands of data entry for World Learning's Global Training for Development Information System (GTDIS) and other administrative support functions, a Participant Processing Assistant, Michelle Barrett, was added. Lisa Posner Olocco was added as Delivery Order Manager at 4 percent to provide overall project management and liaison with USAID/Haiti. While the LOE increased from 162 to 168 days, no additional funds were requested. The total amount for salaries actually decreased from the original and first revised budget.

B. Project Implementation

The final report and supporting documentation for **Group 1*, Democracy and Civil Society for Haitian Community Action Organizers,*** was received from the Mississippi Consortium for International Development and forwarded to USAID/Haiti.

The procurement process for **Group 2*, Small Business Development,*** was begun by Placement Specialist Nancy Shulman. World Learning contacted eight institutions known to offer off-the-shelf courses in Small Business Development/Management: Maine International Trade Center (MITC), Tuskegee University, Colorado State University, Clark Atlanta University (CAU), University of Missouri-Rolla, American Management Institute (AMI), Teledyne Economic Development Institute, and Florida Atlantic University Small Business Development Center. Due to the overwhelming number of off-the-shelf courses available, in French, in the subject matter, World Learning found it necessary to request additional information of interested training providers to ensure that all goals and objectives of the program (site visits, homestays, practical training, Experience America, *Action Plans*, etc.), and not only the technical subject matter, were incorporated into the program. A program profile and questionnaire was developed for each of the three potential training providers identified for competition (MITC, Tuskegee, and CAU). After receipt and thorough review of course brochures and questionnaires, World Learning recommended MITC as the training provider to USAID/Haiti. The Mission concurred with World Learning's recommendation due to the program content, clear understanding of CLASP objectives, language of instruction (French), and cost containment.

Although **Group 2** was in preparation for the arrival stage, the transition between Placement Specialists went smoothly, with the new Placement Specialist and Participant Processing Assistant taking charge of the already procured training program. Logistical details were finalized to ensure that all involved (USAID, World Learning, MITC) had all necessary information to deliver a quality training program for the participants.

III. CONCERNS/CONSTRAINTS

There were no concerns/constraints during this quarter.

IV. RECOMMENDED ACTIONS

As there were no concerns/constraints, there are no recommended actions.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/HAITI
QUARTERLY REPORT
APRIL 1 - JUNE 30, 1997

Delivery Order No.: 01
Effective Dates: 10/01/96 - 09/30/97
Contract Total: $221,738
Obligated Amount: $221,738

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors (The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure) from July 1, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 811, with the U.S. Agency for International Development.

The report is organized as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions**. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

This Delivery Order requires the placement, monitoring, and evaluation of 15 participants arriving in three groups between October 1996 and June 1997.

USAID/Haiti has not yet completed their Country Training Plan, but has determined which Strategic Objectives will be targeted for US training. They are SO 1: Democratic transition (building more effective and responsive democratic institutions and empowered communities); and SO 2: Economic growth (creating broad-based, environmentally sound, and sustainable increases in agricultural and urban incomes and employment). World Learning was contracted to provide all services to participants in French.

During this period covering the third quarter, World Learning worked on the implementation of the second group of trainees and the procurement of the training provider for the third group of trainees for the Delivery Order. The six participants in the second group were successfully placed with the Maine International Trade Center (MITC) in Portland, Maine. This training program was designed to meet SO 2: Economic growth (creating broad-based, environmentally sound, and sustainable increases in agricultural and urban incomes and employment).

II. ACTIVITIES

A. Staffing For Delivery Order

Staffing remained at the level of effort discussed in the second quarterly report.

B. Project Implementation

During this quarter, final negotiations were undertaken with the selected training provider for **Group 2, *Small Business Development***, the Maine International Trade Center (MITC). The final budget for the awarded five-week training program was $40,387 (including housing). This training fee does not include participant M&IE, international travel, meet and assist costs, or HAC insurance.

Also during this quarter, the procurement process for **Group 3, *Sustainable Hillside Agriculture and Natural Resource Management,*** was begun. World Learning contacted eight institutions to receive the Request for Training Proposals (RFTP): University of California at Davis, University of Florida, Iowa State University, University of Wisconsin, The Santa Cruz Institute, San Diego Center for International Visitors, California State University at Fresno and California State University at Chico. Of those institutions, only two submitted proposals in response (University of Florida (UF) and The Santa Cruz Institute). The Mission concurred with World Learning's recommendation of UF as the training provider due to the program content, language of instruction (Haitian Creole and French) and cost containment.

1. The Strategic Objectives: To Promote Sustainable and Ecologically Sound Production Systems that Optimize Responsiveness to Market Possibilities, and Protect the Environment

All activities for **Group 2** supported the following six training objectives related to SO 2: 1) to provide participants with practical tips from other successful entrepreneurs in the USA which can be applied to the context of the Haitian economy; 2) to assist participants in enhancing their personal entrepreneurial behavior and to provide them with the necessary tools to apply this behavior in their own businesses; 3) to enable participants to increase the production level of their operations; 4) to introduce participants to the role and importance of micro-businesses for profit in a developing country; 5) to provide participants with the most important aspects of small business management; and 6) to provide participants with the opportunity to develop their own ideas which may become the basis of their *Action Plans*.

World Learning arranged meet and assist services for participants in transit through Miami, Florida. MITC staff met participants upon arrival in Boston and transported them by van to Portland, Maine. Participants reported no problems with travel. Nadine Asef-Sargent, World Learning Placement Specialist, traveled to Portland, Maine to conduct an on-site program orientation. At this orientation, participants were briefed on all administrative matters of their program, including the purpose of the training and *Action Plans*, per diem, health insurance, and tax forms. Program content and cultural orientation were thoroughly reviewed by staff of MITC

before introducing participants to their hosts for the Lewiston, Maine portion of the program. The majority of the program took place in Lewiston, Maine, a largely Francophone part of the state, thus eliminating most of the need for interpretation. A preliminary needs assessment was conducted where participants were able to provide details about their businesses. This information was of great help to the training provider who in turn passed along the details to the internship businesses. In addition, participants were able to express other areas of interest and MITC did their best to incorporate these requests as they fit into the goals and objectives of the program (see below).

The program was structured in such a way to allow participants to first receive theoretical and classroom training in small business ownership, business planning, marketing, networking, bookkeeping, and recordkeeping. Interspersed with this, the trainees participated in workshops to develop their own business cards, brochures, and other business planning tools. The first two weeks of training laid the groundwork for the internship component of the program. Each participant was matched with a number of businesses (mainly Francophone) according to their work in Haiti as follows:

Paulna Andre: Grazziano's Restaurant, DaVinci's Restaurant, Arien's Inc., DuBois Cafe, Coastal Screening
Marie Nadia Cazeau Chery: Maraleece Faree Fashions, Arien's Inc., DaVinci's Restaurant, Coastal Screening
Wilnar Louis: VIP Auto Parts, Arien's Inc., Coastal Screening
Gerald Salomon: Falcon Shoe Company, Maine Shoe Company, Arien's Inc., Coastal Screening
Hermine Seraphin: Maraleece Faree Fashions, Arien's Inc., DaVinci's Restaurant, Coastal Screening
Aristhen Sirise: Maraleece Faree Fashions, Central Maine Technical School, Arien's Inc., Coastal Screening

Additional training added to the program based on participants' specific requests included a session on economic development and the environment, which covered land use planning, effective sitting of land use, natural hazards - how to prevent future problems, planning for better tourism, and defining natural resources. All participants reported that they came away from the session with a better understanding of the effect economic development and the local ecology has on their businesses and Haiti in general.

2. Participants' *Action Plans*

A summary of each participant's *Action Plan* is provided below, however, complete *Action Plans* were forwarded to USAID/Haiti with MITC's final report and World Learning's trip report. Among the most important linkages made by participants was a bra manufacturer interested in working with Marie Nadia Cazeau Chery to manufacture the product in Haiti for export.

Paulna Andre: Plans to enlarge her business and form an Association of Restaurant Owners. Ms. Andre was very motivated to provide extensive training to her employees in order for them

to do the best work possible. While in training, Ms. Andre designed and printed business cards, a brochure, and had T-shirts printed with her logo for distribution to her employees.

Marie Nadia Cazeau Chery: Plans to increase customer base and shop size. She will incorporate business management into her class presentations in order to train her students in more than sewing.

Wilnar Louis: Plans to introduce his company, Omni Auto Parts, via a brochure he developed in the training. He will begin rewarding customers that send business to Omni and begin offering discounts during off-peak business months (February and March). Mr. Louis also expressed an interest in starting a recycling business and discussed the possibility of recycling used environmental equipment from Maine to Haiti with owners of recycling operations and politicians including Maine State Senator John Jenkins and the Mayor of Lewiston, Maine.

Gerald Salomon: To compete with businesses importing inexpensive used shoes from the USA, Mr. Salomon plans to diversify his business to include shoe repair. In addition, he will provide more training to Association of Shoemaking members (of which he is the Secretary/Treasurer) on how to cut production costs without compromising quality and the importance of marketing.

Hermine Seraphin: Plans to prepare for the international marketplace and will aggressively seek work from outside of Haiti. She will design a scarf with her name on it, train her employees in quality control, stock, customer service, marketing, accounting, human resources, and competition. She wants to instill in each employee the message that "together we can do it."

Aristhen Sirise: Mr. Sirise's *Action Plan* focused on the vocational school he manages rather than his tailoring business. He plans to restructure the vocational school to a three-tiered approach of training laborers, academic/technical classes, and continuing education classes. In addition, Mr. Sirise would like to provide on-the-job training in retail, inventory control, bookkeeping, and manufacturing by opening an on-campus store consisting of products made by the students (crafts, apparel, etc.) which eventually could be made available for export.

III. CONCERNS/CONSTRAINTS

Following the initial homestay, participants in **Group 2** expressed their discomfort with staying by themselves in a stranger's home and said they would prefer not to take part in the second scheduled homestay. In addition, participants would not check out of their hotel during the first homestay, causing MITC to incur unexpected hotel charges. Finally, unrelated to the above, despite repeated attempts on behalf of the Placement Specialist and Participant Processing Assistant, a final exit telephone interview with the group did not occur.

IV. RECOMMENDED ACTIONS

After discussion with Chantal Woolley, USAID/Haiti, the Placement Specialist instructed participants and MITC to attend their second homestays. MITC altered previous arrangements to allow participants to homestay in pairs. Ultimately participants refused to spend the night away from their hotel, although they did spend the weekend days with American families. As the

budget allowed, MITC was reimbursed for the additional hotel costs incurred by participants related to the homestays. Since participants were clearly briefed by USAID/Haiti and fully informed about the concept of homestays prior to their departure to the USA, no further recommendation can be made as to how this situation might have been avoided. World Learning believes this was purely an issue of individual personalities.

With regard to the missed exit interview, the final monitoring call occurred on May 12, 1997 (the last week of the program) and participants did return completed written evaluations which were forwarded to the Mission. In addition, the Placement Specialist was debriefed by MITC early the next week. Evidently, the missed telephone call was due to MITC scheduling changes and misunderstanding.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/HAITI
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 01
Effective Dates: 10/01/96 - 09/30/97
Contract Total: $221,738
Obligated Amount: $221,738

This Quarterly Report summarizes the activities of World Learning and its subcontractors (The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* InfoStructure) from July 1 through September 30, 1997, for the Global Training for Development (GTD) Indefinite Quantities Contract (IQC) No. FAO-I-00-96-90020-00 with the U.S. Agency for International Development.

The report is organized chronologically by the effective dates of each Delivery Order as follows: **Summary, Activities, Concerns/Constraints, and Recommended Actions. Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

This Delivery Order requires the placement, monitoring, and evaluation of 15 participants arriving in three groups between October 1996 and June 1997.

USAID/Haiti has not yet completed their Country Training Plan, but has determined which Strategic Objectives will be targeted for US training. They are SO 1: Democratic transition (building more effective and responsive democratic institutions and empowered communities); and SO 2: Economic growth (creating broad-based, environmentally sound, and sustainable increases in agricultural and urban incomes and employment). World Learning was contracted to provide all services to participants in French.

During this period covering the fourth quarter, World Learning worked on the wrap-up of the second group of trainees and the implementation of the third group of trainees for the Delivery Order. The seven participants in the third group were successfully placed with the University of Florida, International Food and Agricultural Sciences (UF/IFAS) in Gainesville, Florida. This training program was designed to meet SO 2: Economic growth (creating broad-based, environmentally sound, and sustainable increases in agricultural and urban incomes and

employment). World Learning contracted UF/IFAS to provide most services to participants in Haitian Creole or French.

A great amount of staff time this quarter was spent on file close-out for the Delivery Order. The trip report, final report and *Action Plans* for the last group, **Group 3**, were forwarded to USAID/Haiti.

II. ACTIVITIES

Group 3 consisted of seven agricultural technicians trained in ***Sustainable Hillside Agriculture and Natural Resource Management***. During this quarter, final negotiations were undertaken with the selected training provider, UF/IFAS, and the group was trained. The final budget of the awarded five-week training program was $29,015 (including partial housing). This training fee does not include housing outside of Gainesville, participant M&IE, international travel, meet and assist costs, or HAC insurance. No interpretation costs were necessary as the entire project was conducted in Haitian Creole, French, or English with the assistance of the Haitian Creole or French speaking trainers.

A. Cost Containment

The original Delivery Order budget included only three participants in **Group 3**. Savings in participant travel realized by sending the Placement Specialist to the groups' training sites for program orientation instead of bringing them through Washington, DC, and budget negotiations with the first two training providers, allowed a previous budget revision to include two additional participants to the final group. However, the budget negotiation efforts of the Placement Specialist and the cooperation of UF/IFAS in reducing the training budget, allowed two more additional participants to be trained in **Group 3** for a total of seven participants versus the original three budgeted in the Delivery Order. It is significant to note that these cost containment efforts allowed the additional participants to be trained without an increase in training or administrative expenses.

B. The Strategic Objectives: To Promote Sustainable and Ecologically Sound Production Systems that Optimize Responsiveness to Market Possibilities, and Protect the Environment

All activities for **Group 3** supported the following five training objectives related to SO 2: 1) to increase the trainees' ability to be analytical about the production, market, and role of the small farmer; 2) to upgrade skills in identifying crops for their potential market, and role of the small farmer; 3) to enhance skills in developing techniques to practice agriculture in drought-prone areas; 4) to augment skills in developing sound hillside soil and water conservation practices; and 5) to provide participants with the opportunity to develop their own ideas which may become the basis of their *Action Plans*.

World Learning arranged meet and assist services for participants in transit through Miami, Florida. UF/IFAS staff met participants upon arrival in Orlando and transported them by van to Gainesville, Florida. Participants reported no problems with travel. Nadine Asef-Sargent, Placement Specialist, traveled to Gainesville, Florida to conduct an on-site program orientation. At this orientation, participants were briefed on all administrative matters of their program, including the purpose of the training and *Action Plans*, per diem, health insurance, and tax forms. Program content and cultural orientation were thoroughly reviewed by staff of UF/IFAS. A preliminary needs assessment was conducted where participants were able to provide detailed information about their work and express any requests for additional training. Additional sessions added at the request of participants were on pineapple propagation and training techniques, both of which were delivered by UF/IFAS.

The training program was divided into four main areas to meet all the objectives set by USAID: *Tropical Fruit Crop Production and Propagation, Principles of Sustainable Agriculture, Integrated Sustainable Hillside Agricultural Systems*, and *Training Techniques*. Each session incorporated the use of adult learning techniques to maximize knowledge transfer. In addition, participants were provided with actual tools of the trade (grafting kits, seed, etc.) and written materials to assist in transferring the training to their work at home.

Tropical Fruit Crop Production and Propagation: This session served to improve and strengthen the propagation skills of the trainees in relation to citrus, mango, and avocado production through lectures, field trips, demonstration tours, and laboratory exercises.

Principles of Sustainable Agriculture: This session actually covered four separate modules (Sustainable Hillside Management, Agroforestry, Information Management and Farming Systems Research and Extension). The topics were addressed through lectures, farm demonstrations and tours, case studies, and information retrieval with a librarian. All methodology incorporated relevant examples to ensure that the training was relevant to the participants' home situation.

Integrated Sustainable Hillside Agricultural Systems: This session was conducted through site visits to the states of Georgia and North Carolina. Organic and conventional farming methods were observed. The agricultural practices had many features in common with the experience of the trainees, especially the constraints of cropping hillside land and the relative isolation of the farming areas from market. Participants received hands-on training working with Barry Rubenstein, a certified organic farmer, to fill his orders in preparation for market the next day. Several techniques appropriate to Haitian conditions were observed: hydro cooling of vegetables to enhance storage capacity and marketability, a floating system to raise vegetables for transplant, soil management techniques that do not use fertilizers or pesticides, the French intensive gardening approach and culling/packing of vegetables to satisfy quality criteria and keep clients purchasing the product.

Linkages were initiated with Jim Smith, owner of Earth Organics and New Dawn Coffee of Asheville, North Carolina, who organized several contacts for business opportunities for the participants. Among the possibilities discussed with the trainees was the import of Haitian coffee. Mark Ketchel of Neem Enterprises expressed interest in establishing business ties with some of the participants to work with him in his company which is dedicated to the global promotion and distribution of tree byproducts and bulk raw materials.

Training Techniques: This session was added at the request of the participants. Its purpose was to acquire training techniques to communicate and transfer development concepts effectively at the community level in Haiti.

C. Participants' *Action Plans*

Each participant presented his/her *Action Plan* to the trainers in a ten minute presentation with a three minute question/answer period following. Five of the seven *Action Plans* concentrated on the transfer of improved propagation methods to local communities based on material acquired during the first two weeks of training. One *Action Plan* focused on the screening and subsequent distribution of vegetable seed acquired at the ECHO (Educational Concerns for Hunger Organization) farm. The final *Action Plan* covered new cultivation techniques associated with vegetable growing based on practices observed at organic farms in Florida, Georgia, and North Carolina.

III. CONCERNS/CONSTRAINTS

One participant, Marlene Raphael, became ill with an intestinal problem. The condition was not serious, although the training provider, and in particular the trainer, Joel Timyon, paid close attention to Ms. Raphael. She was taken to a doctor for treatment and prescribed over the counter medication for her stomach problems.

IV. RECOMMENDED ACTIONS

USAID/Haiti was kept informed of Ms. Raphael's condition. UF/IFAS was reminded of the Acordia HAC insurance policy and regulations. Against the instruction of both World Learning and the UF/IFAS Program Manager, Mr. Timyon paid for Ms. Raphael's medical bills himself. The health insurance carrier, Acordia, reimbursed most of the cost and sent the check to World Learning who in turn forwarded it to Mr. Timyon. As all proper steps were taken, World Learning has no recommended actions for future cases involving medical care of this nature.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/HONDURAS
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 810
Effective Dates: 08/01/97 - 03/31/98
Contract Total: $35,286
Obligated Amount: $35,286

This Quarterly Report summarizes the activities of World Learning Inc. and its subcontractors, The African-American Institute (AAI), AMIDEAST, The Asia Foundation, Creative Associates International, Inc. (CAII), and *Development* Infostructure from July 1, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 810, with the U.S. Agency for International Development.

The report is organized as follows: Summary, Activities, Concerns/Constraints, and Recommended Actions. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

Group of Twelve, Forestry Management, American Cultural Exchange, August 2- 16, 1997

World Learning coordinated a program for a group of twelve short-term participants in the field of forestry management. The Mission had already preselected the training provider, as stated in the Delivery Order. Therefore, World Learning did not competitively procure this program. World Learning contacted the training provider to confirm that they would be making the necessary logistical arrangements and requested that a training outline and budget be submitted. The World Learning Monitoring and Support Specialist, Ms. Waldstein, conducted orientation, monitoring and exit sessions, and made all financial payments required.

II. ACTIVITIES

The participants went to Seattle, Washington for a two week intensive training program comprised of classroom sessions; site visits to look at harvesting, protection, legislation of forests; and, computer work on Geographical Information Systems. The participants enjoyed the program and gained much practical information. They experienced no health problems or other

difficulties. Some reported that it would have been more convenient for them to return to San Pedro Sula instead of Tegucigalpa.

III. CONCERNS/CONSTRAINTS

World Learning was not notified until very soon before their arrival of the names and pertinent information on the participants, and no nomination forms were ever received. This made it more difficult to make logistical arrangements.

1V. RECOMMENDED ACTIONS

World Learning respectfully suggests that receiving participant information earlier would facilitate arrangement of logistics.

GLOBAL TRAINING FOR DEVELOPMENT
USAID/PANAMA
QUARTERLY REPORT
JULY 1 - SEPTEMBER 30, 1997

Delivery Order No.: 802
Effective Dates: 07/01/97 - 12/31/97
Contract Total: $124,745
Obligated Amount: $39,680

This Quarterly Report summarizes the activities of World Learning Inc. from July 1, 1997 through September 30, 1997, under the Global Training for Development (GTD) Indefinite Quantity Contract (IQC) No. FAO-I-00-96-90020-00, Delivery Order No. 802, with the U.S. Agency for International Development.

The report is organized as follows: Summary, Activities, Concerns/Constraints, and Recommended Actions. **Summary** provides an overview of the entire Delivery Order. **Activities** describes the accomplishments during the reporting period toward fulfilling the major tasks and deliverables under the Delivery Order. **Concerns/Constraints** describes any issues and/or problems toward fulfilling the major tasks and deliverables under the Delivery Order. **Recommended Actions** describes proposed solutions to address any concerns and/or constraints toward fulfilling the major tasks and deliverables under the Delivery Order.

I. SUMMARY

Under this Delivery Order with USAID/Panama, World Learning provides monitoring services in support of Giovanni Gomez, who is studying at New Mexico State University for a Bachelor's Degree Program in Soil Science. This program supported the Caribbean and Latin America Scholarship Program II (CLASP II), the primary objective of which is the "training of current and potential leaders from fields judged critical to the successful social and economic development of Panama".

II. ACTIVITIES

Program Administration

On July 1, 1997 World Learning assumed monitoring responsibilities for Giovanni Gomez's program, which had been monitored by Partners for International Education and Training (PIET). Giovanni is scheduled to complete his B.S. in Soil Science from New Mexico State University in December 1997.

World Learning is responsible for paying tuition, monthly maintenance, HAC, books and other academic expenses, as well as monitoring the progress of the student. World Learning also provides monthly progress and financial reports to USAID/Panama.

The Monitoring and Support Specialist was advised that Giovanni had experienced difficulties earlier in his academic career, and should be monitored closely to be sure he completed his degree requirements. Immediately upon taking over monitoring services, the Monitoring and Support Specialist called the student and his academic advisor, Dr. Mary Liesner, to inform them of the program administration change, and to make personal contact. The Monitoring and Support Specialist was assured by Dr. Liesner that Giovanni was doing well and would finish his degree on schedule in December. The Monitoring and Support Specialist has maintained close contact with the student through monthly calls. The student has also called the Monitoring and Support Specialist on occasion to ask questions.

In July, the Monitoring and Support Specialist sent the student a new IAP-66A form with World Learning listed as the programming agency, to update and replace the IAP he had received from PIET.

Experience America

To complement his academic training, Giovanni participated in several activities on and off campus, which brought him into contact with Americans and the local international community. He played soccer and participated in the International Student Association as well as the World Friends club, in which he helped to plan social events. He often cited these activities as most rewarding because he was able to help make other international students feel welcome and meet people from all different cultures.

III. CONCERNS/CONSTRAINTS

None at this time.

IV. RECOMMENDED ACTIONS

None at this time.