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SOUTH AFRICA

TRAINING FOR DISADVANTAGED SOUTH AFRICANS

(690-0213)

PROJECT PAPER AMENDMENT

May 1987

UNCLASSIFIED

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SOUTH AFRICA TRAINING FOR DISADVANTAGED SOUTH AFRICANS
(690-0213)
METHODS OF IMPLEMENTATION AND FINANCING

Method of Implementation	Method of Financing	Amount ($000s)
Institutional Contract (Long-term training)	Direct Payment	19,500
EOC Subcontract	Direct Payment	1,362
Institutional Contract' (Audit and Evaluation	Direct Payment	80
Inflation/Contingency		1,650
Total		$22,600

Drafted: RKing (AFR/CONT)

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I. INTRODUCTION

The Setting for the Proposed Amendment

This Project Paper Amendment seeks to continue the project begun in 1982 to provide scholarship assistance for graduate, undergraduate and professional study in the U.S. for disadvantaged South African students who will return to South Africa upon completion of their studies. Priority attention is given to training in the fields of business administration and management, accounting and finance, economics, physical sciences, computer sciences, engineering, education and law.

The project is presently being implemented through the Institute of International Education (IIE) and Aurora Associates, which are responsible for placement and monitoring of student participants in colleges and universities throughout the U.S. These two organizations work closely with the Educational Opportunities Council (EOC), a South African private and non-profit organization which has the responsibility for identifying, screening and selecting scholarship candidates. Funding provided by AID has been supplemented by U.S. private foundations and corporations through IIE and by participating colleges and universities themselves through tuition waivers. The continuation of the AID project is all the more important because of an anticipated lessening in the level of corporate support as a result of the recent withdrawal from South Africa of several corporate sponsors. Since the start of the project, a total of 466 South African students have come to the U.S. under AID sponsorship, of whom about 85 have completed their training and returned to South Africa.

Because of the ongoing nature of the project, the mechanism of a project amendment has been chosen, instead of developing a formal new phase. Implementation of the five-year continuation of the project covered by this amendment will be by a single prime contract, with sub-contract(s) to small disadvantaged concerns, women-owned concerns, small business concerns, and other Gray Amendment organizations strongly encouraged, to be awarded through a general competition in the spring of 1987. This arrangement will replace the two parallel contracts currently in force. Along with the addition of a relatively small new element for short-term training and greater emphasis on graduate, rather than undergraduate training, the basic project concept and methodology remains fully consistent with the original project.

The rationale under which this project was established in 1982 still remains. The inequities perpetrated upon the non-white population of South Africa by the Apartheid system of legal discrimination still exist, even though pressure for change continues to mount, through worldwide condemnation and the

applications of economic sanctions on the South African Government. The existence of this situation is now common knowledge, thanks to massive worldwide publicity over the past several years.

These inequities pervade all aspects of life for non-whites in South Africa, political, social, economic and educational. It is the latter about which we are directly concerned in this project. One of the most dramatic statistics underscoring the depth of the inequity is the fact that in South Africa today a white child is 100 times as likely to obtain a university degree as a black child. Since only a total of a few hundred blacks graduate from all universities in South Africa each year, one successful approach in overcoming this constraint has been to provide opportunities for as many as possible qualified candidates to receive relevant higher education and technical training abroad. The present project constitutes the largest systematic effort to plan and finance both graduate and undergraduate training for black South Africans in the United States.

It was in that context that the original program and its earlier corporate-sponsored counterpart were conceived. The emphasis was to be on graduate education in well-selected areas, although some students were allowed to pursue undergraduate degrees. Experience gained since the present project began in 1982 indicates that the program has been extremely successful and should continue along the same general lines as established at the outset. Academic results so far have been excellent, which credits the selection process and appropriate placement in U.S. institutions and reflects a high degree of motivation by the students themselves.

To date $30 million has been authorized for training under this project; virtually all of that funding will be exhausted following FY 1987 obligations. Because the project methodology requires a 12-month lead time for planning long-term training, it is essential that this PP amendment be approved and the project contractors on board no later than June 1987, in order to allow sufficient time for the contractors to mobilize and commence planning for the 1988 intake. Funding for the project amendment is budgeted at $24.3 million over a five-year obligation period, FY1988-92. This would bring the new LOP authorized total to a total of $54.3 million.

II. PROJECT RATIONALE

A. Current U.S. Policy

During the past few years education in South Africa has been a major issue in peaceful movements for social and political change. As a result, education has received extensive

international publicity, leading to a specific mandate by the U.S. Congress to support education and training for legally disadvantaged South Africans in the Comprehensive Anti-Apartheid Act (CAAA) of 1986. The CAAA declared that it is U.S. policy to assist the victims of apartheid as either individuals or organizations. This mandate particularly emphasized assistance in education and training. Section 103(b)(1) of this act refers specifically to training in the U.S., calling for "assistance to South African victims of apartheid without discrimination by race, color, sex, religious belief, or political orientation, to take advantage of educational opportunities in South Africa and the United States, to prepare for leadership positions in a post-apartheid South Africa."

B. Recent Developments in South Africa

The tone of the education debate, and of the school boycotts which accompany it, is radically different from 1976. Young people are angry and demand change. Many are turning towards a leftist ideology, unfortunately fuelled by slogans rather than an understanding of practicalities, as an expression of their frustration. These "comrades" are politicizing the education debate in their own way by demanding an education which is itself politicized, and by calling for a revolt against a white-dominated system which has used and abused black people. Their solutions are often radically different from those of their parents and teachers, but are a very potent, emotive influence on younger students.

With little other meaningful recourse, students have used school boycotts as the principal means of nonviolent protest against the education system, particularly at the secondary level. Although it is not clear that all students support such boycotts, student activists have generated sufficient peer pressure to effectively close down schools in major parts of the country in each of the past three years. At times, students have closed schools despite the opposition of parents and political and church leaders. Presently, students have agreed to end the school boycotts, but their continuing attendance is tenuous, depending partly on whether the SAG meaningfully complies with its promise to provide free books and stationery. In some cases, students have returned to the classroom, but are refusing to be taught until they become convinced that political circumstances merit a lasting truce.

One result of the increasing disruptions in the school system is that the precentage of black students passing university qualification exams has decreased from an average of 26.6 percent in the late 1970's to 11 percent from 1983-1985. Statistics are still not available for 1986, but the pass rate is expected to be low due to school boycotts in the Transvaal in the two months before exams. These most recent boycotts affected even private schools.

In normal circumstances, such developments could affect the viability of a university training program by reducing the eligible student population. In South Africa, the situation is mitigated by demographic changes. Even though pass rates have declined, the number of new students annually passing university entrance exams actually increased from about 5,500 in 1979 to over 9,000 in 1985. The principal reasons for this increase, at a time of school boycotts, appear to be a bulge in the population distribution as well as a total increase in population.

In addition, the overall demand for university training has increased due to a backlog of qualified secondary school graduates who cannot afford to continue their studies. Each year, these and new graduates add to the total number of candidates seeking scholarships. It is also clear, however, that those eligible to go to universities constitute a smaller portion of the total black population due to the crisis in secondary education. Consequently, while there remains a strong rationale to continue a university scholarship program, these bursaries will meet an increasingly smaller portion of the education and training needs of disadvantaged South Africans.

C. Program Modifications

This apparent dichotomy has two major programming implications:

1) due to increased training needs and the high cost of U.S. university training ($14,000-17,000 per student year), there is an increasingly stronger rationale to balance external with internal training ($ 2,250 per student year), and

2) with the percentage of blacks eligible to go to universities decreasing, there is a need to diversify AID's education programs in order to reach a broader range of community leaders.

The importance of balance between internal and external scholarships is addressed in this PP amendment by limiting annual obligations for external long-term training to $4 million. This funding level will reduce the number of new students beginning U.S. training from approximately 110 in 1987 to 75 in 1988, with the total further decreasing in future years due to inflation. In FY 1988, $4 million will be programmed for internal scholarships with possible increases in future years contingent upon the availability of funds and an evaluation of the effectiveness of internal training.

To the extent possible, U.S. training will emphasize graduate studies, while the internal bursary program will emphasize undergraduate training. This will achieve a balance between the need to provide additional opportunities for university training and the value of sending future leaders to the U.S. for exposure

to American ideas and values. The proposed strategy is also consistent with the Administrator's directive in 87 State 23172 "to ensure the agency is obtaining the most cost-effective participant training possible, while maintaining the quality which is so essential to the agency's overall development objectives."

The need to diversify AID's education programs is addressed principally through USAID/Pretoria's Educational Support and Training Project (674-0302). Authorized in FY 1986, ESAT will respond to community-based efforts in education, as well as education initiatives that will provide a foundation for non-racial education in a post-apartheid South Africa. Such community-based education activities, moreover, reflect a general trend in South Africa of newly emerging non-governmental community groups seeking to provide basic needs and services unmet by the South African Government. This development reflects a growing consensus among black South Africans that government organizations will not respond to black priorities, that the government will not include respected black leaders in designing solutions to community issues, and that significant economic and social change will require local and private associations of citizens to organize themselves and collectively act upon their priorities.

It is anticipated that at a later date, the Training for Disadvantaged South Africans Project will help promote the emergence of leaders in private, community-based education and development initiatives by offering short-term training in fields such as organizational development, community organizing, project planning and financial management. At such times as A.I.D. and the Congress agree that short-term training is timely under this project, another project amendment to incorporate short-term training will be drafted and submitted to AA/AFR for approval and authorization. Since short-term is considered integral to this new phase of the project, a detailed description of the short-term training component is further discussed in this paper in the sections on Project Description and Implementation Plan.

The need for short-term training has been clearly demonstrated in USAID/Pretoria's brief experience with South African non-governmental organizations (NGOs) through the Legal Assistance, ESAT and Community Outreach and Leadership Development Projects. Due to the constraints apartheid has Omposed on freedom of association and speech, as well as the limited financial resources available to blacks, those disadvantaged by apartheid have previously had limited opportunities to organize and manage programs. An influx of donor assistance in the past 3-4 years has alleviated some financial constraints, but new and potential leaders emerging at the community level are often untrained and inexperienced in

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practical management. These leaders and the organizations they represent can identify their long-term objectives for social and political change, but are often unable to translate their agenda into practical implementation strategies. Many problems could be resolved through trial and error, but in South Africa's political climate there is often little room for mistakes without violating government regulations on fund raising, free speech and community organizing.

In this context, the short-term training component is expected to achieve beneficial results at several levels. Most important, it will support the emergence of community initiatives to promote peaceful change by upgrading the skills of community leaders. This contributes directly to one of the principal objectives of the AID South Africa program: strengthening the capabilities of black community organizations and leaders who will play a crucial role in South Africa's future. Secondly, such training will help organizations avoid inadvertent confrontations with the South African Government that could result from inexperience in standard organizational and financial practices such as bookkeeping, project planning, and publicity. Thirdly, practical training in these and related fields will enhance the impact of AID and other donor investments in community projects.

D. Black Leadership and Participation

Political developments in South Africa have also confirmed the importance of working with the Educational Opportunities Council on student selection. EOC's institutional development is discussed fully in the Institutional Analysis attached to the amendment as Annex D. EOC's political significance as a black-led and run organization is defined by the politics of education in South Africa. Education is a political issue because it has been used by the South African Government to institutionalize apartheid by providing blacks with inferior education that restricts their social and economic advancement and, hence, their full participation in society. Indeed, education in South Africa has always been a political issue. The difference now is that black people themselves are defining the terms of the political significance, whereas in the past it was defined by government administrators and educators.

There is by no means a consensus among blacks on how to resolve South Africa's education crisis. Education is so political that divisions and tensions in black politics have entered into the educational sphere and in many cases have become obstacles to constructive action. There is virtual consensus, however, that blacks should now have an opportunity to define their own solutions to problems which affect their livelihood.

EOC has been one response of black leaders and communities to the education crisis. EOC's origins and linkages to the community through its national and regional boards are discussed

in the next section of this paper, Assessment of the Project to Date and the Institutional Analysis annex. Its role in student selection has been both substantively and symbolically important. Symbolically, it has been clear that Black South Africans, not the United States Government, are selecting those victims of apartheid who will receive U.S. training. Although the U.S. might have received more publicity by selecting students itself, handling student selection through EOC has resulted in much greater credibility for U.S. efforts to promote change in South Africa. That is not to say that EOC has been free from criticism; indeed, all organizations active in education in South Africa are criticized, AID's emphasis on promoting EOC's own capabilities has been taken as a positive sign of U.S. commitment to build black institutions.

EOC has also been more accessible to black communities than would have been possible for an American contractor or U.S. government organization, thereby allowing greater black input into substantive aspects of student selection and training priorities. Undeniably, EOC must continue to extend its accessibility, particularly to rural areas. To date, however, EOC has achieved national geographic coverage through its selection boards. This contact with all parts of the South African population has allowed it to respond to concerns on selection procedures, training priorities, and geographic equity. A foreign contractor or organization may have been able to be equally responsive, but it is not clear that it would have generated the same input, nor could it have explained why it may not be possible to respond to certain community desires, such as deemphasizing student records and grades as selection criteria, without appearing to adhere to a foreign-defined agenda.

III. ASSESSMENT OF THE PROJECT TO DATE

A. Introduction

From 1983 until the present, the project has been carried out by the same two U.S contractors, the Institute of International Education and Aurora Associates, which have worked in close cooperation with a private South African group, the Educational Opportunities Council. This section of the paper examines the procedures and methodology employed by these three organizations, in an effort to determine their effectiveness in carrying out the objectives of the project. This will include a review of the various functions assigned to each entity, such as student selection, placement in U.S. universities, orientation, maintenance and monitoring, counseling and ultimate job placement. Since this project differs from the typical AID participant training program in several important respects, the cost effectiveness of this program will be also be examined.

While the assessment provides general answers to questions of contractor performance and sheds some light on implementation methodology, it does not constitute a full-scale evaluation.

The assessment is based largely on interviews with key personnel of the two U.S. contractors and a review of project records and documentation by an AID consultant, combined with an institutional analysis of EOC prepared by USAID/South Africa (attached as Annex D). The assessment did not involve any direct contact with the participating universities or with any of the students. This limitation is partially offset by data and insights provided by a November 1985 independent evaluation of the IIE South African Education Program (SAEP) by Florence Ladd, former Dean of Students at Wellesley College and presently with Oxfam America. Both this evaluation and the annual report of project activities submitted by Aurora included numerous student profiles and students comments on the program, which provided some sense of the background, aspirations and problems typical of the young South Africans participating in the program.

B. Implementation Methodology

1) Educational Opportunities Council - The EOC came into being as a result of the 1976 student unrest in protest of the inferior "Bantu" education in South Africa and the consequent lack of higher educational opportunities for blacks. The enormous legal, racial and social obstacles faced by blacks in obtaining a university education in South Africa as a result of the Apartheid system are notorious. Problems caused by inferior schooling and inadequate preparation raise another series of barriers. As recently as 1983, all South African universities together graduated only about 730 black graduates per year. One avenue to redress this inequity was to send more black South Africans abroad for higher education, which led to the creation of the South African Educational Program (SAEP) by IIE in 1979. EOC has been involved in this program from its inception.

EOC seeks to serve a number of broad objectives, including the improvement of the quality of black education at all levels, the assessment of future education and training needs of the black population arrangements for black students to pursue higher education abroad, the establishment of non-formal education programs, and the development of black-run organizations in the education and training field. EOC is clearly not currently staffed or funded to carry out all of these functions effectively and will require substantial external assistance in the coming years to cope with expanding demands.

EOC's main role in this project is to receive and process applications and to screen, test and select candidates for undergraduate and graduate training in the United States and to prepare them up to the point of departure. EOC performs this function not only for the AID project, but also for all the corporate and church-sponsored students under SAEP. In order to select 350 AID-financed students from 1983-86, EOC reviewed some 2,600 applications and interviewed most of these candidates. This is a very slow and labor-intensive operation, but to ensure

fair and equitable treatment, there are no shortcuts. To EOC's credit, despite the potential for favoritism, there is no evidence of tribal or geographic discrimination in the selection process. However, the Ladd Report recommended a better male-female balance in the SAEP, where men outnumber women 2 to 1 as graduate students and almost 4 to 1 as undergraduates.

The selection process is conducted both in EOC's Johannesburg headquarters and through Regional Boards where initial screening and interviews take place. The boards are located in Natal, the Eastern Cape, the Western Cape, the Orange Free State and the Transvaal, each comprising eight members who meet twice quarterly. Interviewers consists of four regional panelists, two EOC staff and two representatives of the U.S. academic community. Recommended candidates are then reviewed by the National Selection Panel, where representatives of IIE and Aurora join EOC staff and regional panel members. Following selection EOC guides students through the testing process, TOEFL, SAT, MLAT, etc. This involves not only arrangements, but considerable counseling by the EOC staff on U.S. procedures and standards. Following placement in U.S. universities by the American contractors, EOC helps students secure passports and begins pre-departure orientation.

The consensus among USAID/SA, IIE and Aurora is that EOC has performed remarkably well in the selection role. Not only are deadlines met and students dispatched on time, but the high level of academic achievement and extraordinarily low failure rate of students under this project attest to the excellence of the selection process. It is true, however, that the selection and preparation phase absorb virtually all of EOC's time and energies, so that there is little time, money or staff for other functions.

To date, EOC has provided only limited job placement support, for both political and practical reasons. In practical terms, students have not had major difficulties securing jobs upon their return to South Africa. IIE surveyed all graduates from its AID and corporate program in the autumn of 1986, and in November reported that: "despite the economic situation in South Africa, the SAEP alumni who have returned to South Africa seem to find appropriate and generally satisfying jobs in South Africa. With increasing white emigration, professional jobs are opening for blacks, and SAEP alumni are in a position to take advantage of these opportunities."

In this context, EOC has found it sufficient to forward the resumes of students who request it to employment agencies in South Africa. In addition, IEE and Aurora circulate a periodic recruitment roster to potential South African employers. IIE and Aurora encourage participants to submit up-to-date resumes for the rosters well in advance of when they expect to be on the job market, to minimize long-term unemployment after graduation.

Politically, additional attention to returning graduates could complicate their reintegration into their communities. It is the prevailing view in these communities that participants have already been given a rare opportunity to study in the United States and that to favor them further on their return with employment opportunities would provide them with undue assistance and hence an unfair advantage over their locally trained contemporaries. The conclusion is that it is to in the interest of all parties -- AID, EOC, the students and the U.S. contractors -- to handle placement issues sensitively to avoid possible charges of elitism.

In view of the increasing number of returning graduates -- some 145 AID- and corporate-financed IEE graduates and 20 Aurora-managed graduates have already returned to South Africa -- assistance with job placement may need to be pursued more actively in the future One option may be to promote more active alumni/ae and professional networks among graduates to exert pressure on employers to increase the pace of placing black South Africans in responsible professional positions. Professional networks may be particularly desirable as they could include graduates from universities within and outside South Africa, thereby minimizing the impression of elitism. Given the small number of annual SAEP graduates relative to the South African economy, moreover, the issue may be most effectively handled when analyzed from a broader perspective of black participation in professional and management positions.

Overall, EOC is at a critical stage in developing its institutional capabilities. Until 1986, EOC exclusively handled external scholarship programs. While these required extensive administrative and financial control for student selection, EOC did not have responsibility for student placement, counseling, monitoring and financial support. In 1986, EOC initiated an internal scholarship program with AID funding. The program began with 38 students, which did not impose a major additional burden. However, it has grown quickly with AID and other donor funding to over 200 students in 1987. EOC is aware that it must streamline its operations, relying particularly on the use of computers, in order to handle this added workload effectively.

EOC took the initiative to upgrade its capabilities by hiring a major accounting firm to design a computer-based management information and financial system. The contractor helped EOC establish a complete data base on its students in South Africa, but the software package proved cumbersome, did not integrate student and financial records, and was not accompanied by adequate trainign materials. Hence, all financial and student records are still kept manually.

To help identify specific technical problems with the computer system, USAID/Pretoria financed a consultancy by a computer specialist in February 1987. In a short time, the consultant

identified the principal programming problems, was able to correct some problems with minor modifications, trained EOC staff in simple data base manipulations, and identified additional training requirements. With just this preliminary assistance, EOC staff have found that they can quickly produce student reports, using the existing data base, which previously took days or weeks. Integration of student and financial records will require additional assistance.

EOC and USAID are presently reviewing the recommendations of this consultancy and have drafted a Request for Proposals to address pending needs. Any additional consultancies will be financed either through multidonor contributions, the Internal Bursary Program and/or the PM&R account. While the Internal Bursary Program most urgently requires computerized record keeping and finances, the existing computer hardware is adequate to also handle the records of students on U.S. training. With proper coordination between EOC and the U.S. contractor(s), EOC should then be able to maintain complete student records from selection through job placement. Clearly, this will also assist in strengthening alumni/ae and professional networks which could exert pressure on employers to accelerate hiring of black professionals.

2) Institute of International Education and Aurora Associates - IIE's South African Education Program (SAEP) began in 1979 with students sponsored by USIA (Fulbright), U.S. corporations and church groups. The present AID project began in 1982, with with the first year's implementation handled by USIA. In 1983, AID took over project management, with IIE as the prime contractor and Aurora as a separately competed 8(a) minority contractor. Both contracts were recompeted in 1985 and awarded to the same two contractors, but the share assumed by IIE was reduced from 75 percent to 67 percent, in order to give the 8(a) contractor a larger role (33 percent instead of 25 percent). The principal task of both contractors is the placement of all selected students in appropriate U.S. colleges and universities, along with ongoing maintenance and monitoring throughout their academic programs in the U.S. Although these basic functions are standard for all contractors managing AID participant training programs and therefore need not be described in great detail, there are several unique features of this program which set the project apart from all the others and must be considered in evaluating the performance of the two U.S. contractors. These factors are:

a) The large annual student intake for academic and professional degree programs averaging three years in length. The size of the 1983-87 program is illustrated by the following table showing the annual intake of new students.

	1983	1984	1985	1986	Total
IIE	62	62	63	76	263
Aurora	17	26	36	38	117
Total	79	88	99	114	380

b) The solicitation of and negotiation with U.S. colleges and universities for tuition waivers. This is an integral and unique part of this project. Whereas in virtually any other AID participant training program, the full cost of the training, including tuition, is borne by the AID contribution, in this project, with rare exception, the cost of tuition is borne by the accepting university through a tuition waiver. In the case of a few well-endowed private universities, the full cost of room and board is also covered. The exception is typically the smaller historically black college (HBCU), whose endowment does not permit such awards. In these cases, tuition, normally well below the cost of other private colleges or state universities, is borne by the project. This unusual display of generosity by American universities is motivated by a deep desire to do something positive to assist the black population of South Africa and to support the strong anti-apartheid sentiment on U.S. campuses. It constitutes a major financial concession by the academic community, made at considerable sacrifice, and cannot be expected to apply to other AID participant training programs. Despite the enormous goodwill of participating universities, it nevertheless requires substantial negotiating skills, experience and high-level contacts on the part of the contractors to persuade universities to devote scarce scholarship funds to this cause year after year. Commitments are usually made for the full length of the students' three year program and thus can involve $30,000 or more per person.

c) The highly labor-intensive management aspect and active monitoring required by the special sensitivity of this program. This is partly the result of the current publicity about South Africa and the high-profile, almost celebrity status of black South Africans working or studying at U.S. institutions. The President of IIE told the project consultant that of the 200 education programs which IIE operates, SAEP requires the most hands-on management and is the one about which IIE receives the most questions from the public, the press and the academic community. One reason for the especially close monitoring is the fact that the students are all private citizens, not civil servants sponsored by their own government who are answerable to ministerial authority in their home country. Although they are not bonded to return home after their training, as most AID participants are, evidence of intent to return to South Africa is a selection criterion, and so far almost all graduates have done so, except for those few who are pursuing additional training under other auspices in the U.S. or a third country.

C. Organizational Relationships

There appears to be an excellent synergistic relationship among the three principal management entities of this project. Interviews with key IIE and Aurora personnel revealed that each was well satisfied with the degree of coordination and cooperation received from the other. Both reported at least

weekly, sometimes daily, communication by telex with EOC in Johannesburg, and both indicated that EOC is doing a very commendable job at interviewing, selecting and processing candidates to come to the U.S. EOC is said to respond quickly and accurately to requests for information and action by IIE and Aurora, even though the workload sometimes overwhelms EOC's management capability. USAID/SA reports that recent improvements in EOC's computer capability have helped dramatically.

Perhaps because of the smaller numbers involved, Aurora has more individual contact with its students than is practical for IIE. For example, all Aurora students are personally interviewed by senior Aurora staff during the Denison orientation program. IIE relies on representatives from its six regional offices to deal with students on the personal level, but with the withdrawal of Fulbright funding, IIE regional staff no longer has budget to visit campuses to interview students personally. Problems must therefore be dealt with by mail or telephone, which loses the advantage of personal contact between students and contractor representatives. IIE would like to restore a small budget amount under this project to permit annual visits by regional representatives to at least major universities attended by several IIE students.

One factor which puts Aurora at an unnecessary disadvantage vis-a-vis IIE is in the area of negotiating for tuition waivers. The prestige of the SAEP National Council, often in the form of letters and phone calls to university presidents from its Chairman, Derek Bok of Harvard, and other distinguished Council members, is a major factor in helping IIE enlist the continued support of colleges and universities throughout the country in accepting students and providing tuition waivers. Although Aurora is part of the same program, it has not been covered by the National Council umbrella, thus requiring extra effort by Aurora staff in seeking university waivers. If the National Council mechanism continues to be used after the contract for the project extension is recompeted, care should be taken to ensure that its coverage includes any sub-contractor(s) who are also seeking tuition waivers under this project.

CONTRACTOR SUPPORT STAFF

Position	% of time on project
IIE	
SAEP Office, New York Headquarters	
Executive Director, SAEP	20%
Project Director, SAEP	65
Supervisor	65
Senior Program Administrator	55
Senior Program Administrator	55

Program Administrator	60
Program Administrator	35
Placement Officer	65
Secretary	55
Secretary	55
Secretary	55

IIE Regional Offices

18 regional representatives in 6 offices	5-10%

Aurora Associates

Executive Supervision	12%
Project Manager, SAHEP	75
Placement Officer/Counselor	95
Placement Officer/Counselor	95
Project Coordinator Administration & correspondence	97
Secretary	51
Clerk	30

In the view of AID Africa Bureau project staff and the project consultant, both contractors are represented by competent, dedicated project managers and support staff. Although several staff members of both contractors have limited overall experience or are new to the project (less than one year), or both in the case of some IIE staff, they appear to be well informed, well organized and responsive to the needs and questions of AID project officers. Both contractors have Project Directors (Managers) who are very experienced in administering educational programs and fully sensitive to the complexities of dealing with South Africa. The fact that IIE staff show a lower percentage of time devoted to this project reflects their responsibilities for other aspects of IIE's overall SAEP program.

Although for both contractors the number of staff assigned appears to be appropriate for their respective workloads, both show a significantly higher ratio of professional to clerical staff (at least 2 to 1) than other large contractors managing participant training programs (1 to 2 or more). In the case of Aurora as a for-profit consulting firm, the relatively large portion of higher salaried professionals funded mainly by the project adds considerably to Aurora's management costs. There is evidence that these costs have peaked and should decline as a result of greater automation and less senior staff time for student monitoring.

IIE Student Breakdown

AID-financed SAEP students in school as of 1/31/87

139 undergraduates
58 graduate students
197 total AID-financed

Principal Fields of Study

Engineering, all fields	36	Social Work	6
Education	26	Urban Planning	5
Business Administration	14	Economics	5
Mathematics	12	Agriculture	4
Accounting	8	Public Administration	4
Chemistry	7	TOEFL	4
Communications	7	Nursing	3
Computer Science	7	Counseling	2
Pharmacy	7	Law	2

SAEP Alumni*: Employment or Follow-on Activities, as of October, 1986

In South Africa

Employed in business	30
Employed in education	42
Employed in social/community work	10
Attorneys/advocates	6
Studying full time for PhD	1
Recently returned, job seeking	14
Academic dropouts, no data	2
Non-academic dropouts, no data	11
Returned to RSA, no data	25
Departed U.S. 1980-82, no data	4

In USA

Studying full time on other funding	36
Practical training/employment with U.S. firms	15
Recent graduates seeking study/practical training	10
Academic dropouts, no data	5
Married to U.S. citizens, no data	4
In prison (for vehicular homicide)	1

Other

Studying or employed in third countries	6
Deceased	4

Total SAEP Alumni* 226

*Figures for SAEP alumni include both AID-financed and corporate-financed students.

AURORA ASSOCIATES (SAHEP)

Aurora students - Principal Fields of Study

Engineering, all fields	21
Education	13
Business Administration	10
Chemistry	9
Psychology	8
Biology	7
Computer Science	6
Social work/counseling	6
Pharmacy	5
Urban Planning	4
Law	3
Economics	3
Journalism	2

Breakdown of Aurora students by intake year

No. of students	1983	1984	1985	1986
Male undergrad	12	12	10	19
Male graduate	3	1	10	4
Female undergrad	1	6	6	8
Female graduate	1	5	10	4
Male PhD	0	0	0	2
Male LLM	0	2	0	1
Transfers	1	3	3	1
Graduated & returned	8	9	3	0
Returned to RSA w/o graduating	1	0	1	1
Graduated, remain in U.S. for other study	4	2	2	0

D. Success of the Program in Academic Terms

An important indicator of the success of the program is the academic results achieved by the students, measured not only by grades, but also such indicators as dropout rate, failures and transfers. Because it is a long-term degree program, the grade point average (GPA) is a dependable objective measure of effectiveness. The most impressive single result is that both IIE and Aurora report average student grades higher than the overall average for American students in the same universities. IIE, for example, reports an average undergraduate grade of B-, while in 1985/86, 68 percent of all Aurora students had a GPA of 3.0 or higher (equal to B) and another 13 percent scored between 2.5 and 3.0 (C+/B-). The Aurora Annual Report for this project contains a brief profile (sometimes detailed) on each student. An impressive number have outstanding records (3.5-4.0 GPA) at some of the top U.S. universities and in some of the most demanding fields. For example, 40 percent of IIE's students are in engineering, business, math, accounting and chemistry (see table at the end of the assessment for a breakdown of fields).

There have been very few dropouts and failures, especially in light of the special pressures imposed on these students to return home to assist with family problems and crises resulting from the political and social environment for blacks in South Africa. Out of 226 alumni of SAEP, IIE reports 7 academic failures as of October, 1986, of whom 5 remain in the U.S. presumably seeking reinstatement. Another 11 SAEP students have dropped out and returned to South Africa for family, cultural or emotional reasons. In its 1985 Annual Report, Aurora indicated that only 8 students out of a total of 75 at that time had withdrawn without completing their studies.

Similarly, transfers have been minimal, indicating careful and appropriate placement by both contractors. Aurora reports 1 transfer in 1983, 3 in 1984, 3 in 1985 and 1 in 1986. IIE indicates 3 transfers in 1983, 2 in 1984, 4 in 1985 and 3 in 1986. There are, of course, more student inquiries about transfers, especially during the first semester of a student's program, many stemming from non-academic considerations such as cold weather, but most students drop any idea of transfer after they settle in and adjust to their new environment.

It is clear that the academic results of this project have been excellent so far. Credit for this success should go to all three organizations managing the project and especially to the students themselves. There are several reasons for the high level of academic achievement: 1) a careful selection process, overseen by EOC; 2) appropriate college placement in the U.S. by the two contractors; 3) an excellent orientation program (see next section); 4) strong motivation and commitment on the part of the students; 5) close monitoring and counseling by

university faculty and advisors. Student performance is all the more remarkable because in many cases it involves men and women who dropped out of "open" universities in South Africa, not as a result of scholastic deficiencies, but due to a variety of social factors, including harrassment at school, inability to use the library or other school facilities because of race, a 3-4 hour daily commute from their township to the campus and a poor home study environment, such as having to share a bedroom with several younger siblings. With the removal of these obstacles and the added incentive of being offered a once-in-a-lifetime opportunity to obtain a U.S. university degree, it is remarkable what a "dropout" can achieve (a 3.8 GPA at Princeton, in one case and a 4.0 GPA at the Lehigh School of Engineering, in another).

E. The Orientation Program

An important factor in the academic success of this program, as well as the low dropout and transfer rates is the orientation program provided to all new students from both the IIE and Aurora contracts at Denison University in Granville, Ohio. This four-week orientation from mid-July to mid-August has taken place annually since 1982 and is financed from the project through the two contracts. The orientation, which is very popular with the students, offers both academic and cultural features. On the academic side, remedial math, use of computers, writing and exam study skills are emphasized. The balance of the program deals with acculturation to American university life, with small workshops and discussions led by Denison faculty, former or current South African students from this program and representatives of IIE and Aurora.

Since this is the only occasion for all of the new-intake students to get together for a significant period before they disperse to their respective schools all over the country, an important by-product of the Denison program is the opportunity to develop new insights and a broader perspective on the socio-political structure of South Africa through an exchange among black, colored and Asian students from different regions of South Africa. The sharing of the mutual problem of apartheid and different ways of coping with it has proved valuable in enhancing political awareness and in forming bonds among students of various ethnic groups who might not interact at home.

Students give the Denison program high marks, especially for the practical tips in dealing with the unfamilar American educational system. Many have called the courses in remedial math, statistics and computer usage a real lifesaver, without which they would have been lost for much of their first year. Student criticism of the program usually centers around the small and isolated Denison campus in rural Granville, but this has the advantage of avoiding the distractions of a big city during a short and intensive course. Some graduate students

complain that the course is better suited to undergraduates and that separate courses should be offered to the two groups, but it is doubtful that this would be cost-effective.

With respect to overall cost- effectiveness of the Denison orientation, examination of the cost data submitted by Aurora indicates that the average cost of the orientation per student (excluding travel to school averaging $225) was $1,478 in 1985 and $1,663 in 1986. IIE reports an average cost of $1,275 for Denison, plus travel to school, the slightly lower figure being largely the result of economies of scale. Since this figure is approximately half the average monthly cost of all AID-financed short-term technical training and about the same as the average monthly cost of AID long-term academic training, its cost effectiveness appears to be more than satisfactory. Moreover, even without benefit of these calculations, both the program's management and the Ladd evaluation have taken the view that the Denison orientation program produces results well worth the cost.

Another aspect of orientation as well as overall program coordination is the annual conference, which is the only occasion when all the students sponsored by both IIE and Aurora meet together, with an agenda developed by the Student Representative Council. These three-day conferences are held during the Christmas holidays in a central location (Columbia, MD. in 1985 and Nashville, TN in 1986) and attract up 300 student participants, as well as representatives of IIE and Aurora. The agenda covers such topics as networking and support systems designed to benefit students not only while they are in the U.S. but also when they return home. Student workshops are also conducted on subjects such as law, educational pyschology, women in development, etc.

Conference costs are high, about $1,200 per student for Aurora and $700 reported by IIE, including travel and administration. For this reason and the fact that growth in the size of the program and in the number of participants has made the conference too large and unwieldy, the present contractors considering the alternative of a smaller, less costly series of regional gatherings next year. Since the benefits of these conferences are largely intangible, cost-effectiveness appears to be questionable, especially compared to the Denison orientation program, which costs not much more, lasts ten times longer and serves a critical function in preparing the students for attendance at U.S. universities.

F. Overall Cost-effectiveness of the Project

Analysis on cost-effectiveness of the project to date is available under separate cover from AFR/PD/SA.

IV. PROJECT DESCRIPTION

A. The Structure of the Project

Goal: The goal of this project is to contribute to the process of preparing legally disadvantaged South Africans (blacks, Asians and so-called Coloreds) to participate at all levels of skill and responsibility in South Africa's industrialized economy and to prepare blacks for positions of leadership in a post-apartheid South Africa.

Purpose: The purpose of this project is to provide undergraduate and professional (graduate) training in accredited institutions of higher education in the United States for legally disadvantaged South Africans who are expected to return to South Africa upon completion of their studies. In the continuing phase covered by this amendment, the project may also provide short-term technical and management training for community-based black leaders and professionals. This new project element, along with continued emphasis on long-term academic, especially graduate degree training, would seek to help implement the mandate of the U.S. Comprehensive Anti-Apartheid Act of 1986, described in the Project Rationale section of this paper.

The program's long-term training targets focus on fields of study which will allow participants to participate more meaningfully in the present South African economy. Accordingly, the program has emphasized the following fields: engineering, mathematics, physical sciences, economics, business administration, and both business and science-related fields. The program has also trained students in the social sciences such as political science, sociology, law and urban planning. In order to place greater emphasis on the training needs of a post-apartheid South Africa, the project will seek greater emphasis on the social sciences to help prepare blacks for positions in national and local government which have been denied under apartheid.

The training focus of the short-term component would be defined by the needs of newly emerging community leaders who are seeking to address the educational and developmental needs of their communities through non-governmental organizationa. Based on discussions with black educators and community leaders, as well as USAID/Pretoria's experience with community-based organizations, illustrative courses would include: community organizing skills; organizational development; administration/finance/ accounting for community based organizations; marketing techniques for small businesses; group training skills; planning/setting objectives/mileposts; project implementation/management for community-based organizations.

Outputs:

1. Long-term training: The total output of students in long-term training in the U.S. in the overall project will be approximately 931, including both the 390 prospective graduates under the project extension and the 541 who will have completed their course of study under the current phase of the project.

2. Short-term Training: Under the project extension, approximately 222 individuals, primarily from community-based organizations, may receive technical and management training averaging about six weeks duration in the U.S and third countries. As many as half of those receiving short-term training are expected to be leaders of local organizations already receiving USAID assistance under other projects.

3. Institutional Strengthening of the EOC: The EOC is better able to function as an effective black institution in South Africa a result of funding, training and management assistance, including computer hardware and software, furnished under this project. Assistance provided to the EOC's Career Development Program will further enhance the capability, prestige and influence of the EOC within the black community, as well as its bargaining position with the South African Government.

In selecting scholarship recipients, the preference is for mature students who have the personal conviction to sustain them during their adjustment to study in the United States and their reentry into life in South Africa. The demonstration of appropriate academic ability is assured through the EOC and U.S. contractor student selection process. The distribution of students should reflect evenhanded selection across all regions of South Africa and with regard to the balance between male and female students.

Additionally, the placement of students should reflect objectives of wide dispersion among U.S. post-secondary institutions. The U. S. contractor will seek to increase the representation of historically black colleges and universities in the U.S. among those receiving students to a target level of 10 percent of each annual intake of students. This continues an effort to include HBCUs begun during the present phase by IIE and Aurora. Although this will add to the cost of the program, since HBCUs are generally unable to grant tuition waivers, the social benefits of establishing long-term linkages between the black communities in U.S. and South Africa are potentially great, especially where these institutions can provide a high-quality education appropriate to the needs of the students involved.
With regard to short-term trainees, preference will be given to leaders and potential leaders in community-based oprganizations who (a) need to upgrade their skills, (b) can immediately apply their training in a practical way, and (c) are endorsed by their organizations and/or communities.

Inputs:

Project inputs consist of approximately $4 million per year in AID financing to provide scholarships to some 78 new intakes of students annually over five years. As they enter, students will be covered by a obligation of funds sufficient to complete their full respective academic programs, which average three years in length. Taking into account anticipated future tuition waivers, rising costs and a reasonable margin for contingency, estimated costs to AID over the project extension period will average about $17,000 per student, per year. This amount covers all costs, including international and domestic travel, student orientation, administration and contractor overhead. Funding will be channeled through the project contractor(s), who will provide monthly maintenance allowances to assigned students and will pay any tuition not covered by waivers. The school placement and monitoring services provided to students by the contractor(s) and the initial selection services provided by EOC are also considered project inputs.

If approved short-term training would cost about $6,000 per student, covering all expenses for an average training duration of six weeks. This would total $1,732,000 for all three elements of short-term training, of which $1.0 million is budgeted for the EOC's Career Development Program, $432,000 for the general program for community leaders and $300,000 for buy-ins from other USAID/South Africa projects, which would be funded from those projects and therefore not charged to this project.

B. Project Elements

Major element and features o: the project can be summarized as follows:

1) University/college expenses: Included in this category are specific scholarship costs, such as tuition, room and board on campus, books, clothing, laundry, incidentals, summer maintenance, medical insurance and international travel between South African and the U.S. AID will assure uniformity in conditions of U.S.-funded scholarships administered by contractors by requiring compliance with Handbook 10, Participant Training. Cost-sharing with universities, corporations and private sector interest groups and foundations will be maximized. In the case of universities, cost-sharing will be sought through tuition waivers, occasionally in conjunction with partial or full waivers of room and board.

2) The short-term training component: This would be a new element which has not been offered in the project to date. It is aimed at leaders of community based organizations who can profit from specific short-term training in areas of management, public administration, financial management, etc. Placement at U.S. institutions and arrangements would be handled by the U.S.

contractor(s). There would be three separate selection mechanisms to identify individuals to go to the U.S. on short-term training. The rationale of these three mechanisms, which serve different objectives and different audiences, are discussed below.

(a) Private, Community Based Organizations

If eventually approved, a general short-term training fund would be established which would permit the Mission to respond flexibly to training needs in the NGO community. Initially, $200,000 would be obligated to the prime project contractor for this fund, with an additional amount of up to $232,000 obligated in future years, depending on actual requirements. The organizations targetted for assistance are: (1) current recipients of small AID grants which are not of adequate size to contain training funds (e.g., legal assistance grant(s), but who could benefit from short-term overseas trainign; (2) prospective AID grantees who could benefit from training in advance of receiving a grant; (3) organizations funded by other donors where U.S. training could have a multiplicative impact on foreign assistance; (4) organizations which do not require foreign donor assistance for their programs but could benefit from U.S. training. This provision will allow USAID/Pretoria to extend its reach to additional organizations in South Africa without the administrative burden of a new grant agreement for each training program.

(b) Current Grantees under other USAID Projects

This element would allow other USAID projects to buy into the Training for Disadvantaged South Africans Project for short-term training. Grants under projects such as Community Outreach and Leadership Development (674-0301), Educational Support and Training (674-0302) and, possibly, new labor and small business activities will be sufficiently large to reserve funds for overseas short-term training. The grantee would be responsible for nominating one individual from the organization for the training program and for specifying specific training needs. Grant funds would be utilized to finance the training by "buying into" the Training for Disadvantaged South Africans Project. Hence, it is not necessary to provide funds under this project for such training, but the project authorization, if short-term traning is approved, would be expanded to accommodate the buy-ins.

(c) Career Development Program

The need for short-term training has also been identified by EOC and a consortium of U.S. west coast universities headed by the University of California. Since the initial developments in the EOC/UC program, numerous mid-west and eastern universities have also expressed an interest. Through private funding, EOC and these U.S. universities will launch preliminary implementation of the CDP in 1987. AID might then provide continuation funding for the CDP in FY 1988 and future years of the project.

In the CDP, EOC would establish relationships with community-based organizations throughout South Africa to develop criteria for selecting community leaders for training. Individuals backed by community leaders would be eligible to apply for a short-term training program combining formal academics and a practical internship. EOC would forward information on participants annually selected for training to the project contractor. The contractor would then place participants at appropriate universities, which would be responsible for developing programs in specific fields to be determined with EOC.

The purpose of introducing the new short-term training element is to provide more flexibility to USAID/South Africa in responding to the practical training needs of community leaders of organizations which are already receiving AID assistance, but for whom long-term academic training is not needed or appropriate. Buy-in provisions would be made to permit other USAID/South Africa projects to transfer funds to the external training project in order to make use of this mechanism to provide short-term training to persons related to activities in these other projects. Funding to support the EOC's Career Development Program and to respond to requests from the black community would come from this project.

Illustrative examples of subjects in which short-term training might be pursued include community-based skills training; organizational development; small organization administration, accounting and finance; marketing for small enterprises; group training skills; planning and project management for community-based organizations; apprenticeships in U.S. community organizations. To the extent feasible, facilities for this kind of training available in other African countries, such as Kenya and Zimbabwe, would be utilized.

See Section VI B(2)(B) of the Implementation Plan, Procedures for Short-term Training, for more details on implementation of this component.

3) <u>The Denison University orientation program</u>: This is a four-week combined remedial preparation and practical acculturalization to U.S. college life offered to all new students in the summer just before their first semester. This annual orientation program is to be continued throughout the project extension period. Its planning and execution are the responsibility of the contractor. Costs averaging about 1,500 per student, plus $225 for travel are borne from the contractor budget.

4) <u>Contractors' implementation</u>: The scholarship program will be implemented through a contract with a private U.S. institution, which will be encouraged to sub-contract with one or more of the following: small disadvantaged concerns,

women-owned concerns, small business concerns, or other Gray Amendment organizations. If different from the present two contractors, IIE and Aurora Associates, these two contractors will nevertheless continue to manage the students already placed and serviced by them. Fulfillment of the basic scope of work requires funding contractor's costs for staff salaries and benefits, travel within the U.S., to universities, student conferences, orientations, etc. and to South Africa if necessary, in addition to a wide range of communications requirements, support services and general administrative overhead. The contractor will be responsible for the following functions:

-- participation in the student selection process in South Africa in collaboration with EOC, private South African educators and educational institutions;

-- student placement in an appropriate U.S. academic setting, with full financial and administrative support;

-- student counseling and academic supervision, in collaboration with the university or college;

-- arrangements for work-related training experience or internship during university summer vacations to the extent feasible, as an alternative to summer school;

-- assistance with re-entry into South Africa upon completion of studies, as needed; and

-- assistance to EOC in job counseling and job placement for returned participants and follow-up with alumni/ae.

5) Institutional Support to EOC: In addition to the tasks described above, the majority contractor will administer the AID grant to the EOC, consisting of the support budget for selection services, short-term technical assistance, computer training, commodities involving office equipment and supplies. Payments to EOC will be made by the contractor on a pass-through basis.

6) Private Sector Contributions: U.S. corporations, foundations and church groups have demonstrated continuing commitment to the education of disadvantaged South Africans in the form of scholarship financing. Although those contributions fall outside the scope of this project, the granting of tuition waivers for the participants in this project by receiving colleges and universities enables the resources of the project to be stretched to cover perhaps twice the number of students as would be possible without the tuition waivers. Contractors will be strongly encouraged to continue to elicit corporate, foundation and university contributions to the scholarship program.

The External Scholarship Program is a complex undertaking, involving close collaboration between U.S. contractors, non-governmental South African organizations who do the selection of students, U.S. universities, corporations and foundations. The political and cultural sensitivities inherent in this undertaking make it unique, in that it combines all the administrative and logistical complexities of any large participant training program with the need to work in a highly visible, controversial country setting, where racial tensions, intolerable government interference and notorious inequities produce a continuously explosive environment. The customary support and cooperation of a Host Government is, is course, totally lacking.

The program has been coordinated in South Africa by the EOC, chaired by Bishop Desmond Tutu, General Secretary of the South African Council of Churches. The Council is multi-racial, and includes many prominent South African educators, who are anxious to expand opportunities for legally disadvantaged South Africans. The Educational Opportunities Council is divided into five regional boards, one each in Natal, Eastern Cape, Western Cape, Orange Free State and the Transvaal.

Overall supervision of the program in the United States comes from the National Council of the South African Education Program, a group of distinguished educators, businessmen and representatives of concerned organizations, chaired by Derek Bok, President of Harvard University. Since the National Council operates in the context of IIE's SAEP structure, Aurora as the 8(a) contractor is not officially covered by it. However, IIE does pass on to Aurora offers of tuition waivers which are surplus to IIE own needs. Assuming the continuation of the National Council as an oversight group, efforts will be made during the project extension phase to lend the influence of the Council to the sub-contractor also, in order to reinforce its campaign for tuition waivers. Under the present arrangement, the SAEP National Council does not cover Aurora students in its university tuition waiver solicitation efforts.

7) Job Placement: To date the project has not become heavily involved in assisting returning long-term graduates to find jobs in South Africa, nor in tracking their progress. Up to now, it has not been a major concern, because of the relatively small nunbers of returnees.

With increasing numbers and given the very sizeable investment of AID resources in promoting education to enhance job prospects in South Africa, the bureau and the Mission agree that a more activist posture should be taken for the future. Thus, the Mission will use PM&R funds to fund a study of options for assisting job placement: e.g., promoting development of professional networks among returnees to interact with potential employers; using local headhunter firms to match returnee skills

with job openings, etc. Depending on the outcome of the study, the Mission could then consider funding a small grant or contract for follow-on action.

The study also will incorporate research on recommended fields of study under the project, as they relate to job placement. Findings on fields of study would be reviewed and endorsed by the National Advisory Council, and then submitted to AID/W for review and approval. Ideally, this would be accomplished in time for final decisions on fields of study for the 1988 student intake.

V. FINANCIAL PLAN AND BUDGET

A. Budget Summary

The present project amendment adds $22.6 million to the $30 million previously authorized, for a new total life-of-project of $52.6 million. The proposed FY 1987 obligation of $5.5 million will be the final obligation under the $30 million project authorization, as amended in 1984. The following budget table is concerned with the new authorized amount of $22.6 million, to be obligated over the five year period FY 1988-1992. This table also includes a column for FY 1987, presenting the budgetted FY87 obligation figure of $5.5 million covered by the present project authorization. The budget presentation is complicated somewhat by the fact that the FY87 obligation comprises $3.8 million in funding for new intakes, $1.2 million in mortgage funding for the balance of the FY85 and 86 students, and $500,000 in start-up costs for the new contract.

B. Mortgage Analysis.

1985-86 mortgage -- Despite best budgeting intentions and efforts, both IIE and Aurora have incurred mortgages for students who began training in 1985 and 1986. For purposes of this PP amendment, mortgage is defined as unfunded commitments needed to see 1985 and 1986 intake students through to degree. Stated differently, this is the amount of money which must be obligated in order to complete training of the 1985 and 1986 intakes. This funding would be over and above money to finance the 1987 intake.

For IIE, the mortgage totals $166,600. Aurora's mortgage comes to $1,005,080. The total mortgage thus is $1,171,680 (or $1.2 million for budget purposes).

Future year mortgages -- A maximum of $5.5 million is budgeted for obligation under this project in FY1987. This would permit full funding of the $1.2 million mortgage, plus $500,000 to launch the follow-on contract, with remaining funds -- $3.8 million -- to be put towards the 1987 intake.

At an average weighted cost of $17,000 per year and an average length of training of three years, $3.8 million would fully fund approximately 75 students through to degree. This is considerably fewer students than the 110 originally planned for the 1987 intake.

Besides full funding of a reduced intake level, a number of other options were considered, including retaining the 110 intake level, not paying off the existing mortgage, and a combination of the two. These options were rejected because it was judged critical to fully fund the existing mortgage as soon as possible, and to avoid incurring any future-year mortgages.

The option of funding the reduced intake level after paying off the existing mortgage has several important advantages: it does not put undue pressure on mission resources budgetted for other projects; it ensures that the existing contracts can fully fund all students entering through 1987; it does not impose a mortgage problem for future years; and it simplifies project accounting and management.

The mission has confirmed that the lower intake level will not have significant visibility in South Africa, nor will it present difficulties vis-a-vis the Congress.
million in 1989.

C. Basis for Student Cost Calculations

The budget calculations are based on estimated average weighted cost per student per year of $17,000, times an average course duration of 3 years, or a total cost of $51,000 per student. This figure assumes the continued availability of tuition waivers from participating institutions at about the current rate. This is somewhat higher than the approximately $15,000 overall average figure per student/year for FY 1986, to take account of several factors, including: rising maintenance costs; a greater percentage of graduate students who are slightly more expensive because they tend to live off-campus; more tuition costs not covered by waivers because of expected greater use of HBCUs, which normally are unable to grant tuition waivers; and the possibility of additional start-up costs if a new contractor is introduced to the project.

D. The Inflation/Contingency Factor

In the project budget, a relatively modest combined inflation/contingency factor is used. Since we are dealing with an elastic product, the number of new student intakes could be reduced if necessary in any given year without jeopardizing project objectives. However, for the EOC sub-contract, inflation is calculated separately at 10% per year, compounded, to take account of the higher rate of inflation in South Africa. Even though domestic inflation is partially offset by

periodic declines in the value of the rand, this does not fully compensate because of South African gold production. For the project budget as a whole, we have added a non-compounded inflation/contingency factor of 5% for 1988 and 1989, 6% for 1990 and 10% for 1991 and 1992. This escalation is deemed adequate in foreseeable circumstances. Full compounding at a 5% rate throughout the project adds more than $1 million to inflation in each of the last two years of the project which is deemed excessive. It is considered preferable to deal with any cost escalation beyond the level indicated through a reduction in the intake of new students in the final years of the project.

OBLIGATIONS BY FISCAL YEAR ($000)

	Current Project Authorization	Project Amendment					
	FY1987[1]	FY1988	FY1989	FY1990	FY1991	FY1992	TOTALS
Long-term Training							
Funding for new intake	3,800	3,500[2]	4,000	4,000	4,000	4,000	19,500
Mortgage to complete 1985 & 1986 intakes	1,200						
Mortgage to complete 1987 intake							
Start-up of new contract	500[2]						
Total Long-term Training	5,500						
EOC sub-contract		218	240	264	290	350	1,362
Evaluations/Audit		25		30	25		80
Sub-total	5,500	3,743	4,240	4,294	4,315	4,350	20,942
Inflation/Contingency[4]		187	212	305	432	522	1,658
Totals	5,500	3,930	4,452	4,599	4,747	4,872	22,600
Number of New Student Intakes Per Year	75	78	78	78	78	78	390

Total intakes under amendment 390

Footnotes to table on the preceding page:

1. FY 1987 obligation is for currently authorized project (LOP $30.0 million), all but $500,000 of which will fund current contracts.

2. $500,000 in FY 1987 obligation is for starting costs of new contract under project amendment, and this amount is therefore subtracted from FY 1988 funding level for new intakes to avoid double-counting.

3. Inflation/contingency for EOC line item is built-in at 10% p.a. compounded annually. Overall rate for inflation contingency is a flat 5% for 1988 and 1989, 7% for 1990, and 10% for 1991 and 12% for 1992, not compounded. See above text for explanation.

Long-term Student Intake by Year

1982[1]	1983	1984	1985	1986	1987	1988[2]	1989
86	79	88	99	114	75	78	78

1990	1991	1992	Total
78	78	78	931

1. Initial year of project was implemented by USIA
2. First year of student intake under the present project amendment (1988)

VI. IMPLEMENTATION PLAN

A. Contracting Arrangements

Since this project consists almost entirely of training in the U.S. (except for some third country training under the new short-term training component), implementation planning centers around the mechanism for contracting the process of student selection, placement, monitoring and support. In general, procedures established in the project which have been in effect since 1982 remain valid. The only new project element is the introduction of a short-term training component which aims at providing practical community-based manangement skills for community leaders. Selection of these trainees will be made by USAID/South Africa and the Educational Opportunities Council as set forth in the Project Description section of the amendment. Placement and support of the trainees in the U.S. will be the responsibility of the contractors in much the same manner as the long-term participants (see description of procedures below). Some of the short-term training will take place in Third World countries, and for these trainees, EOC and USAID/SA will play a more active role in placement and arrangements for training.

Since 1983 the present project has been implemented by two contractors, IIE as the larger entity, managing first 75 percent and later 67 percent of the project and Aurora Associates, as the 8(a) minority contractor, managing first 25 percent and later 33 percent. Both of these contracts were awarded competitively in 1983 and again in 1985 to the same two organizations. Thus this project has operated successfully with significant 8(a) participation, with Aurora's annual student intake doubling between 1983 and 1987.

However, it is the judgment of the Africa Bureau, the AID Contracts Office and the Office of Small and Disadvantaged Business Utilization that the available pool of currently eligible 8(a) firms does not favor a continuation of this arrangement. Aurora and other 8(a) firms of similar size and experience have "graduated" from 8(a) status in this area of contracting and are not eligible to bid for a future contract under the provisions of Section 8(a). After considering several possible options, it has been decided to advertize and award a single contract in a general competition, while encouraging bidders to make specific provision for a partner or sub-contractor, which should be a small disadvantaged concern, women-owned concern, small business concern, or other Gray Amendment organization.

While the implementation detail and costs will be negotiated by the Office of Contract Management, the contract scope of work will require the following:

B. Contract Scope of Work

1. General Description - The Educational Opportunities Council (EOC) will be responsible for student selection, processing and support in South Africa. The prime contractor will be responsible for negotiating a subcontract with EOC for the above purpose.

The contractor will have responsibility for coordinating and managing the U.S. activities of all participants funded under this project. The subcontract with EOC may also include provision for technical assistance as needed to strengthen EOC's management capability. Determination of the level of such assistance will be subject to negotiation with EOC, and will require the concurrence of USAID/Pretoria.

The contractor will establish detailed procedures for bringing students to the U.S., placing them in appropriate institutions, supporting them throughout their course of study, arranging for their return to South Africa, and maintaining follow-up information on their utilization of the training.

Priority fields of study, which have been determined from project experience to date, are as follows:

Priority Fields

Accounting
Agriculture/Agronomy
Business Administration/Management
Communications/Journalism/
  TV Broadcasting/Audio-Visual
Computer Science
Economics
Education
Engineering
Finance
Industrial Relations/Labor Relations/Labor Studies**
Law*
Sciences (biology, microbiology, chemistry, bio-chemistry,
  geology, geosciences, physics, zoology, etc.)
TOESL/TOEFL

Other Fields Which are Fundable

Anatomy/Physiology
Architecture
Counseling and Guidance
Dietetics/Nutrition/Home Ecnomics
Health Care Administration
Medical Technology
Nursing
Pharmacy
Physical Therapy
Planning/Urban/Regional/City/Urban Studies**
Public Administration
Public Health
Social Work

* Graduate only ** Preferably Graduate Program

Fields Funded Only for Up to 25% of Candidates

Anthropology**
Area and Ethnic Studies*
Ecology and Environmental Studies**
History**
Industrial Psychology**
Philosophy*
Political Science/Government
Psychology*
Social Science**

As mentioned earlier, the upcoming Mission-sponsored study on job placement will incorporate research on appropriate fields of study under the project. Thus, the above list will be subject to change in the near future. It is expected that priorities for study will continue to change, as the project evolves. Throughout the life of the project, the contractor will have responsibility for checking with the EOC and the Mission to update the approved list of fields of study.

The contractor will receive complete documentation of the participants' academic credentials and qualifications from the EOC. At that time the contractor will be expected to do the following:

(1) Notify students of admission/non-admission, through the Educational Opportunities Council, arrange for the orderly departure of the student, and meet the student upon arrival in the U.S.

(2) Provide for appropriate pre-enrollment orientation and remedial or preparatory study programs as necessary.

(3) Maintain a record system so that the individual student can be tracked through his or her entire program.

(4) Provide all AID-financed allowances to the participant during both academic and technical training programs (i.e. maintenance, travel and book allowances), and pay tuition and authorized fees to training institutions.

(5) Monitor all progress of each participant throughout the training process, using the procedure prescribed in AID Handbook 10.

(6) Assist EOC as necessary to submit to AID a follow-up report on the professional progress of each student one year after she/he has completed training in the U.S. and returned to South Africa.

(7) Serve as a source of data on the types and location of academic, technical and practical short-term training available in the U.S. The contractor shall be expected to use this information primarily in placing participants, and secondarily in providing information to AID as requested.

(8) Arrange for and administer all aspects of short-term training of the three types described below: general, buy-in, and EOC Career Development Program, working in close collaboration with USAID/Pretoria.

(9) Establish evaluation criteria and mechanisms that will allow for the periodic review of the individual training programs, in conjunction with USAID/Pretoria and AFR/PD/SA.

Tuition waivers are an integral and unique part of this project. This concept has been described in several sections of this paper and has been the cornerstone of project financial management to date. It is critical that the contractors continue to be successful in persuading participating U.S. institutions to grant waivers of tuition to the maximum extent possible. Generally, the contractor shall give priority to placing students in less costly state-related or public institutions where academic programs are equivalent, thereby maximizing the number of students who can be trained under this contract. Placing students in more expensive private institutions should normally be considered only if a substantial scholarship or cost-waiver is offered, unless the particular academic program is not offered at a comparable public or state-related institution.

The participants who will be assigned to the contractor represent only a portion of the total number of such individuals who travel to the United States each year for training under AID sponsorship. It is AID's policy that all participants receive equal treatment, in that each will be entitled to the same financial allowance, visa regulations, insurance coverage, etc. To insure this uniformity, AID maintains Handbook 10, dated April 30, 1981, which sets forth participant allowances, limitations, and restrictions. The contractor shall operate within the framework of, and adhere to the restrictions described within, AID Handbook 10. However, detailed operating procedures, controls, personnel arrangements, and information systems necessary for performing the work required hereunder shall be as described in the contractor's technical proposal, including any supplements thereto.

2. Specific Description

A) Long-term participants

1) Student selection process: The Educational Opportunities Council will have responsibility in South Africa for the annual student selection process, including the preparation of students for their departure to the U.S. The contractor's responsibility for direct student support, i.e. procurement of airline tickets, arrangements for travel advances, airline reservations, etc, will begin upon receipt by the contractor of student files from the EOC.

The contractor must verify that the selected students are academically qualified, have good prospects for placement in U.S. institutions, and have been chosen based on academic potential or merit. The contractor will assist the EOC in carrying out its student selection responsibilities by providing the following services:

-- Based on a schedule established with EOC, select and dispatch to South Africa U.S. representatives, some of whom will be college/university educators, to serve as resource persons on U.S. academic standards and requirements;

-- As requested by EOC, make all necessary arrangements for the candidates to take the examinations required for acceptance at many U.S. colleges and universities, including TOEFL, SAT, GRE, AND GMAT.

USAID/Pretoria or AFR/PD/SA will inform the contractor of the level of funding available in each year of the project, and will specify the minimum training years to be financed to achieve contract targets. The contractor will be required to maximize training years within those constraints. The funding will cover all costs (selection, orientation, placement, tuition, travel, administration. etc) for the selected students.

Before finalizing placements, the contractor will submit a report to USAID/Pretoria showing how the minimum requirements have been met for the period.

2) Development of Training Programs/Outline of Course Work: This is one of the key responsibilities to be assumed by the contractor(s). Based on information supplied in the student's application, academic credentials, bio-data and the contractor's own understanding and background knowledge of the training needs of participants in the program, the contractor shall be expected, immediately after receiving each new case, to arrange a suitable personalized training program for that individual. Each training plan is to include a description of the proposed training, a schedule and a detailed budget. In all cases placement will be sought where the best academic and/or technical program and support can be obtained, commensurate with the participant's qualifications and the project's goals. Contractors will bear in mind AID's target of placing at least 10 percent of all students in Historically Black Colleges and Universities (HBCUs). Long-term training is to be academically oriented, with the objective of obtaining degrees in specified fields.

3) Travel and Arrival: Once a particular training plan has been approved, the contractor shall arrange transportation for the participant to arrive on a particular date.

4) Orientation: The contractor will provide an orientation program appropriate to the needs of a foreign student in the U.S. The orientation must at a minimum include information on academic standards and requirements, and the essentials of day-to-day functioning at a U.S. college/university. The contractor should take all necessary steps to make the orientation as cost-effective as possible, and should be able to demonstrate why a particular length and format for orientation has been chosen. The contractor may wish to utilize the Washington International Center, AID's principal orientation contractor, in its orientation program. However, the

contractor may wish to continue the orientation pattern followed by IIE and Aurora under the present project, combining remedial courses with a practical introduction to American university life, conducted on the campus of a participating college during the summer, immediately upon the arrival of each annual intake group.

5) Financial Support: This is another critical contractor responsibility. The contractor will be expected to be highly sensitive to the importance of timely payments to the overall success of the program. The contractor shall propose how this is to be done so as to preclude the negative effect on the training experience inevitably caused by the delay of such payments.

6) Participant Monitoring and Counseling: The contractor shall establish a mechanism for keeping in touch with an monitoring the progress of individual participants during the course of their training. The contractor will advise USAID/Pretoria of any needed extensions to training programs, justify such extensions, and make timely estimates of additional funding requirements. The contractor shall use the standard AID Academic Enrollment and Term Report (AETR) for academic participants. A procedure shall also be developed to ensure that the general mental and physical health and academic standing of a participant is known at all times, so appropriate remedial action can be taken if required.

7) Completion of Programs and Departure: While it is normally A.I.D.'s policy not to sponsor individuals for consecutive degrees, even if these are non-A.I.D.-funded, this policy will be modified under this amendment.

In general, it is substantially more difficult for South African students, as compared to students of other nationalities, to obtain government approval to study abroad. Given this, and the fact that for returned trainees government permission to pursue a subsequent additional course of study abroad would virtually be out of the question, it will be A.I.D. policy for this project to assist all qualified students seeking visa extensions for additional degree training in the U.S.

This will involve contractor assistance in providing required documentation to A.I.D.'s office of International Training, which serves as sponsoring A.I.D. office, vis-a-vis the Immigration and Naturalization Service. Detailed procedures for approving students for visa extensions will be worked out following approval of this PP amendment.

8) Academic Training: Participants in some circumstances (if approved by AID) may be authorized supplemental practical training or experience, which will be arranged by the contractor. One example of the possibilities the contractor may be asked to explore is split-semester training, in which the student may pursue some studies for research in Africa between periods of study in the U.S.

9) Annual Student Meetings: In past years, the contractors have arranged an annual meeting of all active participants enrolled in long-term degree-oriented programs in U.S. institutions. These meetings have served as occasions for exchanging information among participants, and for the contractor to update participants on current happenings in the program.

In view of the high cost of annual student meetings, the contractor will be encouraged to explore other cost-effective options for networking under this phase of the project. Less costly regional gatherings may be one option.

10) Record Keeping: The contractors will be expected to store and easily retrieve information as needed to: (1) track each participant from the time of assignment through one year after completion of training; (2) produce annual progress and status reports to AFR/PD/SA presenting standardized data on individual participants and (3) maintain data on current expenditures which will assist AID in establishing an accurate obligation level for the following year and to provide data on which to base a mortgage analysis. The contractors should program their computers to provide a breakdown of students by field and level of training, to identify program and administrative costs separately, and to report AID-financed students separately from others whom the contractor may also be administering.

B) Procedures for Short-term Training:

(1) Selection Criteria: Assuming short-term training is ultimately approved, candidates for short-term training will normally be leaders of organizations which have received or are receiving USAID assistance. They will be actively involved in day-to-day operations of their organizations. Candidates will be required to show evidence that their organization understands and endorses their candidacy. A statement drawn up and voted on by the organizational membership will constitute such evidence. Each candidate will prepare a plan defining the skills he/she needs, and stipulating the ways in which those skills will be utilized on completion of training. Each plan will use behavioral descriptors which will form the basis for later evaluation.

(2) Selection Process: The following is the proposed selection procedure for the three different elements of short-term training, if it is approved.

(a) Private, Community Based Organizations--Under the project contract, a total of up to $432,000 will be provided for this element of short-term training. Funds will be obligated in five $86,400 increments as part of the annual obligations to the contractor in order to avoid any additional workload for the contracts office.

For mission-sponsored trainees, both under this category and the buy-in category below, current and prospective recipients of USAID grants will be advised of training opportunities and encouraged to propose employees or other involved persons for training. For organizations not receiving AID support, the Mission will identify prospective trainees through collegial contacts with other donors and NOGs in South Africa.

Nominations for training will be made by USAID/Pretoria Project Officers. Nominations will be considered at the quarterly project reviews, and the Mission will select three-four trainees each quarter. A letter will then be sent to the contractor specifying training needs and timing. If a specific training program is desired, the contractor will be instructed to place the participant(s) accordingly. If not, the contractor will be asked to provide three options (if possible, at least one option will be in an African country), which will be reviewed with the candidate. The contractor will then be instructed to place the candidate in the desired program. USAID will agree upon a standard information file with the contractor, and forward it with the placement instructions.

(b) Project Buy-ins--The project will provide for $300,000 in buy-ins over the LOP ($ 60,000 annually). When grants are executed under other projects (COLD, ESAT, etc.), funds will be obligated, when appropriate, for short-term overseas training for one individual in the grantee organization. Each grant will specify the timing of training, generally to be June-August in the year after obligation. The grantee will submit its nominee and the desired field of training 5 months before the scheduled starting date. The contractor will then be notified by letter in the same manner as (a) above. When the training program is selected, a PIO/T will be drafted to transfer funds from the sponsoring project to the contractor. To reduce contractor workload, to the extent possible, placement for these trainees will be combined with placement of those selected under training for community-based organizations.

(c) Career Development Program--$200,000 for this element will be obligated annually to the project contractor (total $1 million LOP). In consultation with the Mission, EOC is developing criteria for selecting community leaders for training. The selection procedure will be conducted in February/March of each year to take advantage of summer training programs. EOC will advise the contractor of its selections. The contractor will then contact universities which have subscribed to the CDP to determine suitable programs and will seek EOC and AID approval before finalizing placement. EOC will transfer the participant information files directly to the contractor.

(3) Placement of Trainees: For the Career Development Program, the contractor will clear student placement with EOC and advise USAID/Pretoria of the programs in which students are placed, as

well as provide evidence of EOC's concurrence with the training programs. For AID-selected trainees, the contractor will locate appropriate training programs (unless AID specifies a particular program), and will clear these with USAID/Pretoria. CDP training generally will take place in the U.S.; other short-term training will be take place both in the U.S. and third-world countries, split roughly two-thirds U.S./one-third third-world. For third-world training, both African and non-African training sites will be considered. Travel, arrival, monitoring, completion and departure of all trainee groups should follow the general procedures outlines under long-term training. There should, however, be few if any cases in which a short-term participant's program would be extended.

(4) Selection of Training Programs: The contractor will be responsible for selection of training programs. AID is encouraging as broad a participation as possible, among U.S. universities and other training facilities. Therefore, the contractor will be expected to develop criteria which will facilitate the contractor's judgment on the following factors: training institutions' ability to deliver a program on short notice for the range of participants' backgrounds and needs; cost of training; and ability to involve trainees in non-classroom activities which could assist trainees' career development, once back in South Africa.

These criteria would apply to CDP training, expected to last up to six months on average. For shorter term training, an additional criterion will be required, measuring training institutions' ability to package short course modules which could be assembled according to the commonality groups' particular needs and background.

(5) Travel/Arrival: USAID's previous experience with grantee organizations is that they are capable of making their own travel arrangements and obtaining passports and visas. Procedures will have to be established with the contractor for payment and pick-up of tickets. There have been occasions where participants have required assistance with obtaining visas. Procedures will be established with the Embassy and the Consulates General to streamline this procedure as much as possible. The principal work requirement for USAID will be to develop a standard information package and guidelines which can be routinely handed out to all participants. EOC already has established procedures for handling travel arrangements.

(6) Financial Support: The contractor's responsibility for short-term trainees is as critical as for long-term. Because of the shorter duration of training, financial support will require procedures different from those for academic participants. The contractor shall propose a financial support plan which takes into account the specific requirements of short-term trainees and minimizes the risk of failure.

(7) Debriefing: At the conclusion of training for each commonality group, the contractor shall set up procedures to ascertain whether the training has met the participants' needs, and what improvements they may suggest. The debriefing should also be the beginning of impact evaluation; the contractor should ensure that each participant has a clear plan to assess and report on the benefits accruing to his/her work as a result of the training.

C) Procedures Common to Both Long and Short Term Training

1) Management Information System: The contractor shall develop and maintain an extensive information file on academic and non-academic institutions for purposes of participant placement. This information system should include but not be limited to information on university enrollment requirements, tuition expenses, documents required for enrollment, English language requirement, services offered by the Foreign Student office, academic programs and courses for selected areas, and degree requirements. Furthermore, this file will also include information on short-term training opportunities with universities, technical training institutions, industries, consultancy firms and private sector facilities capable of providing practical or technical training in fields relevant to this project.

2) Communications: All communication with U.S. government agencies in the field, which is necessary to carry out the provisions of this contract, shall be through USAID/Pretoria, with information copies to AFR/PD/SA in Washington.

3) Operating Procedures: The contractor shall develop an Operations Manual incorporating procedures related to all of the above program elements, for both long-term and short-term training. The contents of the manual will be subject to approval by USAID/Pretoria. The operating procedures should describe how the contractor will effect staff adjustments relevant to a fluctuating participant case load.

4) Insurance: AID operates its own self-funded Health Accident Insurance (HAC) program in which all participants other than those under a host country contract must be enrolled in accordance with Handbook 10 (see also the clause of this document entitled "Health and Accident Coverage for AID Participant Trainees" [AIDAR 752.7018]). The contractor is required to register each participant in this plan upon his or her arrival in the U.S.

5) Reporting Requirements: The contractor will provide USAID/Pretoria with the following reports and information:

(a) Student selection (Long-term degree-oriented training) Student Selection Reports should be drafted by the contractor with input for EOC, and should include at least the following information:

-- Student name, sex, field, geographic origin, previous academic background and experience. Formats for both complete and summary version of these data, and any issues in this regard, should be included in the proposal.
-- Student placement, including the name of the college or university, how much the institution is contributing toward the student's expense, field of study, and confirmation of EOC and student concurrence with the choice of university and course of study.
-- A semi-annual report on all students from the time of their selection. USAID/Pretoria will advise the contractor regarding specific requirements and timing of these reports (which will match as completely as possible the Mission's semi-annual reporting requirements to AID/Washington). These will include but not be limited to information on each student re general status, progress, and expected return date; a summary sheet covering each year of the project; and analysis of trends over the years, backed up by appropriate data sheets.

(b) Short-term training reports
Short-term training will be more varied in nature than long-term study. The contractor should develop a reporting format which will reflect that variety while remaining compatible with other reporting protocols. The proposal should lay out clearly all formats and show how they can be compiled in summary form.

(c) Final Report
By the Estimated Completion Date of the contract, the contractor will submit a final report covering a general assessment of progress under the project, total number of participants trained, principal fields of study, trends over the years of the project, participant activities after completion of training, project successes and failures, and principal lessons learned. The proposal should amplify on the key issues that might be addressed in the final report.

(d) Information sharing with the EOC
All semi-annual reports and such others as may be found to be useful should be made available to EOC by the contractor as promptly as possible. The proposal should examine the feasibility of transmitting such reports by modem or diskette to minimize delay in sharing information. The technical review of proposals will take into account the likely success of involving EOC in information tracking and reporting and generally informing selected candidates of preparation for study in the United States. This process takes many months and will require close coordination between EOC and the U.S. contractor. Therefore, adequate time must be allowed between student selection and placement, with orientation period in between.

C. Management Duties of USAID, EOC and Contractor(s)

(1) The USAID/SA Staffing Situation-- The Mission presently has one direct-hire officer managing both the education and community development portfolios and serving as program officer. A second direct-hire officer has been approved to share the implementation and design workload in education. Some design and implementation responsibilites in Community Development have been assumed by a personal services contractor. The Mission is also interviewing candidates for a professional local hire position as project officer responsible for the internal and external bursary programs. A local-hire administrative assistant/secretary has been identified for the education and program offices. In addition, arrangements will be made for interim TDY assistance in education from AID/W.

(2) Overall Contractor Supervision--For at least the first year of the project, AFR/PD/SA, assisted by AFR/SA, will retain responsibility for day-to-day management of the U.S. contractor. Locating contractor management in AID/W rather than Pretoria makes sense for two reasons: first, the Mission is sufficiently weighed down with other demanding and time-consuming activities that to take on additional management responsibility at this time would be ill-advised. Second, there are a number of management-related tasks -- e.g., assistance to SER/OP in final contract negotiations, arrangements for contract start-up -- that can be more easily supervised by AID/W. The Mission, however, will have responsibility for determining the annual long-term student intake level and the OYB funding level to support each year's intake.

After a year of implementation under the amendment phase, the management situation will be reviewed again. If activities are on track and if the Mission's workload permits, it may be decided to shift contractor supervision responsbility to the field and possibly vouchering/contract management functions to Pretoria or Mbabane.

(3) Long-Term Component Workload--Management of the EOC component, because of proximity and contact, will be done by USAID/Pretoria. The Mission is currently taking steps to reduce the EOC management burden by providing assistance in streamlining and reorganizing EOC's financial, administrative and computer systems. This assistance, moreover, should also reduce USAID's work with the U.S. contractor as many of the issues raised often concern EOC's budget and record-keeping capabilities.

The revisions proposed on student selection/placement should also reduce the workload with the U.S. contractor. One of the principal substantive requirements of managing the U.S. contractors has been reconciling the number of students annually selected for training with available funding. Through the

revisions in the PP amendment, the contractor will be told the minimum student intake and financial ceiling before the selection process begins. Hence, USAID need only ensure that these constraints are satisfied before the contractor finalizes student placement.

(4) Short-Term Component Workload--The principal tasks in the short-term training component are trainee selection, placement, travel arrangements and support in the U.S. The workload requirement for USAID, EOC and the U.S. contractor under each of these tasks is discussed below.

(a) Trainee Selection--USAID participates in trainee selection solely under the general fund for private, community-based organizations. In this case, potential trainees are identified through the Mission's routine contacts with community organizations. Nominees are considered during the Mission's standard quarterly project review. Hence selection can be completed with minimal additional staff input.

Under "project buy-ins", the grantee organizations select the trainees. USAID need only incorporate a provision for training into the relevant grant agreements.

EOC will select trainees under the Career Development Program. Selection criteria are being established through consultation with community-based organizations and USAID/Pretoria. The program will be advertised principally through community groups in order to solicit applications from individuals likely to meet the selection criteria. This will also minimize EOC's travel requirements during the selection process as the community networks involved will be able to channel applications to Johannesburg. EOC's current computer facilities can handle the additional participant records. Once the computerized financial program is revamped as discussed in the project rationale, existing staff will be able to handle the additional workload.

(b) Trainee Placement--Trainee placement will be largely the contractor's responsibility. On both the general training fund and the project buy-ins, USAID will initiate the placement process with a letter to the contractor specifying the students to be trained and the desired area of study. To the extent possible, participants will be grouped into similar training requirements in order to minimize the placement burden on the contractor. For USAID, the workload would entail a quarterly letter to the contractor, and then follow up with the trainees to ensure their acceptance of the proposed program. The placement of participants financed through project buy-ins will be timed to coincide with the placement of trainees under the general fund to minimize additional work for both USAID and the contractor.

For all USAID-processed participants, the contractor will be asked to develop a computerized training resource library at the outset of the contract for the types of short-term courses specified in the project description. To do so, the contractor will canvass relevant training options in the United States and Southern Africa. These options will be provided to USAID for reference and put on the Mission's management information system, which may cut down on communications between USAID and the contractor. All proposals for short-term training sent to the Mission will be added to the resource library. It is expected that once the training program has run for one-two years, the types of courses on which participants are sent will become fairly standardized.

The contractor will also handle students selected by EOC for the Career Development Program. In practice, the contractor will serve as an agent for EOC to liaise with the universities which have joined the CDP. This has four advantages: (1) it will reduce the management burden on EOC by eliminating the need to coordinate with each member university; (2) it will reduce the administrative burden on USAID as our payments can be channelled through one contractor rather than to several universities or through a separate contract with EOC; (3) it will reduce the cost of communications between the U.S. and South Africa since negotiations with U.S. universities can be conducted by the contractor rather than EOC; (4) it will help maximize the number of participants since the contractor will be able to select universities which offer the best financial and training packages. This element of competition could not be generated from South Africa.

D. Calendar of Events for Project Amendment

Event	Date	Action by
ECPR review/approval of amendment	3/20/87	AFR Bureau
Issuance of RFP*	4/6/87	Contracts Off.
Authorization of project amendment	4/22/87	AA/AFR
Deadline for proposals	5/21/87	proposers
Proposals reviewed by panel	6/5/87	AID/W panel
Contract negotiation completed	6/12/87	Contracts Off.
Contract signed with successful proposers	6/19/87	AFR & Cont. Off
First group of short-term trainees depart for training	Nov 87	EOC & USAID/SA

Event	Date	Action by
Student networking (conference?)	Dec 87	Contractor
EOC selection process begins for 1989 student intake	Jan 88	EOC & Contractor
Evaluation of 83-87 phase	Apr 88	USAID/SA
1988 selection process completed	May 88	EOC & Contractor
Arrival of 1988 intake in U.S., orientation	Jul 88	Contractor
Annual cycles repeat	1989 1990 1991 1992	
Final group of new intakes begins long-term study	Jul 92	Contractor
Final evaluation of 1988-1992 phase	1992	USAID & external team
Final group completes course of study	Jun 96	
Project Completion (PACD)	Dec 96	

E. Evaluation Plan

With the establishment of a USAID mission in Pretoria in 1986, there is now a greater field capability to monitor this project than has been the case in the past. This will permit regular ongoing coordination with EOC, especially with respect to the short term trainees jointly selected under the new project component. USAID/Pretoria will be expected to undertake, with the cooperation of the Project Manager of the contractor, a semi-annual review of the status of the project as part of the Mission's Project Implementation Review process. This will provide an opportunity to identify rough spots, bottlenecks and ineffective practices as they arise so that they can be corrected for the balance of the project.

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* To save time, AFR/PD/SA plans to request AA/AFR approval to release the RFP immediately following the ECPR, assuming there are no major changes to the Project Paper Amendment and RFP document.

Since the current academic year is the final one for new intakes under the existing IIE and Aurora contracts (although the contracts provide for the continued support and monitoring of those students through the completion of their studies in 1991), a full external evaluation should be conducted for the 1983-1987 phase of the project early in 1988. This would encompass the long-term training element only, as the short-term component will still be too new to evaluate. The 1988 evaluation should be undertaken by an outside team comprising a professional training evaluator, a financial analyst and a project officer. Emphasis should be not only on the quality and relevance of the training, the academic performance of the students and the effectiveness of contractor support, but also on the uses to which the training is being put by students on their return to South Africa. The employment record of graduates should be examined carefully from both a quantitative and qualitative viewpoint, along with an assessment of the role of the organization(s) assisting in job placement. If it develops that greater emphasis needs to be placed on efforts aimed at assisting in the employment of graduates, in view of the greater numbers now completing their studies and the growing economic recession in South Africa, specific recommendations should be made at that time to strengthen this element.

A final evaluation should be conducted at an appropriate time in 1991 or 1992, combining contractor and USAID staff with outside consultants, after the final intake of students has entered training. Although the project will run for another four years to permit these students to complete, effectively the phase of the overall project supported by this amendment will be winding down, and enough graduates will have returned, many several years earlier, to permit an analysis in some depth of the results of the U.S. training in terms of employment, income, place in the community and other indicators of achievement. The exact timing aand focus of this evaluation will be determined in part on whether or not a follow-on external training project is contemplated. In any case, the the final evaluation should concentrate more on assessing the results of the training received, than on critiquing the process itself. The project budget contains funding for both external evaluations, as well as provisions for audit of the project.

PROJECT DESIGN SUMMARY
LOGICAL FRAMEWORK

NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
Goal: The goal of this project is to contribute to the process of preparing legally disadvantaged South Africans (blacks, Asians and so-called Coloreds) to participate at all levels of skill and responsibility in South Africa's industrialized economy and to prepare blacks for positions of leadership in a post-apartheid South Africa.	Participants in long and short-term training successfully complete their training and return to South Africa.	National S. African Education and Employment Statistics Records & Reports of EOC and other black S. African organizations Sociological studies by universities and private foundations	Education can promote peaceful change in S. Africa. Professional opportunities will continue to increase for black S. Africans. Continued political and social climate conducive to implementation of the project. EOC able to select appropriate candidates for training.

ANNEX A

PROJECT DESIGN SUMMARY
LOGICAL FRAMEWORK

NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
Purpose: The purpose of this project is to provide undergraduate and professional (graduate) training at accredited institutions of higher education in the United States for legally disadvantaged South Africans who are expected to return to South Africa upon completion of their studies. If eventually approved, short-term technical and management training for community-based black leaders and professionals will also be provided. This new project element, along with continued emphasis on long-term academic, especially graduate degree training, will seek to help implement the mandate of the U.S. Comprehensive Anti-Apartheid Act of 1986.	Returned graduates placed in appropriate professional positions in business, education, and community service. Short-term trainees better able to cope with community-based management problems and local black organizations strengthened.	Project evaluations Contractor reports on total number of students processed from recruitment to return to jobs in South Africa Student academic records reported by colleges and universities Records of private corporations providing scholarships.	Continued perceived need for training by legally disadvanted South Africans. Returning graduates will find jobs in S.A. appropriate to their field and level of training. Short-term training will assist black leaders in practical aspects of running community-based organizations.

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PROJECT DESIGN SUMMARY
LOGICAL FRAMEWORK

NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
Outputs:			
1. Long-term training - Approx. 931 disadvantaged South Africans trained in U.S. degree programs at both undergraduate and graduate levels, mainly in engineering, education, business administration/ accounting/finance, chemistry/biology /pharmacy, computer science, and a variety of related professional fields.	Long-term Student Intake by Year 1982 83 84 85 86 87 86 79 88 99 114 75 1988 89 90 91 92 Total 78 78 78 78 78 931	Contractor semi-annual and and annual reports EOC records provided through U.S. contractor. EOC/Contractor reporting data from program alumni association. AID evaluations undertaken by USAID/SA and external teams.	Students complete studies successfully and return to S.A. EOC's capacity to assume more responsibility will increase with time, experience and continued funding.
2. Short-term training - Approx. 222 individuals primarily from black community-based organizations trained in a variety of technical and management fields through short-courses in the U.S. and third world countries.	Short-term tra serve three se a. practical t of black NGOs. b. buy-ins by projects to pr training to en effectiveness. c. assist EOC Development Pr		
3. Institutions Strengthening of EOC: The EOC is better able to function as an effective black institution in S. Africa as a result of funding, training and management assistance, including computer hardware and software, furnished under this project. Assistance provided to the EOC's Career Development Program would further enhance the capability, prestige and influence of the EOC within the black community, as well as its bargaining position with the S. African Government.	Greater influe education poli Growth in netw graduates in J		

PROJECT DESIGN SUMMARY
LOGICAL FRAMEWORK

NARRATIVE SUMMARY		OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
Inputs:				
(Amendment only)		Funded by Amendment		
			AID and contractor records	Participating colleges and universities will continue to provide tuition waivers to students
Long-term training	$19,500,000	390 students for degree training averaging 3 years @ 17,000 p/yr; total funding $19.5 million, plus inflation.	Evaluations Audits	Part of the demand for external scholarships will continue to be absorbed by contributions from private U.S. corporations.
EOC sub-contract	1,362,000			
Evaluation/Audit	80,000			
Inflation/Contingency	1,658,000			
Total	$22,600,000			

ANNEX B

INITIAL ENVIRONMENTAL EXAMINATION

OR

CATEGORICAL EXCLUSION

Country:	South Africa
Project Title:	Training for Disadvantaged South Africans (690-0213)
Funding:	FY87: $5.2 million (ESF) LOP: $54.0 million (ESF/DA)
Categorical Exclusion Prepared by:	AFR/PD/SA, Mary Ann Riegelmar

This is an amendment to an ongoing training project begun in 1982, which extends the project by five years and adds $20 million in LOP funding. The project consists almost entirely of long-term academic training in the United States at the undergraduate and graduate levels and a relatively small amount of short-term training in the U.S. and in Third World (Code 941) countries. The only project activities in South Africa is a small sub-contract with the Educational Opportunities Council (EOC) to provide for the identification, selection and processing of students. Accordingly, the project meets the criteria for a categorical exclusion in accordance with section 216.2(c)(2)(i) of AID Regulation 16, inasmuch as the project will finance exclusively such activities as higher education, technical training and leadership training.

APPROVED X B. Boyd
Bureau Environmental Officer
Bessie L. Boyd, AFR/TR/PRO

DISAPPROVED _____

DATE MAR 13 1987

Clearance: GC/AFR _____ Date _____

Drafted: AFR/PD/SA, MG #3166L

STATUTORY CHECKLIST

5C(2) PROJECT CHECKLIST

Listed below are statutory criteria applicable to projects. This section is divided into two parts. Part A. includes criteria applicable to all projects. Part B. applies to projects funded from specific sources only: B.1. applies to all projects funded with Development Assistance loans, and B.3. applies to projects funded from ESF.

CROSS REFERENCES: IS COUNTRY CHECKLIST UP TO DATE? HAS STANDARD ITEM CHECKLIST BEEN REVIEWED FOR THIS PROJECT?

A. GENERAL CRITERIA FOR PROJECT

1. FY 1986 Continuing Resolution Sec. 524; FAA Sec. 634A.

   Describe how authorizing and appropriations committees of Senate and House have been or will be notified concerning the project.

   Congressional Notification was submitted on April 20, 1987, and 15 day waiting period expired without obligation on May 5.

2. FAA Sec. 611(a)(1). Prior to obligation in excess of $500,000, will there be (a) engineering, financial or other plans necessary to carry out the assistance and (b) a reasonably firm estimte of the cost to the U.S. of the assistance?

   Yes

3. FAA Sec. 611(a)(2). If further legislative action is required within recipient country, what is basis for reasonable expectation that such action will be completed in time to permit orderly accomplishment of purpose of the assistance?

   N/A

4.	FAA Sec. 611(b); FY 1986 Continuing Resolution Sec. 501. If for water or water-related land resource construction, has project met the principles, standards, and procedures established pursuant to the Water Resources Planning Act (42 U.S.C. 1962, et seq.)? (See AID Handbook 3 for new guidelines.)	N/A
5	FAA Sec. 611(e). If project is capital assistance (e.g., construction), and all U.S. assistance for it will exceed $1 million, has Mission Director certified and Regional Assistant Administrator taken into consideration the country's capability effectively to maintain and utilize the project?	N/A
6.	FAA Sec. 209. Is project susceptible to execution as part of regional or multilateral project? If so, why is project not so executed? Information and conclusion whether assistance will encourage regional development programs.	NO
7.	FAA Sec. 601(a). Information and conclusions whether projects will encourage efforts of the country to: (a) increase the flow of international trade; (b) foster private initiative and competition; and (c) encourage development and use of cooperatives, and credit unions, and savings and loan associations; (d) discourage monopolistic practices; (e) improve technical efficiency of industry, agriculture and commerce; and (f) strengthen free labor unions.	Graduates of this training can be expected to make a positive contribution to items b, e and f.

8. FAA Sec. 601(b). Information and conclusions on how project will encourage U.S. private trade and investment abroad and encourage private U.S. participation in foreign assistance programs (including use of private trade channels and the services of U.S. private enterprise).	Extensive involvement of U.S. colleges and universities.
9. FAA Sec. 612(b), 636(h); FY 1986 Continuing Resolution Sec. 507. Describe steps taken to assure that, to the maximum extent possible, the country is contributing local currencies to meet the cost of contractual and other services, and foreign currencies owned by the U.S. are utilized in lieu of dollars.	There is no involvement in this project by the South African government, and no U.S.-owned local currency
10. FAA Sec. 612(d). Does the U.S. own excess foreign currency of the country and, if so, what arrangements have been made for its release?	No.
11. FAA Sec. 601(e). Will the project utilize competitive selection procedures for the awarding of contracts, except where applicable procurement rules allow otherwise?	Yes.
12. FY 1986 Continuing Resolution Sec. 522. If assistance is for the production of any commodity for export, is the commodity likely to be in surplus on world markets at the time the resulting productive capacity becomes operative, and is such assistance likely to cause substantial injury to U.S. producers of the same, similar or competing commodity?	N/A

13. FAA 118(c) and (d). Does the project comply with the environomental procedures set forth in AID Regulation 16. Does the project or program take into consideration the problem of the destruction of tropical forests?	A categorical exclusion has been approved.
14. FAA 121(d). If a Sahel project, has a determination been made that the host government has an adequate sysem for accounting for and controlling receipt and expenditure of project funds (dollars or local currency generated therefrom)?	N/A
15. FY 1986 Continuing Resolution Sec. 533. Is disbursement of the assistance conditioned solely on the basis of the policies of any multilateral institution?	No.
16. ISDCA of 1985 Sec. 310. For development assistance projects, how much of the funds will be available only for activities of economically and socially disadvantaged enterprises, historically black colleges and universities, and private and voluntary organizations which are controlled by individuals who are black Americans, Hispanic Americans, or Native Americans, or who are economically or socially disadvantaged (including women)?	Prime contractor will be encouraged to sub-contract with Gray Amendment entities. Wide use is made of HBCUs in placing students in U.S. institutions.

B. FUNDING CRITERIA FOR PROJECT

1. Development Assistance Project Criteria

a. FAA Sec. 102(a), 111, 113, 281(a). Extent to which activity will (a) effectively involve the poor in development, by extending access to economy at local level, increasing labor-intensive production and the use of appropriate technology, spreading investment out from cities to small towns and rural areas, and insuring wide participation of the poor in the benefits of development on a sustained basis, using the appropriate U.S. institutions; (b) help develop cooperatives, especially by technical assistance, to assist rural and urban poor to help themselves toward better life, and otherwise encourage democratic private and local governmental institutions; (c) support the self-help efforts of developing countries; (d) promote the participation of women in the national economies of developing countries and the improvement of women's status, (e) utilize and encourage regional cooperation by developing countries?

a. project is aimed at socially and economically disadvantaged South Africans.

b. no direct assistance to cooperatives is provided.

c. there is no host government in the project.

d. women are recruited and selected for training under the project.

e. regional training institutions will be utilized for short-term training to extent feasible.

b.	FAA Sec. 103, 103A, 104, 105, 106. Does the project fit the criteria for the type of funds (functional account) being used?	YES
c.	FAA Sec. 107. Is emphasis on use of appropriate technology (relatively smaller, cost-saving, labor-using technologies that are generally most appropriate for the small farms, small businesses, and small incomes of the poor)?	N/A
d.	FAA Sec. 110(a). Will the recipient country provide at least 25% of the costs of the program, project, or activity with respect to whch the assistance is to be furnished (or is the latter cost-sharing requirement being waived for a "relatively least developed country)?	There is no host government in project
e.	FAA Sec. 122(b). Does the activity give reasonable promise of contributing to the development of economic resources, or to the increase of productive capacities and self-sustaining economic growth?	Yes, project seeks to assist legally disadvantaged South Africans.

f. FAA Sec. 128(b). If the activity attempts to increase the institutional capabilities of private organizations or the government of the country, or if it attempts to stimulate scientific and technological research, has it been designed and will it be monitored to ensure that the ultimate beneficiaries are the poor majority?	Individuals, not host country institutions are the direct beneficiaries of the project.
g. FAA Sec. 281(b). Describe extent to which program recognizes the particular needs, desires, and capacities of the people of the country; utilizes the country's intellectual resources to encourage institutional development; and supports civil education and training in skills required for effective participation in governmental processes essential to self-government.	Entire project is based on providing education and training to poor majority.

2. Development Assistance Project Criteria (Loans Only)

a. FAA Sec. 122(b). Information an conclusion on capacity of the country to repay the loan, at a reasonable rate of interest.	N/A
b. FAA Sec. 620(d). If assistance is for any productive enterprise which will compete with U.S. enterprises, is there an agreement by the recipient country to prevent export to the U.S. of more than 20% of the enterprise's annual production during the life of the loan?	N/A

3. Economic Support Fund Project Criteria

a. FAA Sec. 531(a). Will this assistance promote economic and political stability? To the maximum extent feasible, is this assistance consistent with the policy directions, purposes, and programs of part I of the FAA?	Project aims at promoting economic and political stability in post-apartheid South Africa.
b. FAA Sec. 531(c). Will assistance under this chapter be used for military, or paramilitary activities?	NO
c. ISDCA of 1985 Sec. 207. Will ESF funds be used to finance the construction of, or the operation or maintenance of, or the supplying of fuel for, a nuclear facility? If so, has the President certified	NO

	that such country is a party to the Treaty on the Non-Proliferation of Nuclear Weapons or the Treaty for the Prohibition of Nuclear Weapons in Latin America (the "Treaty of Tlatelolco"), cooperates fully with the IAEA, and pursues nonproliferation policies consistent with those of the United States?	
d.	FAA Sec. 609. If commodities are to be granted so that sale proceeds will accrue to the recipient country, have Special Account (counterpart) arrangements been made?	N/A

5C(3) - STANDARD ITEM CHECKLIST

Listed below are the statutory items which normally will be covered routinely in those provisions of an assistance agreement dealing with its implementation, or covered in the agreement by imposing limits on certain uses of funds.

These items are arranged under the general headings of (A) Procurement, (B) Construction, and (C) Other Restrictions.

A. Procurement

1.	FAA Sec. 602. Are there arrangements to permit U.S. small business to participate equitably in the furnishing of commodities and services financed?	YES
2.	FAA Sec. 604(a). Will all procurement be from the U.S. except as otherwise determined by the President or under delegation from him??	YES
3.	FAA Sec. 604(d). If the cooperating country discriminates against marine insurance companies authorized to do business in the U.S., will commodities be insured in the United States against marine risk with such a company?	Commodities are not being financed.
4.	FAA Sec. 604(e); ISDCA of 1980 Sec. 705(a). If offshore procurement of agricultural commodity or product is to be financed, is there provision against such procurement when the domestic price of such commodity is less than parity? (Exception where commodity financed could not reasonably be procured in U.S.)	N/A

5.	FAA Sec. 604(g). Will construction or engineering services be procured from firms of countries which receive direct economic assistance under the FAA and which are otherwise eligible under Code 941, but which have attained a competitive capability in international markets in one of these areas? Do these countries permit United States firms to compete for construction or engineering services financed from assistance programs of these countries?	N/A
6.	FAA Sec. 603. Is the shipping excluded from compliance with requirement in section 901(b) of the Merchant Marine Act of 1936, as amended, that at least 50 per centum of the gross tonnage of commodities (computed separately for dry bulk carriers, dry cargo liners, and tankers) financed shall be transported on privately owned U.S. flag commercial vessels to the extent such vessels are available at fair and reasonable rates?	Commodities are not being financed.
7.	FAA Sec. 621. If technical assistance is financed, will such assistance be furnished by private enterprise on a contract basis to the fullest extent practicable? If the facilities of other Federal agencies will be utilized, are they particularly suitable, not competitive with private enterprise, and made available without undue interference with domestic programs?	YES

8. International Air Transportation Fair Competitive Practices Act, 1974. If air transportation of persons or property is financed on grant basis, will U.S. carriers be used to the extent such service is available? — YES

9. FY 1986 Continuing Resolution Sec. 504. If the U.S. Government is a party to a contract for procurement, does the contract contain a provision authorizing termination of such contract for the convenience of the United States? — YES

C' nstruction

1. FAA Sec. 601(d). If capital (e.g., construction) project, will U.S. engineering and professional services be used? — N/A

2. FAA Sec. 611(c). If contracts for construction are to be financed, will they be let on a competitive basis to maximum extent practicable? — N/A

3. FAA Sec. 620(k). If for construction of productive enterprise, will aggregate value of assistance to be furnished by the U.S. not exceed $100 million (except for productive enterprises in Egypt that were described in the CP)? — N/A

C. Other Restrictions

1. FAA Sec. 122(b). If development loan, is interest rate at least 2% per annum during grace period and at least 3% per annum thereafter?	N/A
2. FAA Sec. 301(d). If fund is established solely by U.S. contributions and administered by an international organization, does Comptroller General have audit rights?	N/A
3. FAA Sec. 620(h). Do arrangements exist to insure that United States foreign aid is not used in a manner which, contrary to the best interests of the United States, promotes or assists the foreign aid projects or activities of the Communist-bloc countries?	YES
4. Will arrangements preclude use of financing:	
a. FAA Sec. 104(f); FY 1986 Continuing Resolution Sec. 526. (1) To pay for performance of abortions as a method of family planning or to motivate or coerce persons to practice abortions; (2) to pay for performance of involuntary sterilization as method of family planning, or to coerce or provide financial incentive to any person to undergo	(1) Yes (2) Yes

	sterilization; (3) to pay for any biomedical research which relates, in whole or part, to methods or the performance of abortions or involuntary sterilizations as a means of family planning; (4) to lobby for abortion?	(3) Yes (4) Yes
b.	FAA Sec. 488. To reimburse persons, in the form of cash payments, whose illicit drug crops are eradicated?	YES
c.	FAA Sec. 620(g). To compensate owners for expropriated nationalized property?	YES
d.	FAA Sec. 660. To provide training or advice or provide any financial support for police, prisons, or other law enforcement forces, except for narcotics programs?	YES
e.	FAA Sec. 662. For CIA activities?	YES
f.	FAA Sec. 636(i). For purchase, sale, long-term lease, exchange or guaranty of the sale of motor vehicles manufactured outside U.S., unless a waiver is obtained?	YES

g.	FY 1986 Continuing Resolution, Sec. 503. To pay pensions, annuities, retirement pay, or adjusted service compensation for military personnel?	YES
h.	FY 1986 Continuing Resolution, Sec. 505. To pay U.N. assessments, arrearages or dues?	YES
i.	FY 1986 Continuing Resolution, Sec. 506. To carry out provisions of FAA section 209(d) (Transfer of FAA funds to multilateral organizations for lending)?	YES
j.	FY 1986 Continuing Resolution, Sec. 510. To finance the export of nuclear equipment, fuel, or technology?	YES
k.	FY 1986 Continuing Resolution, Sec. 511. For the purpose of aiding the efforts of the government of such country to repress the legitimate rights of the population of such country contrary to the Universal Declaration of Human Rights?	YES
l.	FY 1986 Continuing Resolution, Sec. 516. To be used for publicity or propaganda purposes within U.S. not authorized by Congress?	YES

INSTITUTIONAL ANALYSIS OF THE EDUCATIONAL OPPORTUNITIES COUNCIL

1. Origins and Objectives

EOC was formed following the 1976 student unrest in protest of the inferior "bantu" education offered to black South Africans and the lack of educational opportunity they suffered. The institutionalized inferiority of black education was seen as inextricably linked with the socio-economic status of black South Africans and the means by which they were denied the opportunity to change the status quo. As such, it was recognised as an integral part of the apartheid system.

In response to this recognition, various attempts were made to redress some of the inequities of the South African government system by attempting to go outside of it to provide educational opportunities. One such attempt was the placement of students in universities outside of South Africa, which was how the South Africa Education Program (SAEP) was begun. E.O.C. was involved in such attempts, and was concerned with S.A.E.P from its inception.

At its outset E.O.C's aims were to:

(1) coordinate efforts on the part of organizations and individuals involved in black education and development, and to liaise with such organizations;

(2) assess the educational needs of black people in South Africa;

(3) assist in the development of black-based (but non-racial) organizations in the field of education and training;

(4) promote programs of non-formal compensatory education at primary, secondary and tertiary levels;

(5) direct students to further study in the USA, Western Europe, South Africa and other countries;

(6) encourage South Africans who have been educated outside South Africa to return home to provide the needed leadership for the education, training and development of their fellow South Africans;

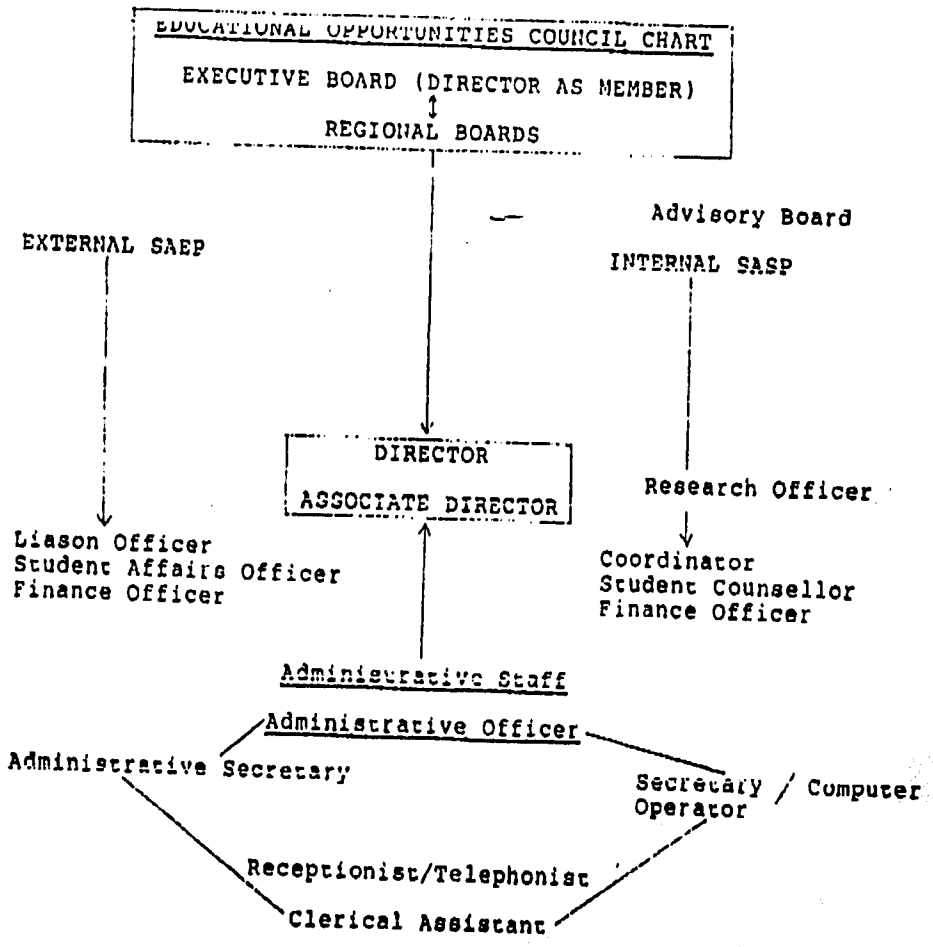
(7) work for a just allocation of resources and equitable educational opportunities for all South Africans.

From its inception, however, E.O.C. suffered from a lack of resources to accomplish these aims fully or to invest in an administrative structure commensurate with its goals. Initially, funding for students was supplied by US universities, foundations and corporations, and there was little money to build E.O.C's institutional capabilities. The number of students funded increased dramatically when AID joined the funding program -- the numbers rose from 35 in 1981 to 108 in 1984. The organization's responsibilities expanded further in 1986 with the addition of 36 internal bursaries financed by AID. In 1987, the number of internal bursaries has increased to well over 300, with AID funding an additional 138.

Still, however, E.O.C is a very small organization. Although staff numbers have increased to the present staffing level of 13, this is still barely sufficient to meet the needs of such a rapidly expanding operation.

2. Organization and Management

EOC is organized according to the following chart (not all positions are currently filled):



One of the greatest assets of the EOC structure is the access given to prominent educationalists and community leaders through its National Executive Board and its Regional Boards of Directors. The Executive Board, which meets each trimester, has 12 nationally recognized members, including Archbishop Desmond Tutu who is the chairperson (a list of members is provided in Attachment 1). The Board's principal functions are to determine policy on both the external and internal scholarship programs, and to oversee EOC's operations. Of particular concern to the Board are EOC's selection procedures, the geographic representation of trainees, and community reactions to EOC's practices. As key leaders in the black community, each board member is changed with soliciting community views before attending board meetings. These views are candidly presented to EOC staff and, when necesarry, provide the basis for reformulating organizational policy.

The Regional Boards play a major role in assisting the Executive Board and EOC to solicit community opinions and maintain grassroots credibility. Presently, there are Regional Boards in Natal, the Eastern Cape, Western Cape, Bloemfontein and the Transvaal. Each board has eight members, with one member from each region represented on the National Executive. Although the Regional Boards do not presently have permanent offices due to lack of funds, the members are prominent members of the community who keep abreast of popular sentiment over EOC's scholarship programs. Each Regional Board meets twice a quarter. The results of these meetings are reported immediately to EOC's office in Johannesburg, as well as at the Executive Board meetings.

EOC also benefits from the technical advice of an Advisory Board established with AID assistance to provide guidance to AID's contractors on the South Africa Scholarship Program (internal bursaries). While some issues reviewed by the Advisory Board pertain exclusively to internal scholarships, such as counselling black students attending South Africa's white or open universities, other issues apply to university training generally. Two such topics, discussed later in this analysis, are training priorities for a post-apartheid South Africa and job placement for black university graduates. Overall, the Advisory Board provides a forum for South African educators to both discuss pressing topics in their field and formulate visions and ideas into action-oriented plans. As the Advisory Board's capabilities grow, this forum will increasingly benefit practioners in education and donors alike.

3. EOC Responsibilities and Functions

EOC's involvement in the external scholarship program is mainly in recruitment, selection and preparation of candidates for study in the U.S. This involves a considerable logistical operation of advertising, sending out publicity to a variety of institutions, personal recruitment campaigns, and generally ensuring the maximum publicity throughout the country.

On a student's initial indication of interest, EOC sends out application forms which are carefully screened once they have been returned. Presently, all students must apply to EOC's Johannesburg office as regional offices still have not been established. Interviews, which are conducted in various regions, follow the initial screening procedure. The number of interview areas is determined by the number of applicants from different regions -- consequently, as demand has grown the number of regional interview centers has also grown. Interviews are conducted by two EOC staff persons, two American representatives and four regional panelists appointed by EOC regional boards. Recommended students are then reviewed by the National Selection panel which is comprised of EOC staff, regional panel members and representatives of IIE and Aurora Associates.

After selection, EOC advises candidates on how to prepare for necessary tests such as TOEFL, SAT, etc., and ensures that trainees complete all relevant documentation. This often involves considerable staff work, as candidates are frequently unfamiliar with U.S. procedures and regulations.

Once AID's U.S. contractors secure placement in U.S. universities, EOC passes on the information to the students, advises students on how to apply for a passport and accept the placement offer, and embarks on regional orientation courses. Often, due to time delays and inexperience on the behalf of candidates, EOC has to try to facilitate the timely departure of students, which places an additional work burden on its staff.

EOC's involvement in the internal scholarship program is more extensive than their involvement in the external scholarship program. In addition to recruiting and selecting the candidates for study at S.A. universities, EOC is also responsible for student counselling, monitoring and financial management for the SASP program.

Although EOC only participated in the actual placement of 350 AID-financed students in the external program to 1986, it dealt with some 2,600 applications from 1984 - 86. Additionally, EOC processed over 4000 applicants to select approximately 400 students for the internal program in 1985 - 86. These figures give some indication of the extent of the operation which EOC has undertaken, and the fact that it has managed to accomplish such a task given its initial inexperience and staff shortages is in itself noteworthy.

Unfortunately, the whole process of selecting candidates for the SAEP and SASP programs, ensuring the timely departures of the SAEP candidates and handling the finances of the SASP candidates has taken up so much time and funding that there has been little left to devote to the streamlining of operations within EOC internally. EOC, however is very aware of this concern and hopes to address it by improving its data collection and management system.

Concern has also been expressed over the selection process employed by EOC, especially regarding possible geographic and political favoritism. However, there is little concrete evidence to indicate that this is the case, and it would appear that selections have been unbiased and that the geographic breakdown of trainees reflects domestic population concentrations. This issue, and whether the percentage of female trainees parallels the percentage of women eligible for university training have been raised with EOC and are being addressed by its Research Unit. In response to concerns about sufficiently reaching a variety of geographic locales, moreover, EOC established regional interview centers in Durban, Alice, Cape Town, Pietersburg, Mafikeng, Johannesburg, and Bloemfontein. EOC is also exploring alternative advertising mechanisms which can reach all parts of the country, particularly rural areas, in order to ensure the broadest possible geographic coverage. Inevitably, EOC's selection procedures will still be subject to scrutiny and criticism given the political realities of South African education, but the actual distribution of trainees and the links EOC has established to communities through its interview centers and boards strongly affirm the fairness of its policies.

4. <u>Selection Criteria for SAEP</u>

Student selection is based on applications which respond to AID's agreed upon funded fields of study, academic background and potential, financial need, English language ability, and the students' intention to return to South Africa and make a contribution to the community. There is no discrimination in terms of race (i.e. between Black, coloured or Asian populations), religion, sex, place of origin or political affilication. The selection criteria employed for all university training is currently under scrutiny by the Advisory Board in an attempt to systematize the evaluation of students, and to objectify the process.

Priority is given to study in economics, business administration, public administration, engineering, agriculture, and the natural sciences. This is in accordance with AID's agreement with the U.S. contractor. In 1986, undergraduate trainees entered in the fields of business/commerce/economics (27%); engineering (26%); biology/chemistry/physics (17%); computer science/math (13%); and medical-related subjects (9%). The remaining 8% of students entered a variety of subjects within the permitted fields. At graduate level, education-related subjects took 36%; medical-related fields 26%; economics/marketing, sociology and the hard sciences each accounted for 8 % and the remainder entered in law, urban planning, geography, African studies and architectural theory.

Concerns have been raised as to the choice of subjects for funding, and the definition of priority areas. The issue centers on: a) how far these areas are indicative of the present needs and concerns expressed by black individuals and communities and b) how far the subject areas address the potential needs of a post-apartheid South Africa. Black educationalists and political leaders are currently debating these issues in general terms, and their opinions will affect any future decisions to change AID-funded fields of study. EOC is involved in these debates as a black educational institution. It also hopes to have input through it research facility which will, amongst other things, document black opinion and analyze issues and suggest strategies for progress towards a post-apartheid South Africa.

Job Placement for returning SAEP students

To date, EOC has provided only limited job placement support, for both political and practical reasons. Practically, students have not had major difficulties securing jobs upon their return to South Africa. IIE surveyed all graduates from its AID and corporate program in the autumn of 1986, and in November reported that: "despite the economic situation in South Africa, the SAEP alumni who have returned to South Africa seem to find appropriate and generally satisfying jobs in South Africa. With increasing white emigration, professional jobs are opening for blacks and SAEP alumni are in a position to take advantage of these opportunities."

In this context, EOC has found it adequate to forward the resumes of students who so desire to employment agencies in South Africa. In addition, IIE and Aurora circulate a periodic recruitment roster to potential South African employers. IIE and Aurora encourage participants to submit up-to-date resumes for the rosters well in advance of when they expect to be on the job market, to minimize long-term unemployment after graduation.

Politically, more extensive assistance with job placement from EOC may not be possible in the present climate, because of the adverse reaction it could occasion. Presently education is a very sensitive and important issue and the debate has in part centered on how assistance could best be offered in the education field. While tertiary education is the aim of many South African blacks, and is seen by most of them as necessary to provide future leaders and administrators in a post-apartheid South Africa, and to improve the quality of services offered to black communities, the issue has been complicated by other socio-political factors. Since a small percentage of blacks obtain the necessary qualifications for university training under apartheid education, there have been accusations of elitism in concentrating on tertiary education. Furthermore, some persons have expressed concern that tertiary education is creating a black middle class and thus diffusing the struggle for change. Thus far, the arguments for degree and post graduate training have matched any criticism of them, but the issue remains a point of contention within the education debate.

Of greater direct consequence is the possibility of EOC's assistance in job placement for returning grantees. It is felt quite strongly by communities that the grantees have been given a considerable opportunity to study in the U.S. While people do not wish to deny them this opportunity, concern has been expressed that to futher assist them on their return with employment opportunities would be providing them with undue assistance over their contemporaries, who have not been recipients of such an opportunity. Adequate employment prospects of qualified Black people is an area of concern to all Black persons and is therefore a very sensitive issue to address. The Advisory Board for the internal scholarship program will be analyzing this issue systematically early in 1987. However, should EOC play too prominent and formalized a role in assistance to returnees it could be damaging its credibility within communities, and thus to the community support it enjoys.

On the other hand, EOC is aware that some follow up of returned students is necessary, both for information purposes and also to provide a more complete service to its students. Consequently, this is one area which it intends to address under its recently formed research facility, concentrating particularly on readjustment of students on their return to South Africa, and their employment possibilities.

6. Management Concerns

Due to the fact that EOC's operation has grown remarkably in a very short time, its managerial systems have not expanded as rapidly as either the volume of money it handles or the range of activities it is involved in. It seems likely that at its inception no clear managerial structure was defined, and whilst it functioned reasonably well in a somewhat ad hoc manner when a small number of projects were involved, it ceased to function as well when the work load increased dramatically. As a result tasks have tended to be done without a formal strategy and EOC has been unable to produce the sort of informative reports the wealth of data it has amassed would suggest are possible.

Overall, EOC is at a critical stage in developing its institutional capabilities. Until 1986, EOC exclusively handled external scholarship programs. While these required extensive administrative and financial control for student selection, EOC did not have responsibility for student placement, counselling, monitoring and financial support. In 1986, EOC initiated an internal scholarship program with AID funding. The program began with 38 students, which did not impose a major additional burden. However, it has grown quickly with AID and other donor funding to over 300 students in 1987. EOC is aware that it must streamline its operations, relying particularly on the use of computers, in order to handle this added work load effectively.

EOC took the initiative to upgrade its capabilities by recently hiring a full time accountant and contracting with a major accounting firm to design a computer-based management information and financial system. The contractor helped EOC establish a complete data base on its students in South Africa, but the software package proved cumbersome, did not integrate student and financial records, and was not accompanied by adequate training materials. Hence, all financial and student records are still kept manually.

To help identify specific technical problems with the computer system, USAID/Pretoria financed a consultancy by a computer specialist in February 1987. In a short time, the consultant identified the principal programming problems, was able to correct some problems with minor modifications, trained EOC staff in simple data base manipulations, and identified additional training requirements. With just this preliminary assistance, EOC staff have found that they can quickly produce student reports, using the existing data base, which previously took days or weeks. Integration of student and financial records will require additional assistance.

EOC and USAID have reviewed the recommendations of this consultancy and have contracted with the Academy for Educational Development to address pending needs. This consultancy will be financed through the PM and R account. While the Internal Bursary program most urgently requires computerized recording keeping and finances, the existing computer hardware is adequate to also handle the records of students on U.S. training. With proper coordination between EOC and the U.S. contractor, EOC should then be able to maintain complete student records from selection through job placement. Clearly, this will also assist in strengthening alumni/ae and professional networks which could exert pressure on employers to accelerate hiring of black professionals.

7. Needs and Recommendations

In order that EOC can usefully respond to the demands placed upon it by its present portfolio of bursaries, let alone its increased bursary responsibilities and additional functions such as a research department, it must streamline its logistical procedures to allow staff to fulfull their duties efficiently. This is not a monumental task if addressed at the present juncture. A clearly defined organizational chart with staff responsibilities and chains of interaction would help enormously. If operations were divided systematically into sections which interfaced with one another on a regular basis some of the duplication of effort and inability to access information quickly would be overcome. If the kind of information and reporting required is clearly delineated, the appropriate mechanisms for collecting and aggregating the data could be established without too much difficulty. These managerial modifications would also permit EOC to operate more cost effectively and reduce the burden presently placed on staff, all of whom have considerable levels of skills and competancy but who are operating under very difficult conditions. The managerial infrastructural problems in no way reflect EOC management's lack of technical ability, but are a result of EOC being an innovative black institution in a country where black persons have not been permitted to learn managerial and organisational skills commensurate with their ability and technical expertise.

Unfortunately, if EOC's problems are not in some way addressed at this juncture, they are likely to escalate disproportionately to the increased demands placed upon the organization. It would be a tragedy if EOC staff and management found themselves unable to cope with increased operational responsibilities from a purely logistical standpoint and thus talented individuals found it necessary to leave the organization because the day-to-day functional problems became too great, or that the necessary accounting and information collection facilities became so backlogged that the institution could suffer from an external audit. If EOC in any way were made to lose credibility because of structural organisational problems, a great disservice would have been done to both the individuals concerned and to the endeavor which is representative of black aspirations.

It is suggested that donors respond to the issues facing EOC by matching increased responsibilities with increased aid to help improve the operational functioning of the organization. Many of the pressing organizational, management and financial needs are being addressed through the consultancies AID is presently financing to improve computer and financial systems. In so doing, there have been many spinoff benefits in improved organizational design and procedures. By so doing, AID and other donors who provide such assistance are helping to build an infrastructure, which is essentially fulfilling a political and developmental goal -- it is institution building within the black community. Such a broadened goal would contribute to the ability of Black people to ably govern a post-apartheid South Africa every bit as much as training increased numbers of people in technical skills, or researching some of the detrimental effects of apartheid.

3. Rationale for Additional Assistance to EOC

There are distinct advantages to using EOC -- it is a black led institution, it is staffed by black professionals, it is the only such institution in South Africa. Other organizations, such as SACHED, the Council for Black Education and Research and the University Preparation Program, perform different functions. Through its staff, directors, regional committee members and relations with other black organizations, EOC operates an extensive network of linkages with both black political leaders and black communities. Indeed, many key figures are members of one of the other of its boards of directors, and it enjoys good relations with a variety of other notable organizations. Many of those who comprise EOC's regional boards also occupy prominent positions in the communities and educational institutions.

Because of these factors, EOC can be assumed to have support from the black community and also to be responsive to issues voiced by the black community. Furthermore, EOC has attempted, and is continuing to attempt, to overcome some of its institutional problems, and it is likely that once the accounting and computing facility are strengthened, its operations will be able to be more efficiently and effectively undertaken. It is not possible at the present time to use another black organization -- there is not one in existence. To create another organization would be to probably replicate many of the problems faced by EOC, for they are a result of the apartheid system. South African blacks generally lack the managerial experience required to effectively run organizations initially because they have been denied the opportunity to learn managerial skills. Additionally the effective persuance of separate development policies have denied them the chance to fully observe and learn by participation in functioning organizations. More developmentally sound would be to focus on EOC's problems and effectively build an institution which could not only usefully pursue its goals, but which could serve as a role model and training facility for future similar organizations.

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