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INTRODUCTION

This year's conference of AID and cooperating agencies in the field of population focused on two major topics: The AID resource allocation plan and the reports of three task forces.

This report summarizes key points made at the 1984 conference. For those wishing to hear tapes of the meetings, a cassette copy is available by calling or writing the AID Population Office (The Family Planning Services Div.) at (703) 235-9677.

Oral reports of each task force were based on written reports which are available to the readers. In order to keep these proceedings as brief as possible, only summaries of the conference proceedings are provided. For amplification of the presentations, please refer to the task force reports.

OPENING REMARKS
DR. STEVEN W. SINDING, DIRECTOR
OFFICE OF POPULATION

I. REFLECTIONS ON AFRICA

Dr. Sinding recently visited several African countries and noted a number of significant changes concerning population matters:

There is considerable change toward more favorable attitudes regarding population and family planning. Africa is ready to move and the decision to allocate more resources to Africa is sound. Moreover, there now appears to be the absorptive capacity to utilize these resources.

- In Nigeria there is more opportunity for progress in population programs than AID can respond to. The country may need a bilateral agreement.

- Kenya manifests a strong political commitment and seriousness about family planning services. There is an alternate health care infrastructure and the capacity for an effective and immediate response from the country.

- The World Health Organization is encouraged about the new opportunities and is interested in collaborating with AID. Dr. Sinding indicated that he would like to follow up with many of the cooperating agencies regarding the above opportunities

II. THE BUDGET.

- There is the possibility that Congress will appropriate $290 million for the population program, which is $40 million more than the administration requested. This provides an enormous opportunity but also a challenge to use those additional funds productively.

- Half of the $40 million increase from Congress will go to the UNFPA and $19 million and the remaining $20 million will go to the Central Office. In that case, the Central Office funds would increase from $100 million to $119 million. This is modestly encouraging.

- For FY 1985, there is a vastly different picture. The budget reductions and a possible struggle between Congress and the Administration over the budget may result in a lower budget for FY 1986 than that of FY 1985. It is best to be cautious about future years and to prepare for the worst case. We should be creative with the funds available and not get locked into long-term commitments that we will be unable to satisfy.

• The attitude within AID regarding the population program is very positive. The Administrator believes in the goals of the population program and has confidence in it.

• The Resource Allocation Plan (RAP) is a collaborative undertaking among AID and the cooperating agencies. AID/Washington has conducted a lengthy consultation about the RAP with the Regional Bureaus and the Field Missions. This took time to negotiate. The present RAP is the last stage in the first year of a rolling planning process which is conceived to be very flexible, subject to change with changing circumstances, and to be examined annually for possible updating. It is intended that the RAP represent a consensus for the population community as a whole.

** END OF REMARKS BY DR. SINDING **

NATURAL FAMILY PLANNING. (NFP)

AID committed itself to obligating at least $5 million for NFP related activities in FY 1984 and it estimates that this has been surpassed for a total of $6.9 million. The cooperating agencies were requested to estimate the obligations for NFP in FY 1985 and to respond to a questionnaire regarding their NFP activities.

CONFERENCE AGENDA.

Mr. Joseph Loudis, Deputy Chief of the Family Planning Services Div. informed attendees of papers available for their reference: " An Analysis of the Resource Allocation Plan " by FPIA and "Creative Financing" by Dr. Deirdre Strachan and Sylvia Vriesendorp of the Pathfinder Fund.

The task force reports to be presented today mark the culmination of a year's efforts. Last year at the first meeting of this kind among AID and the CA's, we identified some key hurdles such as multiple donor funding, duration of project support and income generation. We would like to have actionable recommendations to improve our assistance efforts.

In addition to the task force reports, our agenda will include a discussion of the Management Information System (MIS), an analysis of the FY 1983-84 CA expenditures and the RAP mentioned by Dr. Sinding.

TASK FORCE REPORT ON SELF-SUFFICIENCY.

[Editor's Note: The brief presentations by each task force largely followed the outline of their respective reports. In order to avoid repeating information already available in the reports, these proceedings will present brief highlights of these presentations and refer readers to the reports for more detail. Please note also that each task force report contains an executive summary with all the recommendations.]

Ms. Cornelia Connor (FPIA), Chairwoman: The task force expanded the topic from income generation to self-sufficiency since income generation is one means among others to increase self-sufficiency of grantees. There were several concerns or issues considered:

1. Would the goal of self-sufficiency serve to displace or conflict with the goal of delivering family planning services?

- We believe that the primary goal is to deliver a given quantity and quality of services and that the goal of self-sufficiency should be construed to enhance that primary goal and not diminish it, especially where it might reduce service delivery to the poor.

2. Do we ignore the public sector and focus exclusively on the private sector?

- We believe that the private sector is a complement to the public sector and not the exclusive focus of this effort.

3. Are we trying to make profit-making groups from non-profit making organizations?

- Complete self-sufficiency is rare and the particular techniques employed need to be adapted to the circumstances in each case. We believe that some degree of self-sufficiency is possible for most grantees.

The definition of self-sufficiency, the goal and the major means to accomplish that goal, the assumptions made by the task force and the recommendations are all contained in two pages of the executive summary of the report.

Each member of the task force presented a portion of the report, details of which are available in the report.

DISCUSSION.

On the subject of interest and program income, Mr. Stephen Tisa (AID/GC) noted:

- If interest is earned on grant funds advanced to a grantee and deposited in interest bearing accounts prior to use for project purposes, Comptroller General decisions require the interest to be paid into miscellaneous receipts of the treasury. OMB Circular A-110 applies this principle uniformly to all United States Departments and agencies that make grants to private voluntary organizations.

- Program income is revenue generated or earned by AID supported activities. Under OMB Circular A-110, program income may, with the agreement of AID, be used to further project purposes, to finance the non AID share of project costs or to reduce the AID contribution to the project.

- Program income may be deposited in interest bearing accounts pending use for the purpose agreed by AID and interest earned on program income may be retained and used for purposes of the project. In effect, such interest is more program income.

- There is no legal impediment to CA's using grant funds to make loans to grantees (subprojects). The same is true with respect to using AID funds for capitalizing a revolving fund for use by grantees.

- It would be necessary, however, for AID to approve the loan and revolving fund features as part of the activity for which AID is providing grant support.

4. Can interest earned from a grantee's program income be authorized for fund raising? There is no clear answer and it will have to be reviewed.

Ms. Judith Johnson of the AID contract office made clear that AID had little impact upon OMB regulations but the application of those regulations and federal cost principles to non-US grantees is controlled by AID policy rather than OMB. Thus we need to know the origin of the various rules in order to direct our comments for change. For example, AID has little control over fund raising rules.

Ms. Johnson noted that the efficiency of the approval process can be increased. Many contract office approvals now required can be eliminated. For example, all consultants can be approved on one list for the entire year. The same can be done with vehicle purchases. Suggestions are welcome on what can be approved early in the contract period to avoid piece-by-piece approval of each particular action. It is also possible to consider a waiver to permit USAID missions to authorize vehicle waivers and also local purchases. All possible blanket waivers should be explored to facilitate action.

AUDIENCE DISCUSSION

Question: What cost reductions have worked and from which field experiences can we learn the most?

Task Force: The principle we came up with is that we are more likely to be successful if we continue the income generation activities with which we are most familiar, such as sale of contraceptives and services. This must be tempered by the reality of local demand.

Most grantee income generation activities are small efforts compared to the progress that could be made by paying for the building which they use. Sometimes the rent paid over a five year period equals the purchase of the building. So self-sufficiency could be enhanced by cutting costs of rental through purchase of the facilities.

There are a lot of exciting opportunities for generating income. One project in Zambia is operating a gasoline station and financing itself. But we have a lot to learn. There also have been failures. Valuable time and funds have been spent on such ventures. We need to share our experiences as to when and when not to engage in non-family planning related activities. We need to develop much better guidelines. Both we and our grantees lack the expertise.

Question: What programs generate more than 50% of their income and how many grantees have been able to buy their own buildings?

Task Force: FPIA has several examples where more than half of the costs are met by income generation. Ecuador has one such project run by female physicians. In Pathfinder's experience, several projects have become self-sufficient. Most of these have been clinics where the medical services subsidize the family planning. Good earners are selling lab services, pap smears--but these are usually urban clinics. In Indonesia, a project charges for services and this is the only example of a CBD program that has become self-sufficient.

Question: Has anyone considered putting together a casebook of the successful and the unsuccessful experiences? This could be helpful.

Task Force: We have barely touched on the possibilities of cost reductions. There is considerable work going on. Just good, basic administration may help increase efficiency and thus make funds go further.

Comment by Mr. Loudis: We are often asked about success stories and we keep such reports. One of the outcomes of these meetings should be some publications that would be useful to all of us. We should also do some studies that would suggest actions that we could put into effect to improve operational effectiveness. We should look into waivers about purchase of buildings and collaboration with other international agencies such as"NORAD". We will meet with the Task Force chairpersons to identify publications that might result from this work. As a start, we have permission to distill the proceedings of these meetings and send them out to AID Field Missions through the AID information dissemination network.

** END OF MONDAY MORNING SESSION **

COMMENTS BY DR. C. NYLE BRADY
SENIOR ASSISTANT ADMINISTRATOR
BUREAU FOR SCIENCE AND TECHNOLOGY

Someone reading the newspapers might get the impression that the US Government had reduced its emphasis on Family Planning programs. The reality is that we are spending some $90 million more for such programs than we were in 1981 when I joined AID. On the question of abortion, we will be following the guidelines given us strictly.

The tragedy in Africa is bringing to the fore the critical role that Family Planning must play. The droughts are no worse than before but the number of starving is greater. There simply are more people. The per capita food production in Africa has declined. There has to be a better balance between population and food production.

The Agency has a strong commitment to family planning. I want to express to you how much we appreciate the work that you are doing. I am amazed at the efficiency with which population funds are utilized, at the ease with which innovative approaches come from the system and at the reasonable harmony among AID, the CA's, the Washington staff and the field staff. I think it is because of people like you who come to these meetings and share your ideas with us. I appreciate the opportunity to associate with you in this effort.

Dr. Weintraub:(FPIA): Will the Government guidelines on abortion be published in the federal register to permit comment or a lawsuit to test their constitutionality? Or can the decisions concerning the funding of organizations involved in abortion await a court decision on the constitutionality of such decisions?

Mr. Loudis: The guidelines have not yet been developed. Until they are it does not appear reasonable to contest their legality.

Dr. Brady: The guidelines will be developed not only by AID but in coordination with the Justice Dept., and others. Mr. Peter McPherson is determined to make this policy work the best way he can and to work in harmony with the contractors.

Comment from floor. Some guidelines appear to have leaked out and gotten into cooperative agreements. Do these provisions stand?

Dr. Brady: We are awaiting the guidelines and if they require any amendment of the language now incorporated in agreements, then that will be done.

Comment: The IPPF adopted a budget which makes cuts based upon our doubts as to future core support from AID. Can you give us some idea when AID will have concrete guidelines that we can look at?

Dr. Brady: I would hope that within two weeks we will have guidelines. We will do everything we can to move quickly and to have discussions with IPPF. We have not done any contingency planning of how to use the funds if IPPF cannot be continued under the new guidelines.

Comment: Would you (Dr. Brady) be willing to publicize your statement about the impact of population on famine? It would carry great weight from an expert in agriculture.

Dr. Brady: I already have. I made a 20 minute recording for TV of which only ten seconds was aired and that failed to mention my remarks on population. In my speeches I do refer to the population impact since that is at the core of the problem. I am willing to make my views known.

Question: What might happen to the population budget account in the next four years?

Dr. Brady: I predict that the population account will stay at a level that will not be disappointing to you because of the support for it.

REPORT OF THE TASK FORCE ON MULTIPLE FUNDING AND DONOR COORDINATION

Chairman, Terrance W. Jezowski (AVS): The Task Force has not found any serious problems with multiple funding nor with donor coordination. The topic was suggested by AID, but based upon CA experience, there is no serious issue here. Much informal coordination among the CA's is underway.

Based upon an analysis of the 1983 AID Management Information System (MIS) data by FPIA, there are 900 grantees of whom only 19% are multiple funded and of these the IPPF affiliates received 57% of the funds--largely in the Latin American Region. However, these grantees received about 60% of the funds provided by the CA's to all grantees. Thus, multiple funding is not a system-wide problem, but it is important to address the issue wherever it occurs.

The advantages and disadvantages of multiple funding are noted on pages 12-13 of the task force report. The task force does not recommend centralized, institutional mechanisms to coordinate multiple funding of grantees. It is preferable to emphasize personal CA responsibility for coordination and AID must lead that coordination. Ways to do this include conferences such as this--jointly developing agendas well in advance of the annual meeting. In addition, there might be annual coordinating conferences for a few grantees. Also, it helps to have experienced population officers in USAID missions, especially in Africe. Coordination should be ad hoc according to specific situations.

[Editor's Note: The task force report on this topic is the most detailed and lengthy of the three reports. The recommendations alone cover six pages of text. In order to avoid repetition, please refer to the executive summary of the report for coverage of the oral presentation by the task force members. The following proceedings cover only the group discussion that followed the oral presentation.]

Comment from the Floor: The first recommendation is that each CA and AID act as if coordination is their special responsibility. I question the feasibility of this when one CA may have only one project with a grantee and must then gather information about the total activities of the grantee and about every other donor. I would suggest that each CA limit itself to providing information only about its project and only about those inputs which may affect the outcome.

Task Force Response: In practice, it has not been difficult to gather this information--at least in the experience of FPIA and the AVS. Many organizations are doing this. When an audit is performed on the grantee, the kind of information we are talking about is normally gathered. However, Mr. Jezowski believes the scope of information gathered can be limited to the sources of support that affects the particular project in question. Moreover, the process can be assisted by reports from the population projects data base to which we are all contributing.

Ms. Piotrow (PIP-Johns Hopkins): Very few requests have come in for the population projects data base other than from AID. I would urge you to make more requests for such data on a particular country. It is better for the CA's to determine what analyses they wish to make rather than for the population information program to make the analyses.

Comment from Floor: One of the key problems is the potential duplication of payments by CA's where it is not easy to discover either by the CA or by auditors. Another aspect of the difficulty arises from the fact that boiler plate language differs because the AID regulations are different for educational institutions and for non-profit organizations, both of which are represented here. Those regulations in turn are different for program accountability and for financial accountability. We should note that the regulations are based upon OMB circulars but that AID has discretion in how it applies them to overseas grantees. Therefore, some of the problems need to be resolved by AID through its Handbook 13.

Task Force (Ms. Gibbs-Pathfinder): Speaking of multiple funding, this is one of the few agencies that looks at budgets separately from project descriptions. Normally, the budget is an integral part of the project plan and must be defended as such. The project budget in turn is part of the grantees total budget, so that we as CA's are entitled to see the budget of the grantee. This is not only good management but also our fiduciary responsibility to the US Government and the public. It is the only away to assure that we are not duplicating payments.

Task Force: Sometimes it is necessary to help the grantee to develop the capacity to manage its funds. For example, it may be necessary to help finance the services of an accountant to help collect the data needed.

The budget is a useful source of information about the grantee. For example, it may help reveal whether it spent last year's funds, and its absorption capacity; it may reveal the cost base for operations and indirect costs. The turnover of staff may tell a great deal about the agency.

END OF DISCUSSION

Concluding remarks by Mr. Loudis: Thank you for exceptionally well prepared presentations. AID has prepared a handbook which publicizes the capabilities of the CA's. This has been distributed to the field and to all personnel going to the field. We will make certain that you each receive a copy.

A Directory of technical assistance is important. We will start working on this very soon. Our new contractor, the International Science and Technology Institute, should help by listing the kinds of technical assistance available for various kinds of LDC needs

END OF MONDAY SESSION

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START OF TUESDAY SESSION

Opening Remarks by Mr. Loudis: To assist you in later discussions on the AID Resource Allocation Plan (RAP), Ms. Chen who manages the Population Projects Data Base (PPDB), will give you some data on the FY 1983 and FY 1984 financial status by institution, country, and by region. This will help when you plan for future years. I wish to reaffirm that the RAP is indeed a draft; that it is not locked in and will probably go through many changes.

Presentation by Ms. Chen: Data collection for the Population Projects Data Base was initiated in October, 1983. The PPDB has been operational for 8 months. This system which covers 2000 projects is useful to AID though it has not yet been fully utilized by the CA's. You are encouraged to call John Hopkins University or us (the Population Office) to obtain information.

We plan to distribute a country profile report every year, the first of which was sent in July 1984. The system can be used at any time by simply calling for information. The system is being constantly updated. It is used to provide Congress with information by country and by different AID program goals; it is used for country strategic planning. Therefore, your cooperation in providing data is quite important. Once a year we will send each CA a listing of subprojects for review and correction.

It is difficult for us to assess the quality of the information we receive. We seem to have good coverage for FY 83 but the data appear not yet complete for FY84. Please send us the data for FY84 as soon as you can.

[Ed Note: The rest of Ms. Chen's comments which were based upon documents handed to the audience re. the RAP are omitted.]

It is our aim each October to complete the previous year's data as soon as possible in order to make it available to all. Please help on this.

DISCUSSION OF PPDB

Mr. Loudis: The data in the PPDB do not accurately reflect the proportion of core costs to program support costs. This distorts the financial picture of several programs and needs to be corrected.

[Ed. Note: Comments by Ms. Piotrow, Ms. Ellis, and Dr. Weintraub not audible. The substance of their remarks was that the definitions of terms in the PPDP need to be refined and that the report was not designed to be a financial report.]

Mr. Hemmer (AID): The worth of the PPDB depends on three things; 1. The definitions need to be refined. 2. The good sense with which the system is used. At this point it would be well to experiment with the system in order to better determine where to put the resources for improvement of the system. 3. The frequency of updating the system. The key is to get to automated data processing so that updating can become more manageable. The UNFPA now does it that way and we estimate that eventually the UNFPA will make about half of the entries to our system. The UNFPA plans to update their data into AID on a quarterly basis. For those doing manual updating, look into the possibility of automating both for greater accuracy and more timeliness.

Ms. Piotrow (PIP): The least reliable data in the PPDB are the financial data. It can help indicate trends but it is not an accounting document and should not be considered as such. The most important product of the PPDB is to know what is going on in the project rather than the fiscal data.

SESSION CONCLUDED

REPORT OF THE TASK FORCE
PLANNING AND DURATION OF PROJECTS

Chairman Eliot Putnam: My thanks to Joe Loudis for the organization of this meeting and also to Ed Rizzo and Mary Seliskar for the help and support they gave us and the other task forces these past few months.

The focus of the task force was broadened from duration of Family Planning projects to the planning and duration of projects since it seemed to us that duration is a function of the planning process. We broke down our topic into three sub-topics: Country level planning, the review and approval of subprojects, and the duration of project support. Let us have discussion after our presentation on each of these topics. Hugo Hoogenboom will present our recommendations regarding country planning.

I COUNTRY LEVEL PLANNING.

[Ed. Note: Please see the recommendations for country planning in the executive summary of the report, Pg. 2-3.]

Floor Comment: The Country Development Strategy Statement (CDSS) is a very abbreviated document that often deals too briefly with population. In some cases there may not be any mention of the population programs if it is a sensitive matter with the host country. It often reflects what the mission believes the host government will accept in population programs but not necessarily what is possible in the private sector.

There is also a decided difference between bi-lateral and non-bilateral missions in the way they plan for population programs. Where there are bilateral programs with host governments, there often is little interest on the part of the host government in providing resources to the private sector for population programs. Thus a CDSS in such a context will emphasize government programs rather than the use of CA's to work with the private sector. The reports of this meeting and of the task forces may stimulate our field population officers to influence the missions and host governments to utilize some of the bilateral funds for private sector programs.

Question: How does AID strategic planning for population work in non-bilateral countries?

Tom Donnelly (AID): The process of strategic planning is informal. It depends on the presence or absence of an AID Population Officer and that person's approach. In Colombia, where there is one major organization, the process is simpler. In Mexico or Brazil there are more options than there are resources, and so a decision must be made as to which options to support. Such decisions must look at opportunities and also at the participation of the CA. We must find ways to increase the involvement of the CA in that process. Presently, Brazil and Mexico are at that stage of strategic planning. There is no easy answer to the question. It all depends on the persons, the options, the organizations involved and the approach.

Bob Corno (AID): For the LA Region, there have been annual population plans for the non-bilateral countries. These have been reviewed by AID/Washington and also informally discussed with CA's.

Eliot Putnam (Pathfinder - PF) In Recommendation 6 where we suggest that CA's comment on population strategies, we may be asking for a change in policy.

Joe Loudis (AID): The CDSS are readily available. It may be an overly brief document but it is an indicator of the direction of AID assistance for that country.

Dan Weintraub (FPIA): The CDSS is helpful because it goes far beyond population giving the social, economic and political context.

Hugo Hoogenboom (AID): The CA's can be effective by informal contacts and staying in touch rather than by asking for a formal change that is so difficult for a large organization to accomplish.

II THE REVIEW AND APPROVAL OF PROJECTS

Eliot Putnam (PF): Our goal in this section was to speed up the process while maintaining its quality.

[see Report Executive Summary Pg. 3-4.]

Comment by Ed Dennison (Development Associates - DA): The whole review and approval process takes too long and does not appreciably add to the quality of the decision. A management analysis should be done by AID and the CA's to find ways to streamline the process to reduce the time.

Terry Jezowski (AVS): It would help us to know the approval criteria used by AID.

Win McKeithen (AID): Is AID involved in the process too late? Would it be more productive to have an earlier involvement so that less time would have been spent in planning before changes are made?

Tom Donnelly (AID): My opinion is that AID/W involvement is too late. We can examine whether the plan is well written, whether the budget makes sense and whether the project makes any sense in the country where it is to be implemented and how it compares to other options for that country.

Carol Klein (FPIA): What criteria are used by the committee for project review in the Population Office?

Tom Donnelly (AID) : There are a series of questions posed by the committee. They are outlined on page 11 of the task force report.

Joe Loudis (AID): It is important for us to know the significance of the project to the country and not just whether the project is a target of opportunity for the CA. The ultimate approval of projects is made by the AID Contract Office. The Population Office has been delegated approval authority for projects up to $100,000. The CA's in turn are given authority to approve projects up to $7500, no-cost extensions, local currency increases, budget realignments, etc. All of these authorities have been delegated by the contract office. And more can be requested of the contract office. For one agency, these delegations affected about 40% of its projects--a substantial saving in the time and workload for them and for AID. We are interested in streamlining the review and approval process.

Dan Weintraub (FPIA): Time can be gained by sending a copy of a project proposal to the contract office at the same time it is sent to the field mission.

III DURATION OF SUPPORT.

Presentation by Carol Klein.

[Please see recommendations on pg. 4 of the Executive Summary.

Discussion

Eliot Putnam (PF): Is it demoralizing to call for a phase out when you are trying to encourage a grantee to undertake a project?

Win McKeithen (AID): Every bilateral agreement has a phase out date so it is common to expect it.

Eliot Putnam (AID): Our goal should be to help the grantee to become a more self-sufficient institution. It sometimes defeats our goal if we phase out and another external donor picks up support.

Steve Sinding (AID): The ultimate goal may not be full self-sufficiency of the grantee. It is laudable to think of phase out but it is not the primary goal. In population, unlike education, agriculture, etc., the objectives are shorter term. Population is a means to development and not a long term development goal. I think we should worry less in the short run about having local resources supplant external resources. Our primary goal should be support of a cost effective program and institution building should be a secondary goal. Of course we should phase out ineffective organizations. As long as population is a pressing problem, we should support institutions doing a good job. It is critical to look for local resources to supplement our own--but the primary objective has to be to support cost effective organizations.

Erich Hofmann (DA): Often training stops when our aid stops even though the grantee is a model organization. We sometimes need to continue assistance to fulfill the population program objectives.

Dan Weintraub (FPIA): I support the task force recommendation because you sometimes can get more fertility decline by phasing out projects. There is no fixed phase out period but sometimes a phase out stimulates clients to search out alternative means and this enlarges the resource base. In one country where the government declared that contraceptives had to come from pharmacies, we found that 65% of the clients did continue on that basis. Funds so released can be applied elsewhere.

END OF SESSION

Eliot Putnam (PF): One person who has had a bird's eye view of this entire process of collaboration between AID and the CA's in the task forces is the consultant provided by AID--Ed Rizzo. I have asked him to comment on the process as he saw it.

Ed Rizzo (Consultant): It may be worth while to go behind the scenes to view the human and institutional drama played out in the last few months in these task forces to draw some lessons for the future.

Expectations: The expectations for these task forces were quite mixed at the beginning of the planning period in June of 1984. There was skepticism that the tasks could be completed in the busiest time of the year, competing with vacations, travel, the Mexico Conference and end of year reports. There was some suspicion that AID had some hidden agenda and was trying to manipulate the CA's. There was concern that the complex and inter-agency nature of the problems were not susceptible to a rapid treatment in view of the short time and great diversity of the CA agencies and AID. There were some positive views: that this was the first occasion for a task-oriented, inter-agency, approach to problem solving. As the task force chairpersons met with AID in mid-June, the consensus was that it was worth trying and if during the work period it seemed that the expectations for quality reports could not be met, then changes would be made.

What happened? It must be realized that this kind of overall look at a complex series of inter-related problems by all the agencies and AID had never before been attempted. Remember that we are dealing with 900 projects, in some 36 countries, with about $71 million annual resource flow, and the involvement of 11 CA's and various parts of AID--field and Washington.

1. The work of the task forces was marked by its civility despite the large opportunities for clashes of views, interests. There was a surprising convergence and agreement.

2. It was marked by continuous learning, expansion of vision by each participant and agency and discovery of what each could contribute and learn from the others.

3. The process was much more constructive, creative and fun than I thought possible given the constraints.

4. There was a great deal of personal commitment and indeed sacrifice that went into the end products. Many individuals gave up vacations, evenings and weekends to work on their parts. Eliot Putnam had to do two jobs plus the chairmanship. Connie O'Connor worked seven days a week holding two jobs plus the chair's responsibility. Terry Jezowski had to work on his annual budget, the Mexico Conference and the chair's job. Many others worked around their normal duties and used their vacations and free time to do the work of the task forces. Thus, there was a great deal of giving, certainly more than called for by a position description.

5. One of the AID objectives that went beyond the substance of the task force work, was to initiate a mode of collaborative and constructive work jointly with the CA's. In my judgment, this was accomplished extremely well as you can see from the kind of cooperation that was obtained from all.

6. Moreover, the substance of the reports marks a definite contribution to the system improvements. Some of the task force reports, such as those on self-sufficiency, actually contribute to the state of the art. We know more now about income generation than we did before the report of that particular task force. All in all, the task force reports have put us ahead of where we were in May 1984.

The future? We have all come a long way but there is a long way to go! The very nature of the AID/CA system that calls for AID/W agreements with diverse and independent agencies operating all over the world with 900 grantees in a variety of countries and circumstances in highly innovative ways would obviously breed its own nest of problems. Some of these problems will continue to plague us. How for example to forge coherent and relevant country-level efforts from the great number of diverse approaches at the micro project level? Coordination among the CA's, the various parts of AID and the various parts of the host country continues to be a difficult thing to do. How to balance AID/W direction with the various field and CA perceptions?

The search for an integrating concept, for a coordinated vision of what must be done in a given country by all the actors involved will continue. But we have found a way to work together constructively in that search. The task forces have done a brilliant job in moving us forward.

END OF SESSION

THE RESOURCE ALLOCATION PLAN
TUESDAY PM SESSION

PRELIMINARY REMARKS

Steve Sinding (AID): Congratulations to the task forces, to the Family Planning Services Division and to Ed Rizzo for the part they have played in this process. I hope the task force reports will produce useful results.

Those CA's making the most contribution to Africa are represented here. There is strong support and appreciation for your work there. Thank you also for your very strong support to the program during this very difficult year. I very deeply appreciate it.

The Resource Allocation Plan (RAP) is clear and self explanatory. Reason for RAP. Resources for S&T/POP have been shrinking relative to demand for the Population Office as more countries and organizations become involved in the program. Therefore it has become more important to establish criteria for allocating resources. The criteria are not weighted but they include a country's population size and rate of growth, the absorptive capacity, the capacity to mobilize resources and the presence or absence of bilateral programs.

Our ground rules for the RAP:

1. It is not a rigid quantitative analysis. It represents the best judgment of experienced professionals.

2. It is never a final document. It is a rolling plan. We hope to review it annually, or more frequently, and make whatever adjustments are required. It is not a blueprint.

3. We proceeded from inside AID outward. There was a long laborious discussion with the regional bureaus and missions before this meeting.

4. The document is uneven. Each technical division of the office took its own approach. It is not an office plan but several division plans.

The AID sector council largely agrees with the RAP. Half of the missions have responded. We are as close to a consensus as is possible, but not yet at full consensus. The Asia Bureau feels it is getting less than it deserves but we are making tough choices. There is a question about whether Africa has too little or too much.

5. RAP has two characteristics: It is flexible and multi-dimensional.

I have a profound respect for the professionalism of the CA's and for the accumulated experience you represent. So this is a common endeavor to meet our common goal. I would appreciate your general responses to the RAP.

Hugo Hoogenboom (AVS): The last plan for a ten year period was rigid and did not work. This RAP should be used flexibly to:

1. recognize differences among CA's
2. use as goals and not quotas
3. use on the exception principle; and
4. Consider the CA's own strategy, so that the RAP is a wholesale plan rather than a retail plan at the project level.

Steve Sinding (AID): The RAP is all you say. It is not meant to force compliance at the project level. Deviations are permissable.

Eliot Putnam (PF): The RAP is unsettling, challenging but an enormously useful tool. It appears to focus on the private sector but in some countries we feel it is worth working in the public sector. What balance should there be on this aspect?

Steve Sinding (AID): There is a broad range of views in the Population Office. The RAP reflects the views of this administration that the private sector is highly cost effective. While recognizing that the public sector often has a major role as well the obvious way to go is a partnership of both sectors. Please note that the Central Office of Population is more private sector oriented than the Regional Bureaus which tend to work through governments. Therefore there will always be a tendency in the Central Office toward work with the private sector.

Tom Donnelly (AID): There is a question of balance among the sectors. The Central Office is primarily responsible for the private sector and the CA's primary experience is with the private sector. So it is not a question of emphasis on one to the exclusion of the other sector but a search for a balance in a given country.

Phyllis Piotrow (PIP): Congratulations on a good planning document. The strength is that it does not fit any one CA precisely. There is an issue of technical assistance versus project support. There may be a tendency for the bilateral programs to look to the CA's for T/A more than for support of projects. Have you thought about this shift in balance? Should we give more attention to this T/A role?

Steve Sinding (AID): We have not given much thought to that issue. We should not apply the plan so as to preclude T/A. I would welcome other views on this.

Are you suggesting separate allocation for T/A versus financial assistance? Those CA's who feel that a specific amount should be allocated to T/A please speak up.

Charlotte Ellis (Johns Hopkins): Do the figures reflect purely program funds versus core costs?

Steve Sinding (AID): All costs, both program and core are included in the figures.

Dan Weintraub (FPIA): Congratulations for a excellent document. But please note that we cannot travel to five of the high priority countries.

Steve Sinding (AID): That is what makes them high priority countries. (Laughter)

Dan Weintraub (FPIA): Flexibility is therefore important. It is helpful to remove percentages for any CA to avoid the notion of a target.

We should eliminate the phrase of "no new starts in LA" otherwise it becomes marching orders.

We can agree with the objectives on a regional basis but the difficulty arises as we get more detailed.

Tom Donnelly (AID): We did consider whether projects dealing with population policy would lead to Family Planning Service Projects and finally came to the decision that policy projects do not necessarily lead to service delivery projects which need to be funded by us.

Steve Sinding (AID): Some CA's have a broader mandate, like the FPIA. We will try to more sensitively reflect that perspective. Would you agree to a percentage by CA if we agreed on the particular percent?

Dan Weintraub (FPIA): It is difficult to project accurately three years.

Steve Sinding (AID): If we cut out the target, then there is no responsibility upon the CA to meet it. The responsibility then rests solely with AID. We can have a goal without having marching orders.

Charlotte Ellis (JH): It may take more funds to backstop a small country versus a large country.

Steve Sinding (AID): I agree but what should we do about it? I am not sure how to deal with it. We can build it in if someone figures out how to do it.

Tom Donnelly (AID): How significant are the amounts involved?

Floor Question: How will progress be monitored?

Steve Sinding: Each division will monitor progress via the mission. We hope it is good enough.

Floor Comment: Should the mission reflect dollar obligations, or the currency fluctuations, or project expenditures, or calendar year or fiscal year periods?

Hugo Hoogenboom (AVS): If the data are consistent, we can deal with trends and orders of magnitude rather than precise numbers.

Phyllis Piotrow (PIP): Keep in mind the mission is not a financial accounting tool.

Steve Sinding (AID): A plus or minus of 5% in the numbers may be adequate.

Terry Jezowski (AVS): I am uncomfortable about specific percentages for each CA and about specific prohibitions about new starts in certain countries. The AVS trend lines correspond with those of the RAP. We are pulling funds out of Asia to move more into Africa and LA, our effort in Asia remains as intense though with a different mix of resources.

We need to gauge the technical input into countries. How do CA's work with the missions in using some of the bilateral funds. It is difficult to loosen up such funds. Should we talk about this aspect?

Steve Sinding (AID): There are several approaches.

1. Funds could be transferred to the Central Office.
2. Make direct contracts with the missions.

We are looking for other ways also. AID/PPC is struggling with the budget and how to divide funds between the bilateral and central programs. We are not near a conclusion on this difficult issue. Some Regional Bureaus find it easier to transfer funds to the Central Office and others do not. Each Bureau is different. Work out your own deals for contracts.

Question: What are the funding trends in the RAP by division? How was the allocation made by functional area such as policy, etc.?

Steve Sinding: We divided functionally on the basis of 18 years annual budget exercises by the divisions. It is probably right because every division is not happy with it. We are putting:

55% in services.
15% in supporting services such as training.
5% in policy.
5% in demography.
20% in research.

The Regional Bureaus seem to be satisfied with this division and this is as good a measure as any as to how we are responding to needs in the field.

Question: Will there be another draft of the RAP as a result of this meeting?

Steve Sinding (AID) : If the discussions this P.M. seem to lead to closure, then I will ask the divisions to do a final version based upon (such understandings) and then issue the RAP for FY 1985. Our general thinking is to review it next year and see what changes if any are appropriate. The next draft will go to all CA's and the missions. There is no final version--only drafts. Next month we should have the FY 85 draft that will be distributed to all.

Comment: There is a trend to loan financing. The amount of support to non-governmental organizations is the issue because the governments do not want funds to be taken from them. With the Asia Bureau we have not been able to set up a regional account.

Sinding: Before we break up into separate groups, let us hear briefly from each S&T/POP technical division a brief summary of their portion of the RAP.

Policy Division The RAP consists largely of small, short term technical assistance projects so that we are flexible in responding to changing needs in the field. We use the RAP as a management tool in responding to field needs.

Research Division We have three discrete areas:

1. Contraceptive Development deals with three contractors and most of the funds are spent in the U.S. So the RAP is quite heterogeneous by country and region.

2. Demography - We have a small number of projects reflecting data collection by country. The table on page 46 shows the types of surveys by country based upon demand.

3. Operations Research - This reflects one contractor per region. The allocation shows funds moving from LA to Africa and Asia.

Family Planning Services Division - Services by the CA's should be available everywhere. For this reason, it is important to distinguish the bilateral and non-bilateral program needs. We emphasized assisting the non-bilateral countries because central funding support may be the only AID input available to them.

Are the Regional Bureaus willing to buy in to support CA projects for their areas? The needs differ by region. Again the question becomes one of balance--how to assure some activity in each country.

Commodities We have no separate plan. We follow the lead of services. For CDC technical assistance resources, there is no allocation plan since these resources are provided upon demand.

Information and Training The criteria were based upon need, the demographic importance of the country, the availability of other support, the absorption capacity and interest in assistance. The allocation is:

40%--For Africa.
30%--LA.
15%--Near East and South Asia
15%--Asia

Within each region, the countries were ranked by priority.

LA-----Brazil, Mexico and Peru
Africa-Nigeria, Tanzania, Kenya, Sudan, Zaire.
NESA---Turkey
Asia---Sri Lanka, Nepal.

END OF SESSION

The attendees then formed several groups according to technical divisions to discuss the RAP in detail.

END OF CONFERENCE

APPENDIX A

LIST OF TASK FORCE MEMBERS

TASK FORCE MEMBERS

PLANNING AND DURATION OF PROJECTS

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APPENDIX B

EXECUTIVE SUMMARIES OF TASK FORCE REPORTS

REPORT ON PLANNING AND DURATION OF PROJECTS

EXECUTIVE SUMMARY

I. COUNTRY PLANNING

RECOMMENDATIONS

		ACTION RESPONSIBILITY
1.	The Office of Population and the AID Regional Bureaus should send to the appropriate CAs whatever strategic guidance or plans they deem helpful to the CAs for the particular country or region in question.	AID: S&T/POP Reg. Bur
2.	The USAID Missions should send the relevant CDSSs or population strategy plans for their host countries to those CAs operating in those countries.	USAID
3.	The CAs should send copies of their strategic plans to the appropriate USAID Mission Population Offices, and to the Regional Bureaus that express an interest in having copies.	CA's
4.	AID should formally apprise CAs of countries considered high priority. AID must allow CAs time to reallocate resources (time, staff and money), in order that they may respond without unduly damaging on-going program efforts. (Note: At the 1983 November Coordination meeting, CAs reported that the greater proportion of their resources were allocated in AID priority regions and countries.)	AID: S&T, POP
5.	When USAID develops country strategies for population activities, they should take into account the strategy statements of the CAs for the country, as well as on-going activities.	USAID
6.	After USAID has developed a country population strategy that may involve CAs, it is suggested that the CAs be invited to comment on the population strategy and include proposals of CA roles in the implementation of the strategy.	USAID

7. When negotiating Cooperative Agreements, AID and CAs should consider strategic plans, agency goals and philosophies, so that these agreements strengthen the process of coordination.	AID, CA's
8. CA's should share annual reports with all other CAs.	CA's
9. When writing project proposals, each CA should clearly indicate how the project links into the CAs country strategy and the USAID country program and describe the role and support of other agencies.	CA's

II. REVIEW AND APPROVAL PROCESS

RECOMMENDATIONS

	ACTION RESPONSIBILITY
1. The Office of Population should furnish grantees with the criteria it uses.	S&T - POP
2. The CAs should initiate action on their own to examine their current criteria and change them where appropriate.	CA's
3. Both AID and the CAs should review the present approval procedures and streamline them where appropriate. For example, it may be possible to review and approve some proposals within one month. Guidelines should be suggested for both the CA and AID components of these lead times.	AID & CA's
4. Those CAs which believe they have grantees which could qualify for a fast track should propose these for discussion with the Office of Population.	CA's
5. The Contract Office should have the authority to approve grants of 24 months or less.	Contracts
6. The Contract Office should delegate to the Program Office the authority to approve grants of $250,000 or less.	Contracts
7. USAID missions should be given the option to cable to AID/W approval of projects based on drafts received in the	AID/W

field, thereby eliminating the step of AID/W sending a final copy of the proposal to the mission for approval.

8. CA's should have the authority to approve continuing projects of $50,000 or less with prior USAID Mission approval but without AID/W approval. — AID/W

IV. DURATION OF SUPPORT

RECOMMENDATIONS

		ACTION RESPONSIBILITY
1.	The CAs should share with each other, with AID and with the USAID Missions the overall criteria used to determine duration of support and to measure the success of a phaseout plan.	CA's
2.	CAs should plan the duration of assistance with a grantee agency at the time the proposal is developed. Immediate project objectives and institutionalizing goals should be considered when setting time limits.	CA's
3.	CAs should incorporate into the agreement the specific criteria used to determine duration, and a phaseout plan.	CA's
4.	CAs should assess the plan for phaseout of assistance with the grantee, the USAID Mission and AID/W on a regular basis and redesign the plan or reschedule phaseout as necessary.	CA's
5.	USAID and AID/W should avoid letting shifting or short-term priorities inerfere with agreed upon phaseout mechanisms.	AID/W USAID
6.	CAs, USAID and AID/W should with the phaseout of direct project support, have the option of continuing other types of assistance such as the provision of commodities, training, conference participation and technical assistance.	AID/W
7.	AID/W should develop a mechanism, possibly using institutional development funds, to aid a grantee in continuing core activities after cessation of support.	AID/W

REPORT ON MULTIPLE FUNDING AND DONOR COORDINATION

EXECUTIVE SUMMARY

Note: Given the extensive scope of this Report, this Summary deals only with the recommendations. For supporting rationale, please consult the text of the Report.

There is no serious problem with multiple funding of a grantee organization by Cooperating Agencies, but much can be done to improve coordination and communication.

General Recommendations

	Action Responsibility
1. It is recommended that each CA and the individual units within AID (S&T, POP, Regional Bureaus, USAID Missions, etc.) act as if coordination and communication is their special responsibility. Each CA and AID unit should internally foster and cultivate a heightened sense of consciousness on the importance of appropriate communications with each other, and each should take the initiative to coordinate when the need is perceived.	All CAs and Units of AID
2. AID and USAID Missions must take a leadership role and provide an example for appropriate and constructive coordination and communication.	All units of AID
3. AID ought to review the quality of its internal coordination and communication, i.e., between S&T/POP, regional bureaus, contracts office, and USAID Missions. S&T/POP should take the lead and initiative to improve internal AID communications and coordination.	S&T/POP
4. The general spirit of appropriate coordination and communication can be enhanced by AID through the continued conduct of an annual CA coordination meeting in Washington. The value of such an annual meeting will be enhanced when AID actively involves the CAs in planning the agenda, meeting dates, and in leading discussions. This should be done with adequate lead time.	S&T/POP
5. Coordination and communication ought to be appropriate, and designed and scaled according to the merits of the local grantee situation. However, in a small handful of special situations, especially where the local grantee represents a critical program and receives large amounts of support from a variety of CAs, serious consideration ought to be given to holding, as needed, a coordinating meeting among the funding CAs, USAID and AID. Depending on the situation, the lead in organizing such a meeting may be taken by a CA, AID or the USAID Mission.	CAs or AID, or USAID Mission (as appropriate)

6. Sensitive and well-trained AID population officers have played crucial leadership roles in the advancement of family planning programs. Opportunities for coordination and communication are enhanced when AID places a professional population officer. Therefore, AID should continue, whenever feasibile, to place population officers in countries where interest in family planning is growing and where CAs are working. Experienced population officers are now needed in Africa.

S&T/POP
Regional
Bureau.

Multiple contractual requirements

Recommendations

1. CAs should review their boilerplates to ensure they are in basic, clear, understandable language. Boilerplates ought to be provided to grantees in the primary language of the grantee whenever possible. — CAs

2. CAs should share their boilerplates with one another so that they are aware of any differences in emphasis, style and content that might cause problems for a grantee. — CAs

3. CAs should must provide special technical assistance to grantees to ensure they understand and can comply with contractual requirements. Technical assistance might include the following. — CAs

- on-site, personal review of requirements by CA field or technical staff/consultant;
- checklists, to help grantees determine if they are in compliance with requirements;
- reference booklets which explain the meaning, purpose, and how to comply with the contractual requirement.

4. AID should compile a collection of such technical assistance tools/materials from CAs and should make them available to all CAs, especially new CAs. — AID and CAs

5. The task force noted that the A.I.D. Contracts Office has provided little, if any, guidance to some of the CAs on the development of their subgrant boilerplates, which are based on AID's Standard Provisions. The AID Contracts Office ought to provide constructive feedback to CAs on the boilerplates each has developed. — AID Contracts Office

Multiple Reporting Requirements

Recommendations

1. While recognizing that each CA will tend to develop unique reporting requirements, CAs are urged to minimize the numbers and complexity of reports. The number of reports should be kept to those essential for program monitoring and management. There are two related recommendations: — CAs

- The information required by the CAs in reports should be useful to the grantee. Whenever possible there should be feedback to grantee.
- The reports should be used by the CA. Reports that collect "nice to know" information should be eliminated.

2. a) CAs should assist grantees in developing appropriate management information systems (MIS) and databases that would allow grantees to generate the information needed for the CA's reports and to enhance the grantees' own management decision-making capabilities. CAs

   b) A.I.D. ought to identify resources (materials, consultants, agencies, etc.) that CAs can tap in assisting grantees to develop MISs. S&T/POP

3) CAs should attempt to develop standard family planning terms and definitions (similar to the WFHA-AVSC's Standard Terms for Voluntary Surgical Contraception) so that all CAs would be using similar reporting language with grantees, and to facilitate program research and comparisons. AID ought to take the lead in stimulating the development of such a reference tool by initially collecting, compiling and sharing CA's definitions. S&T/POP

Management Requirements Resulting from Multiple Funding

Recommendations

1. Audits: a) The task force considered various options to ease the audit pressures on grantees, including the conduct of simultaneous use of the same audit firms and timing of audit with the grantee's own annual audit.

However, these were viewed as impractical or impossible given AID demands on CAs for accountability. Therefore, it rests with AID to explore ways and means to relieve some of the pressures on CAS. AID

b) Audits should be viewed positively, by both the CAs and the grantee, as technical assistance and institution-building opportunities to help improve the grantee's financial management capabilities. CAs

c) CAs should build into agreements the necessary staff to handle audits and other administrative requirements, and CAs should provide technical assistance to help grantees understand administrative requirements. CAs

2. Site Visits and Planning Exercises: In certain programs where the CAs are contributing parts of assistance for a larger, comprehensive program package, CAs should coordinate among themselves and with the grantee regarding the a) annual planning cycle, b) grant award dates and project durations, and c) site visits. CAs

Absorptive capacity

Recommendations

1. All CAs should give appropriate levels of attention to the management capabilties of grantees to implement and sustain projects. CAs

- Timetables, budgets and expectations should be adjusted before and during a planned project according to grantee capabilities and changing circumstances.

- CAs must be prepared to provide or arrange appropriate levels of technical assistance to those grantees who require strengthening of management systems to properly implement programs. Institution-building inputs should be viewed as appropriate objectives for support by CAs.

2. CAs funding a single grantee should share with each other results from audits, site visits, reports and other monitoring exercises, and to develop technical assistance inputs to those grantees exhibiting systematic management difficulties. CAs

3. CAs funding a single grantee with a large program and budget should attempt to coordinate, as the need arises, in order to establish mutual expectations, timetables, and to identify technical assistance needs. CAs

Use of Technical Inputs

Recommendations:

1. CAs and AID should make every effort to coordinate the sequence, priority and timing of technical inputs, training, assessments and evaluation. CAs AID

2. A.I.D. should take a more active role in informing CAs and grantees of the technical assistance resources available. This would include, inter alia: S&T/POP

- A profile of the technical strengths of each CA
- Training Program, training institutions and special courses
- Consultants

Furthermore, A.I.D. should have a clearinghouse unit which CAs and grantees alike can access whenever a particular kind of technical skill is sought. The clearinghouse can help match the specific resource to the specific need.

Institution Building

Recommendations

1. CAs, regardless of their specialization, ought to view institution-building as a legitimate area of concern and must take initiatives to assist grantees develop strong, enduring organizational structures, with good program planning, program implementation, evaluation, and financial management abilities. CAs
2. CAs can efficiently assist grantees with institution-building through coordinated provision of inputs. CAs

Information Sharing

Recommendations

1. CAs should routinely include in their funding documents (proposals) a section which lists what other CAs are funding the grantee, the amounts and purposes.	CAs
2. Feasibility studies and needs assessments done by a CA with a new institution should be freely shared with other CAs.	CAs
3. Trip reports should be routinely shared with other CAs working with a given institution.	CAs
4. Draft budgets and program proposals (grant documents) should be shared with other CAs routinely as part of the project development process.	
5. AID must (more actively and aggressively than it has been doing) initiate the routine distribution of the the following types of documents to help CAs in their planning and coordination.	S&T/Pop

- Country project papers (bilateral program descriptions)
- Country strategy statements
- Country evaluations and needs assessments
- Directory of CAs and technical resources available to CAs or grantees
- Trip reports of CAs deemed worthy of general distribution
- Periodic reports from the Population Projects Database

REPORT ON SELF SUFFICIENCY

EXECUTIVE SUMMARY

DEFINITION. SELF SUFFICIENCY IS DEFINED AS A CONDITION WHERE AN LDC PROJECT IS FREE OF FOREIGN DONOR SUPPORT. SELF SUFFICIENCY IS CONCEIVED AS A CONTINUUM IN WHICH VERY FEW PROJECTS CAN EVER REACH FULL SELF SUFFICIENCY BUT WHERE THE MAJORITY OF PROJECTS CAN GENERATE SOME PORTION OF THEIR NEEDS.

GOAL. THE GOAL IS TO MOVE PROJECTS ALONG THIS CONTINUUM AS FAR AS POSSIBLE WITHOUT SACRIFICING QUALITY SERVICES IN FAMILY PLANNING.

MEANS. THE MAJOR TECHNIQUES FOR GAINING SELF SUFFICIENCY ARE:

1. INCREASING MANAGEMENT CAPABILITY AND REDUCING COSTS.
2. CONTRACTING FOR SERVICES.
3. GENERATING INCOME.
4. DEVELOPING OTHER RESOURCES AND ASSETS.
5. FUND RAISING.

RECOMMENDATIONS

	ACTION RESPONSIBILITY
1. CAs and AID should develop simple methods to exchange information regarding AID's and CA's successful and unsuccessful income generation projects and their management. Such methods might include exchange of project documents and trip reports, one-to-one meetings, workshops, seminars, and visits to other CA's projects.	AID & CA's

2. Resource Development Activities:

- o AID should develop a clearly stated policy which allows the use of interest generated from AID funds to be used for program purposes. — AID
- o AID should issue a policy which clearly allows the CAs to finance the cost of organized fund raising campaigns by grantees.
- o AID should take steps to speed and facilitiate the review and approval process for vehicle waivers and should authorize CAs to allow subgrantees to purchase buildings.
- o AID should develop a policy which allows CAs to make loans to subgrantees with AID grant and loan funds.
- o AID should develop a policy which allows CAs to fund revolving funds for family planning program activities.

3. AID should provide CAs with information about organizations which provide assistance on income generation and cost containment. Information should also be provided regarding programs, such as those of the Bureau of Private Enterprise, which might assist with income producing schemes. — AID/S&T/POP

4. AID should provide CAs with lists of consultants (local and international) with expertise in income generation. — AID/S&T--POP

5. CAs should share information re: technical resources they have used with success. — CA's