

PN-ABH-003

REPORT ON COSTA RICA CINDE/PROCAP'S
PARTICIPANT TRAINING SYSTEM

**REPORT ON COSTA RICA CINDE/PROCAP'S
PARTICIPANT TRAINING SYSTEM**

Contract number OTR-0000-C-3483-00

Task Order Number 32

Submitted To:

**US AGENCY FOR INTERNATIONAL DEVELOPMENT
OFFICE OF DEVELOPMENT RESOURCES
BUREAU FOR LATIN AMERICA AND THE
CARIBBEAN, WASHINGTON, D.C.,**

August, 1985

EXECUTIVE SUMMARY

Background

In September of 1984 USAID/Costa Rica submitted for AID/W approval Project 515-0212, Training for Private Sector Development. The project is to be implemented by CINDE, the Costa Rican Coalition for Development Initiatives through its training arm, PROCAP. Over its five year life some 4,000 Costa Ricans, the majority from the private sector, will receive training both in-country and in the U.S.

Critical to the success of the project is having a system in place for monitoring the selection, placement, and follow-up of participants. CINDE/PROCAP, as implementing institution for the project, has the responsibility for the above functions and for reporting to USAID/Costa Rica on a timely basis so that relevant participant information can be incorporated into the Missions's participant information reporting to AID/W.

Since Project 515-0212 was designed and approved, a new Agency wide automated participant information reporting system has been developed--the Participant Training Management System (PTMS). This system, much more sophisticated and complete than what existed in the past, collects information on projects and participants trained under projects, which is to be sent by the AID Missions to AID/W. The PTMS was completed in July of 1985 and it is now installed in two overseas AID Missions. With its installation, PTMS will become the reporting mechanism which AID Missions will use to report to AID/W on the status of U.S. and third country participant training.

This report evaluates the information systems in place at CINDE/PROCAP for monitoring and reporting on in-country and U.S. training participants, as well as the compatibility between those systems and AID's participant information needs, both before the advent of PTMS and with the advent of PTMS. Another report prepared by Booz Allan Hamilton evaluates CINDE/PROCAP's managerial and organizational capabilities.

Report Findings

Overall, CINDE/PROCAP has devoted considerable time and effort to participant planning, tracking, and follow-up information. CINDE/PROCAP has in place a manual participant/project planning information system that is being used for in-country training and is responding adequately to the information needs of USAID/Costa Rica, and which were implicit in the project design. This system is in several respects more advanced than any system this evaluator has reviewed and/or seen in AID Missions--credit where it's due.

With the advent of PTMS, which introduces a much more sophisticated information reporting system that AID Missions have known in the past, the system established for the management of Project 522-0212 should be expanded and improved in order to make it compatible with USAID/Costa Rica's increased participant information reporting requirements. CINDE/PROCAP intends to use a computerized management system compatible with USAID/Costa Rica's needs, and has indicated an interest in and willingness to install PTMS. There are significant advantages to both CINDE/PROCAP and USAID/Costa Rica to start modifying PTMS for in-country information handling and install it for U.S. training, which are spelled out in the report.

Assuming procurement activities for the U.S. training component of Project 515-0212 are re-initiated, and if CINDE/PROCAP installs a computerized participant management information system containing the data included in the AID PTMS, it should be able to effectively manage the future U.S. training program under the Project.

This report identifies aspects of CINDE/PROCAP's current manual system which are operating effectively and pinpoints a few areas where the present system will need to be modified and upgraded in order to meet USAID/Costa Rica's information needs once the latter has installed PTMS.

Finally, CINDE/PROCAP, as presently organized and managed, is capable of managing the various information aspects of participant tracking. CINDE/PROCAP has a diverse and unusual training management program, and its efforts to manage the information requirements of such a program deserve close attention from other AID contractors around the world in similar situations. CINDE/PROCAP should be considered a pilot project by USAID for use of the first automated participant training management system by a contractor in a developing country.

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I. INTRODUCTION

An evaluation of the Costa Rican Coalition for Development Initiatives (CINDE) training arm, the Private Sector Training Project (PROCAP) participant management information systems was carried out by Dr. Robert Schwere (senior technical staff member of Computer Data Systems, Inc. and designer of the USAID Participant Training Management System), at the request of the USAID/LAC Bureau. Under AID Project 515-0212, CINDE/PROCAP will be responsible for monitoring the selection, placement, and follow-up activities of over 4,000 Costa Ricans who will receive training both in-country and in the U.S. over a five-year period. The U.S. training component of Project 515-0212 has been put on hold pending an external evaluation.

This evaluation seeks to determine what steps CINDE/PROCAP has taken and proposes to take to install a participant information system that will serve both the needs of the USAID/Costa Rica Mission's tracking of participant training activities, and CINDE/PROCAP's training activities over time, as it continues training activities on its own beyond the life of the project.

Also, given the recurring participant training problems that USAID's Office of International Training and USAID's Missions encounter, attention to CINDE/PROCAP's capabilities in participant management is advisable before project implementation. This aspect is being evaluated by Booz Allan Hamilton under a separate contract.

A. Scope of Work

The evaluation seeks to answer the following questions:

1. Existing Information System For In-Country Training

A. What kind of system does CINDE/PROCAP use to record

information on participants?

- B. Is the information collected adequate for CINDE/PROCAP's and USAID/Costa Rica's needs, and is it being obtained on a timely basis?

2. Information System For U.S. Training

- A. What steps has CINDE/PROCAP taken to install a tracking system, and how far along is the installation?
- B. Is the system responsive to CINDE/PROCAP's and USAID/Costa Rica's participant training information needs?

3. Information Management Capabilities

- A. Is the system being adequately supported in terms of materials and equipment?
- B. Have adequate provisions been made for dedicated time of staff to input data into the system?
- C. Does CINDE/PROCAP currently have staff with the appropriate qualifications to manage the system, and, if not, has it made provisions to obtain appropriate staff?

4. Recommendations

- A. How could the information systems be improved to meet, if necessary, CINDE/PROCAP's and USAID/Costa Rica's participant information needs?
- B. What modifications to existing information handling systems could be undertaken to meet participant information needs?

B. Methodology

From July 27 to August 1, 1985, Robert Schware conducted interviews with key personnel of CINDE/PROCAP and the USAID/Costa Rica Mission (see Appendix 1 for list of persons contacted). He also examined all the relevant CINDE/PROCAP files, including procedures and regulations for implementing short and long-term training in Costa Rica and the U.S., and all of the available forms for selecting, processing, and following-up participants.

C. Findings

This section responds summarily to each question in the Scope of Work section above, and then summarizes the general conclusions of the evaluation. The reader is referred to Sections II and III for more detailed information.

1. Existing Information System For In-Country Training

- A. What kind of system does CINDE/PROCAP use to record information on participants?

It has manual records on all participants (see for example Appendix 4, Pre-Course Form). It also has evaluation forms that each participant fills out for the short-term course s/he has taken (see Appendix 5, Course Evaluation Form). Finally, CINDE/PROCAP has prepared a participant follow-up form to be filled out six months and a year after training by each participant (see Appendix 6, Follow-Up Form). The latter has not been used because in-country training began in March 1985 and six months have not elapsed.

- B. Is the information collected adequate for CINDE/PROCAP's and USAID/Costa Rica's needs, and is it being obtained on a timely basis?

CINDE/PROCAP sends quarterly reports to USAID/Costa Rica on its in-country training activities. These contain information on the course or seminar, sector, number of participants trained, date and duration, and financial data (see Appendix 7). The reports do not contain information on each participant. The in-country reports were viewed by USAID/Costa Rica as adequate to its information needs. The reports could, however, be tailored to include more summary statistical data. In terms of U.S. training, CINDE/PROCAP's present system will not meet all of the information needs of USAID/Costa Rica when the latter installs PTMS. However, until that time the information is adequate for CINDE/PROCAP and the Mission.

2. Information System For U.S. Training

- A. What steps has CINDE/PROCAP taken to install a tracking system, and how far along is the installation?

Aspects of a participant information system have been developed by CINDE/PROCAP for planning, selecting, and following-up participants sent to the U.S. for short or long-term training. An analysis of each of those steps and their strengths and weaknesses is provided in section III below. The system has not been implemented because of a temporary delay on procurement actions on the training component of Project 515-0212, pending an external evaluation.

- B. Is the system responsive to CINDE/PROCAP's and USAID/Costa Rica's participant training information needs?

The system has not been implemented yet, as mentioned above. As soon as USAID/Costa Rica installs PTMS, CINDE/PROCAP's present manual information system will not meet all of the Mission's needs, unless CINDE/PROCAP installs a compatible system. CINDE/PROCAP has expressed considerable interest in installing an automated system like PTMS, and it has the personnel capable of managing the computerized information system.

3. Information Management Capabilities

- A. Is the system being adequately supported in term of materials and equipment?

CINDE/PROCAP has on order the following:

1. A Wang Professional Computer with one floppy disk drive and one 10 megabyte hard disk.
2. A Wang printer, model PC-PMC12.
3. A BASIC interpreter software package.

This hardware and software may be adequate for a computerized management system CINDE/PROCAP develops to monitor and report on participants sent to the U.S. for training. But it is not yet completely adequate to run a system like PTMS. Some additional hardware and software must be purchased, which is outlined in section III.E. below.

- B. Have adequate provisions been made for dedicated time of staff to input data into the system?

PROCAP Program Manager, Clara Zomer, intends to hire a full-time staff assistant to plan and manage the participant information system, to handle ad hoc clerical problems that may arise during participant processing and follow-up, and to assist with voucher disbursement requests for participants.

- C. Does CINDE/PROCAP currently have staff with the appropriate qualifications to manage the system, and, if not, has it made provisions to obtain appropriate staff?

The current staff is appropriately qualified to manage the system.

4. Recommendations

- A. How could the information systems be improved to meet, if necessary, CINDE/PROCAP's and USAID/Costa Rica's participant information needs?

CINDE/PROCAP should consider modifying and enhancing PTMS to meet its participant information needs for in-country and U.S. training needs and be compatible with USAID's PTMS. The required changes are listed in section III.B. below. CINDE/PROCAP has expressed a willingness to make the necessary modifications.

- B. What modifications to existing information handling systems could be undertaken to meet participant information needs?

CINDE/PROCAP should enhance its existing manual file system organized by courses by keeping separate files for participants, instructors, and firms.

General conclusions of the evaluation: First, managing participant training is a very complex process. AID as an Agency has had recurring problems in the following areas: meeting project start and completion dates; unqualified participants being sent for training; inadequate and non-existent follow-up; and lack of control and information from participant training contractors. It would be naive to think that CINDE/PROCAP will not face one or more of these problems in the future. CINDE/PROCAP may be able to avoid and/or minimize some of these problems by automating their in-country participant training management system, by installing such a system for U.S. trained participants, and by requiring contractors responsible for U.S. training to use their system to report on participants in training.

Second, some aspects of CINDE/PROCAP's present manual system for participant management are substantially more advanced than many information systems in place in USAID missions. For example, CINDE/PROCAP has set-up a

long-range training plan for participants that duplicates the quarterly-based country training plan developed for PTMS, which will lay-out the estimated number of participants planned for training over the life of a project (see Appendix 2, Long-Range Training Plan). It also has developed follow-up forms and questionnaires to provide information on participants 6 months and 1 year after training.

Third, CINDE/PROCAP, as presently organized and managed, is capable of managing the various information aspects of participant tracking. However, it should have an automated system to be responsive to USAID/Costa Rica's participant training information needs, and to effectively manage its own needs over time.

Fourth, the USAID PTMS generally fits the needs of CINDE/PROCAP, but CINDE/PROCAP would be forced to adapt to the limitations of PTMS unless modifications are made in the existing system particularly for in-country training.

D. Recommendations

Critical to the success of the CINDE/PROCAP project will be an adequate management information system to monitor selection, placement, and follow-up activities of participants, as well as to plan future training and easily change planning estimates. Based on the findings of the evaluation, the following recommendations are made. They are divided into immediate and long-term recommendations.

1. Immediate

- CINDE/PROCAP should hire one full-time staff assistant to work on participant tracking and follow-up, to handle ad hoc clerical problems that may arise during participant processing and follow-up, and to assist with voucher disbursement requests.
- CINDE/PROCAP should enhance its existing manual file system organized by courses by keeping separate files for participants, instructors, and firms.
- CINDE/PROCAP should request the PTMS package from AID/OIT and/or AID/IRM, request advice for modifying PTMS for its in-country training needs, and install the system.
- USAID/Costa Rica should arrange with CINDE/PROCAP procedures and schedules to transfer project and participant files used with PTMS.

2. Long-term (3 months - 1 year)

- CINDE/PROCAP has a diverse and unusual training management program, and its efforts to manage the information requirements of such a program deserve close attention from other AID contractors around the world in similar situations. CINDE/PROCAP should be considered a pilot project by USAID for use of the first automated participant training management system by a contractor in a developing country.
- CINDE/PROCAP should consider modifying and enhancing PTMS to meet its participant information needs for in-country and U.S. training needs and be compatible with AID's PTMS. The required changes are listed in section III.B. below.

CINDE/PROCAP should consider setting-up an easy-to-use automated decision table information system to aid in decision making regarding participant and firm selection. Another table should be designed to record questionnaires filled out by participants regarding courses. Both of these could be programmed using Lotus 1-2-3. It would take a competent 1-2-3 programmer no more than 15 working days, including instruction in how to use the system.

CINDE/PROCAP should consider creating selection and follow-up criteria specific to U.S. candidates and participants in short-term and long-term training programs, and also for participants in the university, private, and public sectors. This would entail adding a few data fields to existing forms.

USAID and CINDE/PROCAP should require contractors track participants in the U.S. with an automated system similar to its own. This will allow CINDE/PROCAP to update participant files electronically. It will help ensure that contractors provide CINDE/PROCAP with training information useful to its own training information needs as well as to AID's.

CINDE/PROCAP should consider re-defining the job descriptions for the people who will be working on any computerized participant tracking and planning system. This will help ensure that in the future these persons will be evaluated by appropriate criteria.

II. IN-COUNTRY PARTICIPANT INFORMATION SYSTEM

A. Training Plan, Amount of Training

Over the period between 1985 and 1989 CINDE/PROCAP is planning to manage the training of the following number of participants by sector:

| <u>Sector</u> | <u>Estimated Participants</u> |
|----------------------------|-------------------------------|
| Private | 2,200 |
| Private Financial | 740 |
| Central Bank of Costa Rica | 360 |
| University | 260 |
| University (Electronics) | 440 |

By USAID Mission standards, this is an extremely large number of participants to select, process, and follow-up. A well-planned and significant management role for CINDE/PROCAP will be necessary to achieve stated goals for participant training information management, and to avoid the recurring problems USAID has faced--over many years--which has limited the effectiveness of its participant training program.

An indication of the potentially large and growing training initiative is the fact that CINDE/PROCAP had selected 100 more participants in the Private Sector as of June 1985 than it planned for the entire year (see Appendix 3). This demonstrates at least one instance in which there were not only sufficient numbers of candidates available, but more than anticipated. It has manual records on all participants (see Appendix 4, Pre-Course Form). It also has evaluation forms that each participant fills out for the short-term course s/he has taken (see Appendix 5, Course Evaluation Form). Finally, CINDE/PROCAP has prepared a participant follow-up form to be filled

out six months and a year after training by each participant (see Appendix 6, Follow-Up Form). The latter has not been used yet, because in-country training started in March 1985 and no participants have been sent to the U.S. for training.

B. Reports

CINDE/PROCAP sends quarterly reports to USAID/Costa Rica on its in-country training activities. These contain information on the course or seminar, sector, number of participants trained, date and duration, and financial data (see Appendix 7). The reports do not contain information on each participant. The in-country reports were viewed by USAID/Costa Rica as adequate to its information needs. These reports could, however, be tailored to include more summary statistical data. As presently designed, the reports for U.S. training will not meet all of the information needs of the USAID PTMS, which the Costa Rica Mission will be using soon.

III. U.S. PARTICIPANT INFORMATION SYSTEM

A. Existing Information System

Aspects of a participant information system have been developed by CINDE/PROCAP for planning, selecting, and following-up participants sent to the U.S. for short or long-term training. An analysis of each of those aspects and their strengths and weaknesses is provided below.

Planning

A quarterly-based, long-range training plan has been developed which lays out the estimated number of participants for each sector (see Appendix 2). This is an excellent plan, which is incorporated into the automated PTMS.

Selection

Participants are selected from companies that are first rated by CINDE/PROCAP according to type of product, value of annual exports, number of employees, etc. (see Appendix 8). Next, candidates are rated according to their employer's ranking length of work experience, familiarity with English, and educational background (see Appendix 9). The selection criteria at present are the same for all U.S. candidates, whether they are applying for short-term or long-term programs in the university, private or banking sectors. This could be refined in the future, but should be done so with the firm or firms contracted to handle U.S. participant training.

Follow-Up

The same follow-up forms developed for in-country training exist for U.S. training (See Appendix 5 and 6). These cover firms and participants. The latter are followed-up for 6 months and 1 year after training. To date, no follow-up forms have been filled out by firms or by participants. This is because in-country training started in March 1985.

The participant follow-up form contains both basic data (for example, position and salary before and after training), and subjective information about the content of the training and how the training benefits the participant.

The follow-up form would provide useful information for future participant training evaluation efforts. However, this information could be more valuable if the forms were re-designed and new data fields added for participants on short-term or long-term programs as well as by sector. The follow-up information from the two present forms could not be transferred into PTMS without modifications to the system. PTMS allows for more basic data

elements about participant follow-up that would provide USAID with information needed to monitor the overall program. However, PTMS does not contain any data fields to capture comments on the benefits and/or inadequacies of training by participants, or, on salary information before and after training. These are limitations of PTMS insofar as CINDE/PROCAP's needs are concerned.

B. AID's PTMS and CINDE/PROCAP

AID is increasingly emphasizing all aspects of participant training. This means that training officers, program officers, and project managers will have to manage programs that are larger, more complex, and more difficult to document. The Participant Training Management System (PTMS) was designed by AID to help meet these future problems. PTMS has been installed in USAID Missions in Panama and El Salvador to date. Other Missions (including Costa Rica) will be installing PTMS in due course.

PTMS will provide current and complete information on:

- a) the number of participants pending training;
- b) the number of participants being trained;
- c) the location, departure to and departure from training country for participants;
- d) the contractors who train participants; and,
- e) participants before, during, and after training.

For training officers and program managers, it is obvious that PTMS will be an advance in the way participants are managed over the life of projects. PTMS was given a positive review by Clara Zomer (PROCAP) and William Binford (USAID/Costa Rica). Specifically, they reported that the system not only provides essential and timely reports on participant planning, processing, and follow-up, but also enables users to efficiently manage a large number of participants.

PTMS is a sophisticated, automated advance in participant information management, compared with the manual system CINDE/PROCAP is planning for U.S. participants and the current system in place at USAID/Costa Rica. Officials at both CINDE/PROCAP and USAID/Costa Rica view the availability of PTMS as an opportunity to better update participant planning estimates, track participants, and produce reports needed for the USAID/Costa Rica Mission.

Using PTMS would be a major step forward for CINDE/PROCAP as well as for USAID/Costa Rica. However, the current version of the PTMS will not meet all of their short and long-term information needs. To provide CINDE/PROCAP with a revised version of PTMS it is recommended that consideration be given to accomplishing the task of additional programming, testing, and training.

There are significant advantages for USAID/Costa Rica if these modifications are made. First, its training office will be able to obtain U.S. participant information directly from CINDE/PROCAP's PTMS, which will minimize data-entry time. Second, it will be able to obtain timely information on CINDE/PROCAP's in-country training efforts.

The total time required to modify the PTMS in dBase III, test all changes in computer programs for accuracy and completeness, alter user manuals and attendant forms, and install the system at CINDE/PROCAP should not exceed 30 working days for a competent programmer and a systems analyst/trainer.

C. Data Analysis

A detailed analysis of each piece of information that can go into the PTMS revealed certain unnecessary items and some unfulfilled information needs mostly in in-country monitoring of participants and programs. As a starting point to any future re-programming of PTMS for CINDE/PROCAP, the following list proceeds from unnecessary data elements to suggested new ones and changes to existing elements. Both are derived from discussions with key PROCAP officials responsible for training planning and implementation.

1. Unnecessary Data Elements

| <u>Applied TO:</u> | <u>PTMS File Name/Screen</u> | <u>Item</u> | <u>Action</u> |
|--------------------|------------------------------|----------------------------|---------------|
| In-Country | Participant/Processing | ALIGU | Delete |
| In-Country | Participant/Processing | TOEFL | Delete |
| In-Country | Participant/Processing | Other Test | Delete |
| In-Country | Participant/Processing | Y/N Checklist, 14 items | Delete |
| In-Country | Part./Processing, Training | Training Country Code/Name | Delete |
| In-Country | Part./Processing, Training | Contractor Code/Name | Delete |
| In-Country | Follow-up/Follow-up | Province or State | Delete |
| In-Country | Participant/Processing | Return Date | Delete |
| In-Country | Participant/Processing | No. Letters Sent | Delete |
| In-Country | Participant/Processing | Questionnaire No. | Delete |
| In-Country | Participant/Processing | Degree Earned | Delete |
| In-Country | Participant/Processing | Documents PCHD Date | Delete |
| In-Country | Participant/Processing | Est. Call Forward Date | Delete |
| In-Country | Participant/General | Middle Initial | Delete* |
| In-Country | Participant/General | Province or State | Delete |
| In-Country | File Maintenance | Password | Delete |
| In-Country | Project/LOP,CTP | Country Code/Name | Delete |
| In-Country | Project/LOP,CTP | Type of Funding | Delete |
| In-Country | Project/LOP,CTP | PIO/P Number | Delete |
| In-Country | Project/LOP,CTP | PIO/P Amount | Delete |

*And delete as key to other pertinent files.

2. Suggested New Data Elements and Changes

| <u>Applied TO:</u> | <u>PTMS File Name/Screen</u> | <u>Item</u> | <u>Action</u> |
|--------------------|------------------------------|---|--|
| US, In-Country | All files/All screens | Dates | Change to DD/MM/YY format |
| US, In-Country | LOP | Est. # Parts | Expand field to 999 |
| US, In-Country | LOP and CTP/LOP,CTP | APORTE PROCAP ESF | Add numeric field to 99999 |
| US, In-Country | LOP and CTP/LOP,CTP | APORTE CONTRAPARTIDA | Add numeric field to 999999 |
| US, In-Country | LOP and CTP/LOP,CTP | COSTO TOTAL | Add numeric field to 99999 |
| US, In-Country | Participant/General | Trip number | Change to "Course" Number |
| US, In-Country | Participant/Processing | Salary | Add numeric field to 99999 |
| US, In-Country | Participant/Processing | Y/N Checklist | Add alpha fields for "Application Form?", "Payment?", "Admitted to Course?" |
| US, In-Country | Participant/Processing | Selection Criteria (See Appendix 11) | Add numeric fields to 999 for "La Empresa", "Experiencia", "Ingles", "Nivel Education" |
| US, In-Country | Participant/Training | Instructor | Add alpha fields for Instructor Name, numeric field for Code |
| US, In-Country | Participant/Training | Depart Date | Change to "Course, Start" Date |

| | | | |
|----------------|----------------------|----------------|--|
| US, In-Country | Participant/Training | Est Compl | Change to "Course, Compl" Date |
| US, In-Country | Follow-Up | PO Box | Add numeric field to 999999999999 |
| US, In-Country | Follow-Up | Interview | Change to "1st Questionnaire Date |
| US, In-Country | Follow-Up | 1st Letter Due | Change to "2nd Questionnaire Date |
| US, In-Country | Follow-Up | Next Ltr Due | Change to "3rd Questionnaire "Date" |
| US, In-Country | Follow-Up | Letter Sent | Change to Reply to 1st Questionnaire Date |
| US, In-Country | Follow-Up | Reply Rec'd | Change to "Reply to 2nd Questionnaire Date |
| US, In-Country | Follow-Up | Follow-up End | Change to Reply to 3rd Questionnaire Date |
| US, In-Country | Follow-Up | Salary | Add numeric field to 99999 |
| US, In-Country | Follow-Up | All Items | Change into Spanish |

An illustration of the suggested deletions, additions, and changes for in-country tracking is provided in Appendix 10. It does not contain all changes that should be made into Spanish.

D. Systems Users: Technical Capabilities, Additional Staff

Participant training processing and planning is affected most directly by four persons at CINDE/PROCAP: Ing. Clara Zomer, Sr. Avi Aviram, Sra. Guiselle Mora, and Sr. Roberto Lizano. The qualifications of these persons have been assessed in Development Associate's "Final Report on the Institutional Assessment of CINDE's Experience with AID and its Participation in the Training for Private Sector Development Project," Project No. 515-0000.3,

AID, San Jose, Costa Rica, February 1985. That assessment did not include information on PROCAP's personnel qualifications for using computers in management settings, which is summarized below.

The Program Manager for PROCAP, Clara Zomer, was Director of the Computer Center at the University of Costa Rica, 1968-1971. Avy Aviram, a Training Specialist for the Private Sector, has taken a graduate course in Basic programming at the University of Florida, 1982. The Training Specialist for the banking and finance component of PROCAP, Guiselle Mora, has taken a recent course in computers in management, as part of her MBA program. Roberto Murillo, the training Specialist for the Public Sector, took a course on microcomputers offered by the Government of Costa Rica's Office of Technical Management, back in 1976.

In addition, two PROCAP staff assistants have taken introductory courses on using the Wang Professional Computer (PC). There thus appears to be a general capability and intelligence among the PROCAP personnel of computers, and the uses of computers in information management. It is recommended that all the staff take a course on how to use the Wang PC.

An additional, full-time staff assistant for PROCAP is recommended to assist the staff mentioned above in planning and managing the participant information system, to handle ad hoc clerical problems that may arise during participant processing and follow-up, and to assist with voucher disbursement requests for participants. CINDE/PROCAP intends to hire this assistant.

The current job descriptions for the people who will be working on the computer applications for participant training should be re-defined. This will help ensure that in the future these persons will be evaluated by appropriate criteria. The job description for the new person should include a familiarity with using the Wang PC.

E. Hardware and Software Requirements

CINDE/PROCAP intends to use a computerized management system compatible with USAID/Costa Rica's needs. Accordingly, it has on order the following:

1. A Wang Professional Computer with one floppy disk drive and one 10 megabyte hard disk.
2. A Wang printer, model PC-PM012.
3. A BASIC interpreter software package.

This hardware and software may be adequate for a computerized management system CINDE/PROCAP develops to monitor and report on participants sent to the U.S. for training. But it is not yet completely adequate to run a system like PTMS. Some additional hardware and software must be purchased, which is outlined in section III.E. below. If it decides to use or modify PTMS, CINDE/PROCAP will need to order the following:

1. An IBM PC Monochrome Emulation Option for the Wang Professional Computer.
2. A disk operating system, either PC-DOS or MS-DOS, version 2.0 or greater.
3. The dBase III software package version 1.1 or greater.
4. The PTMS disks (available from AID/S&T/IT or AID/SER/M/IRM, Washington, D.C.).

CINDE/PROCAP should also:

1. Check to be sure the printer on order is a wide carriage printer. If not, it should order the Wang PC-PM016 model.
2. Consider ordering the LOTUS 1-2-3 software package to use in evaluating and selecting firms and participants.

APPENDIX 1 LIST OF PERSONS CONTACTED

CINDE/PROCAP

Clara Zomer, manager, PROCAP
Guiselle Mora, Assistant Manager, PROCAP
Avi Aviram, Assistant Manager, PROCAP
Roberto Linzano, Assistant manager, PROCAP

USAID/Costa Rica

William Binford, Project Advisor to PROCAP
John Swallow, Chief, Training Unit
Lorraine Simard, Program Officer
Ann Farrarr, Evaluation Officer
Inez de Rodriguez, Training Officer
Patricia Monge, Administrative Officer

USAID/Washington

Paul White, LAC
Marshia Bernbaum, LAC

APPENDIX 2 LONG RANGE TRAINING PLAN

Long-Term Training Plan (U.S.)

| Sector Class. | 1985 | | | | | 1986 | | | | | 1987 | | | | | 1988 | | | | | 1989 | | | | | |
|------------------------|------------|---|----|----|-----|------|----|----|----|----|------|----|----|----|----|------|----|----|----|----|------|----|----|----|----|-----|
| | 1 | 2 | 3 | 4 | T | 1 | 2 | 3 | 4 | T | 1 | 2 | 3 | 4 | T | 1 | 2 | 3 | 4 | T | 1 | 2 | 3 | 4 | T | T |
| | SHORT TERM | | | | | | | | | | | | | | | | | | | | | | | | | |
| TRAINEES | | | 1 | 2 | 3 | 1 | 1 | 1 | 1 | 4 | 2 | 2 | 1 | 1 | 6 | 2 | 2 | 1 | 1 | 6 | 1 | 1 | 1 | 1 | 4 | 23 |
| g Private es | | | 14 | 26 | 40 | 15 | 15 | 15 | 15 | 60 | 26 | 26 | 14 | 14 | 80 | 26 | 26 | 14 | 14 | 80 | 15 | 15 | 15 | 15 | 60 | 320 |
| BCCR TRAINEES | | | 3 | 3 | 6 | 2 | 2 | 2 | | 6 | 2 | | 2 | 2 | 6 | 2 | 2 | 2 | | 6 | 2 | | 2 | 2 | 6 | 30 |
| | | | 2 | 2 | 4 | 2 | 1 | 1 | 1 | 5 | 1 | 1 | 1 | 1 | 4 | 1 | 1 | 1 | 1 | 4 | 1 | 1 | 1 | 1 | 4 | 21 |
| LONG TERM | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ities s | | | 5* | | | | | | | | | | | | | | | | | | | | | | | |
| ad OJT s | | | | 5 | 11* | | | | 11 | 4 | | | | 4 | | | | | 4 | | | | | | 20 | |
| Term Dev.U. y Trainees | | | 15 | 15 | | | | 11 | 11 | | 6 | 2 | 2 | 11 | 3 | | | | 4 | 14 | 4 | | | 1 | 4 | 20 |
| Graduate es | | | 2 | 2 | 3 | | | | 3 | 2 | | | | | | | | | | 4 | 4 | | | | | 37 |
| rad.OJT es | | | | | | | | | | | | | 2 | 3 | | | | | | 3 | | | | | | 10 |
| | | | | | | | | | | | 2 | | 3 | 5 | 2 | | | | | 2 | | | | 3 | 3 | 10 |

240

D and 2 Ms.
D and 8 Ms.

APPENDIX 3 OVERALL TRAINING PLAN

APPENDIX 4 PRE-COURSE FORM

SOLICITUD DE INSCRIPCION

NOMBRE DEL CURSO O SEMINARIO:

NOMBRE DEL PARTICIPANTE:

CEDULA:

DIRECCION Y TELEFONO:

CARGO DESFEMPEÑADO:

SALARIO:

EMPRESA:

ACTIVIDAD:

DIRECCION, TELEFONO Y APARTADO:

ESTUDIOS FORMALES REALIZADOS

| NIVEL | GRADO OBTENIDO | TITULO | PROFESION |
|----------------|----------------|--------|-----------|
| PRIMARIOS | | | |
| SECUNDARIOS | | | |
| UNIVERSITARIOS | | | |
| TECNICOS | | | |
| COMERCIALES | | | |
| OTROS | | | |

CURSOS DE ADIESTRAMIENTO RECIBIDOS:

| CURSO | CENTRO DE CAPCTN. | DURACION | FECHA |
|-------|-------------------|----------|-------|
| | | | |
| | | | |
| | | | |
| | | | |

DESCRIPCION DEL CARGO:

Empty space for description of the job position.

INDIQUE LAS DIFICULTADES QUE ENCUENTRA EN LA EJECUCION DE SU TRABAJO

Empty space for difficulties encountered in job execution.

Handwritten signature

SEÑALE LAS AREAS EN QUE LE SERIA MAS UTIL CAPACITARSE

¿COMO CREE QUE ESTE CURSO PUEDE BENEFICIARLE DIRECTAMENTE A USTED?

¿COMO CREE QUE ESTE CURSO PUEDE BENEFICIAR A LA EMPRESA?

PAGO POR MEDIO DE:

/ / CHEQUE NUMERO:

BANCO:

/ / EFECTIVO

SALARIOS TRANSPORTE Y SIMILARES CORREN POR CUENTA DE LA EMPRESA

A INTERES DE LA EMPRESA EL PARTICIPANTE GARANTIZA SUS SERVICIOS POR UN PERIODO NO MENOR A UN AÑO

FIRMA:

FECHA:

PARA USO DE PROCAP

COSTO POR PARTICIPANTE: \$ (\$):

APORTE EMPRESA: \$ (\$):

APORTE CINDE: \$ (\$):

CATEGORIA DE SELECCION (VER FORM INT 6A o 6B)

CATEGORIA

PUNTAJE

CATEGORIAS: A (100PTOS)-B(75 PTOS). C(50 PTOS)-D(25PTOS)

X

APPENDIX 5 COURSE EVALUATION FORM

EVALUATION FORM OF SEMINAR
By PARTICIPANT

EVALUACION DEL ADIESTRAMIENTO

SE SOLICITA AL PARTICIPANTE, LLENAR ESTE FORMULARIO CON LA MAYOR OBJETIVIDAD.
LA INFORMACION SERA ABSOLUTAMENTE CONFIDENCIAL, Y SERVIRA PARA MEJORAR LAS ACTIVIDADES
DEL ADIESTRAMIENTO IMPARTIDO. NO ES NECESARIO ESCRIBIR SU NOMBRE.

NOMBRE DE LA ACTIVIDAD:

FECHA:

MARQUE CON UNA X LA CASILLA QUE CORRESPONDE A SU OPINION, DE ACUERDO CON LA SIGUIENTE CLA
VE: D-DEFICIENTE, R -REGULAR, B-BUENO, MB-MUY BUENO, E-EXCELENTE

| | D | R | B | MB | E |
|---|---|---|---|----|---|
| A. LA ACTIVIDAD EN GENERAL | | | | | |
| 1. CUMPLIMIENTO DE OBJETIVOS | | | | | |
| 2. CUMPLIMIENTO DEL PROGRAMA | | | | | |
| 3. CONTENIDO DE LA ACTIVIDAD | | | | | |
| 4. SUMINISTRO DE MATERIALES | | | | | |
| 5. TRATO PERSONAL | | | | | |
| B. LA INSTRUCCION EN PARTICULAR | | | | | |
| 1. METODOS DE ENSEÑANZA | | | | | |
| 2. AYUDAS AUDIO-VISUALES | | | | | |
| 3. MATERIAL DIDACTICO IMPRESO | | | | | |
| 4. NUMERO DE HORAS Y DE EXPOSICIONES | | | | | |
| 5. METODO DE EVALUACION | | | | | |
| C. AMBIENTE FISICO | | | | | |
| 1. VENTILACION | | | | | |
| 2. ILUMINACION | | | | | |
| 3. MOBILIARIO | | | | | |
| 4. INSTALACIONES SANITARIAS | | | | | |
| 5. LIMPIEZA Y ORDEN DEL LOCAL | | | | | |
| 6. PROTECCION CONTRA RUIDOS | | | | | |
| 7. SERVICIOS ADICIONALES (TELEFONO, REFRIGERIOS, OTROS) | | | | | |

Handwritten mark

D LOS INSTRUCTORES

| a. NOMBRE DEL INSTRUCTOR: | D | R | B | MB | E |
|--|---|---|---|----|---|
| 1. CONOCIMIENTO DE LA MATERIA | | | | | |
| 2. CAPACIDAD PARA CONDUCIR GRUPOS DE TRABAJO | | | | | |
| 3. MANERA DE EXPONER, INTERES QUE SUSCITA | | | | | |
| 4. ATENCION DE PREGUNTAS Y CONSULTAS | | | | | |
| 5. PUNTUALIDAD | | | | | |
| b. NOMBRE DEL INSTRUCTOR: | D | R | B | MB | E |
| 1. CONOCIMIENTO DE LA MATERIA | | | | | |
| 2. CAPACIDAD PARA CONDUCIR GRUPOS DE TRABAJO | | | | | |
| 3. MANERA DE EXPONER, INTERES QUE SUSCITA | | | | | |
| 4. ATENCION DE PREGUNTAS Y CONSULTAS | | | | | |
| 5. PUNTUALIDAD | | | | | |
| c. NOMBRE DEL INSTRUCTOR: | D | R | B | MB | E |
| 1. CONOCIMIENTO DE LA MATERIA | | | | | |
| 2. CAPACIDAD PARA CONDUCIR GRUPOS DE TRABAJO | | | | | |
| 3. MANERA DE EXPONER, INTERES QUE SUSCITA | | | | | |
| 4. ATENCION DE PREGUNTAS Y CONSULTAS | | | | | |
| 5. PUNTUALIDAD | | | | | |
| d. NOMBRE DEL INSTRUCTOR: | D | R | B | MB | E |
| 1. CONOCIMIENTO DE LA MATERIA | | | | | |
| 2. CAPACIDAD PARA CONDUCIR GRUPOS DE TRABAJO | | | | | |
| 3. MANERA DE EXPONER, INTERES QUE SUSCITA | | | | | |
| 4. ATENCION DE PREGUNTAS Y CONSULTAS | | | | | |
| 5. PUNTUALIDAD | | | | | |
| e. NOMBRE DEL INSTRUCTOR: | D | R | B | MB | E |
| 1. CONOCIMIENTO DE LA MATERIA | | | | | |
| 2. CAPACIDAD PARA CONDUCIR GRUPOS DE TRABAJO | | | | | |
| 3. MANERA DE EXPONER, INTERES QUE SUSCITA | | | | | |
| 4. ATENCION DE PREGUNTAS Y CONSULTAS | | | | | |
| 5. PUNTUALIDAD | | | | | |

1. INDIQUE SI LOS CONOCIMIENTOS ADQUIRIDOS SON O NO SON APLICABLES A LAS LABORES QUE DESEMPEÑA O VA A DESEMPEÑAR SI NO

II ASPECTOS MAS IMPORTANTES DE LA ACTIVIDAD:

III ASPECTOS MENOS RELEVANTES:

IV TEMAS QUE PODRIAN INCLUIRSE O AMPLIARSE:

V OTRAS SUGERENCIAS:

APPENDIX 6 FOLLOW-UP FORM: FIRM AND PARTICIPANT

SEGUIMIENTO A PARTICIPANTES 6 MESES Y UN AÑO DESPUES DE CAPACITACION

NOMBRE DE LA EMPRESA:

NOMBRE DEL PARTICIPANTE:

CURSO RECIBIDO:

FECHA:

CARGO ANTERIOR AL CURSO:

SALARIO ANTERIOR AL CURSO:

SALARIO POSTERIOR AL CURSO:

I. ¿CREE USTED QUE LA CAPACITACION CUMPLIO LOS OBJETIVOS ESTIPULADOS?

II. SEÑALE LAS AREAS EN QUE LE FUE MAS UTIL CAPACITARSE.

III. ¿COMO CREE QUE LA EMPRESA SE BENEFICIO POR SU PARTICIPACION?

IV. ¿EN QUE OTRAS AREAS CONSIDERA QUE DEBE RECIBIR MAS CAPACITACION?

SEGUIMIENTO DE CAPACITACION

A. DATOS DE LA EMPRESA

NOMBRE:

DIRECCION:

APARTADO:

TELEFONO:

TELEX:

B. DATOS DE PARTICIPANTES CAPACITADOS Y CURSOS RECIBIDOS

| NOMBRE | ACTIVIDAD | FECHA |
|--------|-----------|-------|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |
| 6. | | |
| 7. | | |
| 8. | | |

C. CAMBIOS DEL PARTICIPANTE DESPUES DE LA CAPACITACION

| PARTIC. # | CARGO ANTERIOR | CARGO ACTUAL | VARIACION SALARIAL U OTROS | | CAPACITACION EFECTIVA | |
|--------------|----------------|--------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| | | | <input type="checkbox"/> SI | <input type="checkbox"/> NO | <input type="checkbox"/> SI | <input type="checkbox"/> NO |
| 1. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

D. CAMBIOS EN LA EMPRESA DESPUES DE CAPACITACION

I N D I C E

MAYOR MENOR IGUAL

1. VOLUMEN DE EXPORTACIONES

2. PRODUCTIVIDAD

3. CALIDAD

4. MANTENIMIENTO DE EQUIPO Y MAQUINARIA

5. COSTOS OPERATIVOS

6. MERCADEO

7. MOTIVACION DEL PERSONAL

8. INICIATIVAS DEL PERSONAL

9. ROTACION DEL PERSONAL

10. CANALES DE COMUNICACION

11. FACILIDAD EN TRAMITACION INTERNA

12. FACILIDAD EN TRAMITACION EXTERNA

13. OTRO:

14. OTRO:

E. ¿EN QUE OTRAS AREAS O NIVELES CONSIDERA QUE LA EMPRESA DEBE RECIBIR MAS CAPACITACION?

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APPENDIX 7 IN-COUNTRY TRAINING REPORTS FOR USAID/COSTA RICA

Appendix 7

CUADRO N° 1

PROYECTO AID -515-0212: Programa Sector Privado

Eventos Realizados, 1° enero - 31 marzo 1985

| EVENTO | SECTOR | PARTICIPANTES | FECHA | DURACION | COSTO MATRICULA | APORTE | | COSTO 2/ TOTAL |
|---|------------------------|---------------|-------------|----------|--------------------|---------------|----------------------------|-------------------|
| | | | | | | PROCAP ESF | APORTE 1/ CONTRAPARTIDA | |
| Curso Ingeniería en Maderas | Producción Forestal | 36 | 4-8 Marzo | 40 H | 4,500.00 | 35,088.00 | 212,000.00 | 247,088.00 |
| Control de Inventarios | Maquila | 25 | 11-19 marzo | 36 H | 2,000.00 | 49,100.00 | 123,650.00 | 172,750.00 |
| La Motivación de la calidad | Agroalimentario | 40 | 12 marzo | 3 H | 1,000.00 | 12,500.00 | 46,000.00 | 58,500.00 |
| Curso Orientaciones Ambiente Gerencial | Agroalimentario | 20 | 29-30 marzo | 8 H | 6,250.00 | 12,500.00 | 145,000.00 | 151,500.00 |
| Curso Electrónica Digital | Electrónica | 20 | 18/3 - 24/4 | 51 H | 4,000.00 | 40,000.00 | 131,000.00 | 171,000.00 |
| Curso Electrónica de Microprocesadores | Electrónica | 20 | 21/3 - 19/5 | 51 H | 4,000.00 | 40,000.00 | 131,000.00 | 171,000.00 |

Matrícula, salarios, transporte, etc.

Contrapartida + Aporte PROCAP

Economic Support Fund

PROCAP-CINDE, Mayo 1985

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Appendix 7

CUADRO N° 2

PROYECTO AID 515-0312: Programa Sector Privado

Eventos a Realizar, Abril - Julio 1985

| EVENTO | SECTOR | FECHA APROXIMADA | PARTICIPANTES | DURACION APROXIMADA |
|---------------------------------------|-----------------|---------------------|---------------|------------------------|
| Curso Administración de la Producción | Maquila | 8-24 abril | 24 | 40 Horas |
| Curso Admnsitración de computadores | Agroalimentario | 8-30 abril | 30 | 33 Horas |
| Curso Administración de la Producción | Agroalimentario | 9/4 30/5 | 30 | 48 Horas |
| Curso Análisis y Valoración de Tareas | Agroalimentario | 9/4 16/5 | 30 | 36 Horas |
| Curso Fomento Agroindustrial | Agroindustrial | 22/4 5/7 | 1 | 11 Semanas |
| Conferencias Maquila | Maquila | 8 Mayo | 40 | 4 Horas |
| Curso Electrónica de Microproces. | Electrónica | 13/5 12/6 | 20 | 50 Horas |
| Curso Electrónica Industrial | Electrónica | 14/5 27/6 | 20 | 50 Horas |
| Curso Control de Inventarios | Agroalimentario | 6/5 5/6 | 30 | 30 Horas |
| Curso Analisis Proyectos Inversión | Agroalimentario | 6-29 Mayo | 25 | 24 Horas |
| Seminario Planeamiento Estratégico | Agroalimentario | 24-25 Mayo | 25 | 8 Horas |
| Curso Control de Calidad | Agroalimentario | 10-28 Junio | 30 | 18 Horas |
| Curso Control de calidad | Maquila | Junio | 25 | 36 Horas |
| Curso Inglés Técnico | Maquila | Julio | 20 | 60 Hras |
| Curso Rosas | Horticultura | Julio | 20 | 24 Horas |

5/1/85

APPENDIX 8 SELECTION OF FIRMS FORM

SELECCION DE EMPRESAS PARA ADIESTRAMIENTO CORTO EN USA

FOR INDUSTRIES

| I | CLASE DE PRODUCTO | 40% | PUNTOS |
|-----|---|-----|--------|
| 1. | INCLUIDOS EN LA LISTA DE ARTICULOS BENEFICIADOS CON EL PROYECTO DE C.B.I. Y EXPORTADOS A USA EN FORMA PERMANENTE | | 100 |
| 2. | INCLUIDOS EN LA LISTA DEL PROYECTO DE C.B.I. PERO NO EXPORTADOS A USA POR EL MOMENTO | | 75 |
| 3. | PRODUCTO DE EXPORTACION EXTRAREGIONAL NO INCLUIDOS EN LA LISTA DEL PROYECTO DE C.B.I. PERO EXPORTADOS COMO NO TRADICIONALES | | 50 |
| 4. | PRODUCTOS QUE NO SE AJUSTAN A NINGUNA DE LAS ESPECIFICACIONES ANTERIORES | | 25 |
| II | VALOR DE LAS EXPORTACIONES ANUALES | 30% | PUNTOS |
| 1. | EXPORTACIONES QUE SOBREPASAN LOS \$2 000 000 | | 100 |
| 2. | EXPORTACIONES DE \$1 000 000 A \$2 000 000 | | 75 |
| 3. | EXPORTACIONES DE \$500 000 A \$1 000 000 | | 50 |
| 4. | EXPORTACIONES DE MENOS DE \$500 000 | | 25 |
| III | CONTRIBUCION A LOS COSTOS DIRECTOS DEL ADIESTRAMIENTO | 20% | PUNTOS |
| 1. | MAS DEL 75% DEL COSTO DIRECTO (NO INCLUYE SALARIOS Y SIMILARES) | | 100 |
| 2. | EL 50% O MAS, HASTA EL 75% INCLUSIVE DE LOS COSTOS DIRECTOS | | 75 |
| 3. | EL 25% O MAS, HASTA EL 50% INCLUSIVE DE LOS COSTOS DIRECTOS | | 50 |
| 4. | NO MAS DEL 25% DE LOS COSTOS DIRECTOS | | 25 |
| 5. | NINGUNA CONTRIBUCION A LOS COSTOS DIRECTOS | | 0 |
| IV | TAMAÑO DE LA EMPRESA | 10% | PUNTOS |
| 1. | DE 5 A 29 EMPLEADOS | | 100 |
| 2. | DE 30 A 49 EMPLEADOS | | 75 |
| 3. | DE 50 O MAS EMPLEADOS | | 25 |
| 4. | 150 O MAS EMPLEADOS | | 25 |

EVALUACION

PUNTAJE:

CATEGORIA:

CATEGORIAS:

A- DE 75 A 100 PUNTOS
 B- DE 50 A 75 PUNTOS
 C- DE 25 A 50 PUNTOS
 D- MENOS DE 25 PUNTOS

70/2

APPENDIX 9 SELECTION OF PARTICIPANTS FORM

Appendix 9

SELECCION DE CANDIDATOS PARA CAPACITACION EN U.S.A.

I CATEGORIA DE LA EMPRESA: 40%

| | PUNTOS | | PUNTOS |
|---|--------|---|--------|
| A | 100 | C | 50 |
| B | 75 | D | 25 |

II EXPERIENCIA LABORAL DEL CANDIDATO: 20%

| | | | |
|---------------|-----|---------------|----|
| MAS DE 6 AÑOS | 100 | DE 3 A 4 AÑOS | 50 |
| DE 5 A 6 AÑOS | 75 | DE 1 A 2 AÑOS | 25 |

III CONOCIMIENTO DEL IDIOMA INGLES: 20%

| | | | |
|-----------|-----|---------|----|
| EXCELENTE | 100 | BUENO | 50 |
| MUY BUENO | 75 | REGULAR | 25 |

IV NIVEL EDUCATIVO: 20%

| | |
|---|-----|
| MAS DEL MINIMO DE PREPARACION REQUERIDO | 100 |
| MINIMO EXIGIDO | 50 |
| MENOR DEL MINIMO | 25 |

CATEGORIA:

PUNTAJE:

CATEGORIAS:

- A- 100 PUNTOS
- B- 75 PUNTOS
- C- 50 PUNTOS
- D- 25 PUNTOS

ya

APPENDIX 10 SUGGESTED PTMS SCREEN CHANGES FOR CINDE/PROCAP'S
IN-COUNTRY TRAINING PROGRAM

Participant Training Management System
Manual Worksheets
AID/M/SER/IRM June 1985

change ALL dates
to DD/MM/YY FORM

CINDE/PROCAP

PART 1

PTMS PROJECT WORKSHEETS

IN-COUNTRY

I. PROJECT INFORMATION

| DIV. CODE | DIVISION NAME | COUNTRY CODE | COUNTRY NAME | SECTOR ACCOUNT CODE | SECTOR ACCOUNT NAME |
|-----------|---------------|--------------|--------------|---------------------|---------------------|
| --- | ----- | --- | ----- | --- | ----- |

| PROJECT NUMBER | PROJECT NAME | PROJECT OFFICER | CONTRACT NUMBER | CONTRACTOR | TYPE OF PROJECT (FUNDING) |
|----------------|--------------|-----------------|-----------------|------------|---------------------------|
| --- | ----- | ----- | ----- | ----- | ----- |

| PROJECT START DATE | PROJECT ACTIVITY COMPLETION DATE | PIO/P NUMBER | PIO/P AMOUNT | PROJECT FUNDING SOURCE |
|--------------------|----------------------------------|--------------|--------------|------------------------|
| 1/1 | 1/1 | --- | \$--- | --- |

14:

APORTE PROCAP APORTE CONTRA PARTIDA COSTO TOTAL
ESF

32

LNDE/PROCAP

PART 2

PTMS PARTICIPANT WORKSHEETS

IN-COUNTRY

Change ALL DATE

FORMATS to:
DD/MM/YY

I. GENERAL INFORMATION

IV.A. BIOGRAPHICAL DATA

| TITLE | LAST NAME | FIRST NAME | MIDDLE INITIAL | SEX | MARRIED? | DATE OF BIRTH (DOB) | COURSE TRIP NUMBER |
|-------|-----------|------------|----------------|-----|----------|---------------------|--------------------|
| ----- | ----- | ----- | - | - | - | --/--/-- | ----- |

IV.B. EMPLOYMENT DATA (at time of selection)

| EMPLOYER NAME | POSITION | GRADE | CITY OF EMPLOYMENT | PROVINCE OR STATE |
|---------------|----------|-------|--------------------|-------------------|
| ----- | ----- | ----- | ----- | ----- |

ANEX II

INDE/PROCAP

PART 2

PTMS PARTICIPANT WORKSHEETS

IN-COUNTRY

V. PROCESSING INFORMATION

| NOMINATION DATE | DOCUMENTS PCID DATE | EST, CALL FORWARD DATE | ALIGU USAGE LISTENING VOC/READING | TOEFL SCORE | OTHER TEST INFORMATION TEST NAME | TEST SCORE |
|-----------------|---------------------|------------------------|-----------------------------------|-------------|----------------------------------|------------|
| ___/___/___ | ___/___/___ | ___/___/___ | ----- | ----- | ----- | ----- |

| | (Y/N) | (Y/N) | (Y/N) |
|--|-------|---------------------------------------|--|
| BIO AND OTHER MATERIALS & APPLICATION FORM? | --- | DEPENDENT CERT. COMPLETED? | TRAVEL ARRANGEMENT COMPLETED? |
| TRANSCRIPTS PROVIDED? | --- | TIP RECEIVED? | PRE-BEP ORIENTATION? |
| PAYMENT? | --- | II.C. AGREEMENT SIGNED? | ADVANCE MAINTENANCE RECEIVED? |
| PIO/P ISSUED AND SENT? | --- | MEDICAL COMPLETED? | VISA ISSUED? |
| FAMILY JOIN /APP? | --- | CALL FORWARD RECEIVED? | ARRIVAL NOTICE SENT? |
| ADMITTED TO COURSE? | --- | | |

ADD: SALARY -----

SELECTION CRITERIA INFORMATION

LA EMPRESA --- EXPERIENCIA --- INGLES --- NIVEL EDUCATIVA ---

PTMS PARTICIPANT WORKSHEETS

INDE/PROCAP

IN-COUNTRY

VI. TRAINING INFORMATION

| TYPE OF TRAINING | TRAINING OBJECTIVE | COURSE START | | COURSE ESTIMATED COMPL. DATE | LAST PROGRESS REPORT DATE | TECHNICAL CODE | ACTIVITY | INFORMATION NAME |
|------------------|---------------------------|------------------------------|----------|------------------------------|---------------------------|--|----------|------------------|
| | | DEPARTURE DATE | DATE | | | | | |
| ---- | ---- | --/--/-- | --/--/-- | --/--/-- | --/--/-- | ---- | ----- | ----- |
| TRAINING CODE | FACILITY INFORMATION NAME | TRAINING COUNTRY INFORMATION | | TRAINING CODE | COUNTRY INFORMATION NAME | INSTRUCTOR CONTRACTOR INFORMATION NAME | | |
| ---- | ----- | ----- | | ---- | ----- | ---- | ----- | ----- |

REMARKS

PART 2

PTMS PARTICIPANT WORKSHEETS

IN-COUNTRY

VII. FOLLOW-UP/INFORMATION

| EMPLOYER NAME | POSITION | GRADE | CITY OF EMPLOYMENT | PROVINCE OR STATE PO BOX NO. | ZIP CODE | EMPLOYER PHONE |
|---------------|----------|-------|--------------------|---------------------------------|----------|-------------------|
| ----- | ----- | ----- | ----- | ----- | ----- | ----- |

EMPLOYER
STREET ADDRESS

| RETURN DATE | 1ST ^{QUESTIONNAIRE} INTERVIEW DATE | 2ND QUEST. FIRST LETTER DUE DATE | 3rd QUEST. NEXT LETTER DUE DATE | REPLY TO 1ST LETTER ^{QUEST.} SENT DATE | to 2ND QUEST. REPLY, REG'D DATE | REPLY TO 3rd Q. FOLLOW-UP END DATE |
|-------------|---|--|---------------------------------------|---|---------------------------------------|--|
| --/--/-- | --/--/-- | --/--/-- | --/--/-- | --/--/-- | --/--/-- | --/--/-- |

| PROFESSIONAL SOCIETY MEMBER? | HOLDS CERTIFICATE OF ACHIEVEMENT? | NO. OF. LETTERS SENT | QUESTIONNAIRE NO. (if any) | DEGREE OR CERTIFICATE EARNED | SALARY | REMARKS ON FILE |
|---------------------------------|--------------------------------------|-------------------------|-------------------------------|---------------------------------|--------|-----------------|
| --- | --- | --- | --- | --- | --- | --- |

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