USAID/ZAMBIA

HRDA PROJECT (698-0463)

RECOMMENDATIONS FOR IMPROVING
TRAINING MANAGEMENT

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as a core-funded activity

HUMAN RESOURCES DEVELOPMENT ASSISTANCE PROJECT
(698-0463)
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AFR/ONI/TPPI

AMEX INTERNATIONAL, INC.
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USAID/ZAMBIA
RECOMMENDATIONS FOR IMPROVING TRAINING MANAGEMENT

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I.   BACKGROUND

The Human Resources Development Assistance Project (HRDA 698-0463) of AFR/ONI/TPPI offers core-funded technical assistance to USAID Missions in sub-Saharan Africa. In early 1994, an Africa-wide cable was sent to USAID Missions to solicit requests for 4-5 day technical field visits to carry out specific activities related to training management. Eighteen Missions, including USAID/Zambia, responded with detailed requests for the technical assistance support.

A.   TDY Purpose

The Mission's Training Office had requested assistance in five areas:

1)   to provide guidance to the Mission on preparation and responsibilities for the upcoming **impact scope of work**;

2)   to review the **draft Mission Operation Procedures** that govern all aspects of training implementation procedures;

3)   to suggest guidelines for how to **assess providers of training** when contracting for in-country training services;

4)   to create a format for the Mission's upcoming **newsletter**;

5)   to recommend steps for the Training Office to further the development of an **alumni association**.

B.   Approach

The Mission initially requested these field support activities in Lusaka 01296, refined through subsequent e-mail traffic with HRDA project management at AFR/ONI/TPPI.

AFR/ONI/TPPI's Public Sector Training Specialist, Rita Wollmering, and AMEX International/Creative Associates' Core Consultant, Susan Votaw carried out this core-funded activity. Ms. Votaw spent approximately one week in Zambia during August 1994 for this activity. Rita Wollmering was in Zambia from 25 July through 18 August 1994. In addition to working on these five tasks, she laid the groundwork for the upcoming HRDA Agro-Industrial Workshop, to be held in Lusaka 5 to 15 September 1994. Her workshop activities are not covered in this report.

In discussions with the staff of both the General Development Office (GDO) and the Training Office (TO), final verbal clarification on the tasks to be carried out was given upon the team's arrival. The team developed a timeline for accomplishing its objectives, attached as an appendix.

The consulting team would like to thank the Training Office staff at USAID/Lusaka. We were able to handle a demanding schedule in great part because of their availability, wisdom, and commitment to USAID's training activities in Zambia. Asina, Bessie and Eta spared no effort to make our visit a success. We are grateful to all of you.

C.   Mission Response

This report was distributed during the morning of the team's last day in-country to give Mission staff time to read it in preparation for our final debriefing. A meeting was held that afternoon with Val Mahan, Asina Sibetta, Bessie Thornicroft and both members of the consulting team to discuss these findings and recommendations. The team was further in daily communication with Training Office staff: Training Office staff chaired or participated in every meeting, and we met daily with the Training Office to discuss issues arising from these meetings.

II.   PREPARATION AND RESPONSIBILITIES FOR THE UPCOMING IMPACT SCOPE OF WORK

Our mandate was to clarify the upcoming impact scope of work and Mission responsibilities with the Mission.

A two-hour discussion on August 10, 1994 resulted in substantive clarifications which are summarized in the attached memo.

In working with the Mission to clarify the scope of work, we used the definitions provided on the next page.

III.   DRAFT MISSION OPERATION PROCEDURES

Our mandate was to review existing draft Mission Operation Procedures (MOPs), to suggest revisions, and to recommend additional MOPs if appropriate.

We reviewed six draft Mission Operation Procedures and recommended revisions in the drafts' purposes and procedures. The Training Office asked the team to examine the following draft MOPs: "Training Selection Procedures;" "Training Cost Analysis Procedures;" "Training Processing Procedures;" "Training Monitoring Procedures;" "Training Evaluation Procedures;" and "Training Non-Returnees."

Definitions of Terms related to Impact Monitoring and Evaluation

Impact	The change in capacity or performance that results from an intervention.
Monitoring Plan	A step-by-step agenda for keeping track of whether an intervention or set of interventions is having the desired effect.
Impact Monitoring Plan	A step-by-step set of procedures for keeping track of whether an intervention or set of interventions is having the impact that was intended when the intervention was designed.
	An Impact Monitoring Plan might include a methodology, assessment instruments, and a schedule for applying the instruments, and might spell out the various roles and responsibilities associated with implementing the Plan.
Methodology	A description of how a task was or is to be performed, including the theoretical or analytical approach and the steps to take to implement the task.
Assessment Instrument	Questionnaires or surveys calculated to find answers to a pre-defined set of questions (for instance, were training objectives met? has an individual's capacity to perform a given task increased?)
Training Strategy	A document that lays out the parameters and guidelines under which a Mission implements education and training activities. When a Training Strategy covers a Mission's entire training portfolio it is generally called a Country Training Strategy. A Training Strategy can also apply to a single bilateral or multi-lateral project.
Strategy to Train for Impact	A Training Strategy that focuses on the steps required to maximize the likely impact of education and training activities on the people who undergo the training and on the organizations or firms within which they work.
Ongoing Monitoring	The continual act of keeping track of a project or intervention's status and results.
Evaluation	A process of assessing the past performance of an intervention or set of interventions.
Design	The process of planning a future intervention or set of interventions.

Deliverable	The product desired at the conclu ion of a consulting assignment, which should ideally be spelled out as clearly as possible so that both client and consultants know what to expect from the assignment, minimizing the potential for client dissatisfaction at the conclusion of the assignment.
Impact Hierarchy	Levels at which the impact — the change resulting from an intervention — can be discerned as shown in the following diagram.

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IMPACT HIERARCHY

Nation
↕
Target Beneficiary Population
↕
Sector
↕
Institution
↕
Individual
```
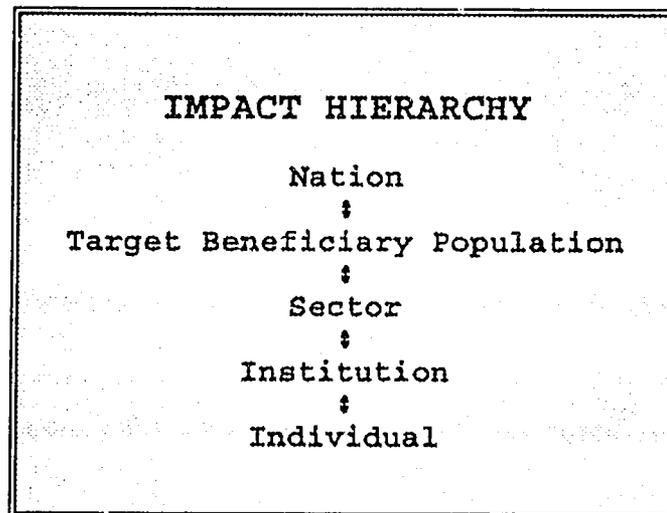
A.   Enhancing the Mission's Capacity to Develop a MOP

In consultation with Mission staff, we agreed that it would be most useful to the Mission for us to provide guidelines on how to develop a Mission Operation Procedure. Since Training Office staff had already developed good drafts, this would enhance the Mission's in-house capability to write their own MOPs. We were not asked to write the actual MOPs since this would not support Mission in-house capacity.

We held a quarter-day workshop on August 10, 1994, attended by Asina Sibetta, Bessie Thornicroft, and EXO Cynthia Bryant. We concentrated on the following:

• defining the purpose of a Mission Operation Procedure: to establish and clarify standardized procedures for Training Office and project staff;

• the elements of a MOP (purpose, definitions, policy, procedures, and applicability);

- the number of MOPs the Mission might need based on the variety of training the Mission is funding (long-term US, short-term US, short-term third country, and short-term in-country training; Training Office-managed and project-managed training).

B.   Recommended MOPs

We recommended that the Mission's MOPs clearly establish all procedures for training,, and be as brief yet as thorough as possible. In other words, whenever procedures are identical, they should be covered by a single MOP.

We discussed and concurred with Ms. Sibetta's decision to divide the MOPs according to the sequence of steps required to implement training since this implies the least duplication among MOPs. For instance, a single MOP can cover Evaluating Training Programs, with differing responsibilities noted as they occur for contractor- or project-managed training or for short-term versus long-term training.

In concurrence with the Training Office and EXO, we recommended the following MOPs, corresponding to the sequence of steps associated with implementing training:

- selecting candidates for training;

- processing documents prior to training, including producing the training cost analysis (TCA);

- monitoring the participant while in training, up through repatriation;

- evaluating individual training programs;

- dealing with non-returnees.

These correspond to the Training Office's original MOP drafts, with one exception: as a group we found that the MOP for pre-training processing could be combined with the MOP for TCA procedures.

C.   MOP Purpose

We recommended that the purpose of each MOP be clearly defined. We suggested that the Training Office modify their existing drafts using the following language: "The purpose of this Mission Operations Procedure is to establish and clarify standardized procedures for

Training Office and project staff for ..." — inserting the appropriate MOP purpose, for example, selecting participants for long-term academic training.

D.   MOP Procedures

The process of defining which MOPs to write requires isolating the steps the Mission performs to implement training. The existing drafts' sections on policy and applicability were fine. The team felt that our workshop could best serve the Training Office by concentrating on the skills required to articulate the step-by-step Procedures section.

We recommended the following technique to write a MOP's Procedures section:

1.   Decide which MOP to work on — for instance, Pre-Training Processing.

2.   Begin with Training Office-managed steps.

3.   Isolate each step — for instance, cabling concurrence for a Training Implementation Plan (TIP).

4.   Lay out each isolated step in the form of a flow chart.

5.   Specify *what* is the procedure — in this example, cabling concurrence to AID/W.

6.   Specify *who* is responsible for accomplishing the step — here, the Training Officer.

7.   Specify *by when* the task must be accomplished — for instance, within a week of receipt.

8.   Specify how, if at all, the procedure differs for contractor- or project-managed training.

9.   Remember to spell out any steps relating to updating the Participant Training Management System (PTMS).

We recommended that Training Office try to be specific and use active terms in describing the procedures — for instance, "the Training Office cables concurrence to AID/W" instead of "concurrence is cabled" or "the Mission cables concurrence."

We worked through the procedures for three MOPs (Selection; Pre-Training Processing and Monitoring/Repatriation). The Training Office staff developed work flow charts for all activities under each. Training Office staff can now write up these three Procedures sections and finalize these three MOPs.

As a result of this workshop, Mission staff responsible for developing MOPs for training procedures can now define what should be covered under a MOP as well as isolate the steps associated with performing the training implementation activity.

E. Next Steps for the Mission's MOPs

The Training Office will begin finalizing the MOPs already in draft form, using the techniques for defining the MOP purpose and procedures learned during the workshop.

We urge the HRDO to send drafts to AFR/ONI/TFPI as an attachment to e-mail. AID/W and/or contractor staff will be pleased to review the MOPs and make suggestions at no cost to the Mission.

IV. GUIDELINES FOR ASSESSING POTENTIAL PROVIDERS OF TRAINING

Our mandate was to examine Clark Atlanta University's current system for selecting providers of training and to provide suggestions for improvement.

The CAU contractor developed a comprehensive logframe for training activities for the remaining 18 months of the HRDA project. The Mission approved this logframe in April 1994. This team was not asked to review this logframe, its relationship to the CPSP, the definition of the client population targeted for project training, criteria for selecting firms, or ways to increase participation by women. Such a review was requested in the scope of work for the upcoming impact activity.

A. Current System for Identifying Training Providers

A two-hour meeting on 9 August 1994 was devoted to discussing the current system for identifying training courses and providers, chaired by Asina Sibetta and attended by Bessie Thornicroft and CAU Project Manager Wilbur Jones.

According to the project manager, CAU has been providing a "variety of in-country training courses" for small and medium enterprises (SMEs), offering "basics all across the board" on topics such as basic accounting, taxation, business law, business planning, basic finance, supervisory skills, and export marketing. Needs for training were based on the Private Sector Training Needs Assessment that Labat-Anderson conducted in 1991.

The project is implemented by three parties:

- the Mission, responsible for project oversight and for final approval of all project activities;

- Clark Atlanta University, responsible for developing the logical framework for project training activities and for implementing all aspects of the project — full-time staff include a project manager, a training coordinator and a secretary;

- the Project Training Sub-Committee and its ad hoc committees, comprised of representatives of the private sector and government, responsible for considering and approving all training activities, including selection of trainers.

An attachment to this report supplies a complete description of the CAU process for defining areas of training, designing courses, identifying training providers, training trainers, and evaluating training.

B.   Comments on the Current System

These comments supplement the discussion of the training implementation process supplied in the CAU Strategic Planning Document.

- Training design is disassociated from training implementation, methodology and styles when training is designed at CAU headquarters in Atlanta and then performed in Zambia using local trainers chosen by CAU/Lusaka.

- There is no mechanism to assure that the network of training providers reaches wide enough to bring in the best trainer(s) for a particular course.

- Local capacity-building requires that master trainers be trained in training design in addition to training style and audio-visual techniques.

- There is no built-in mechanism for evaluating CAU's process or for adjusting the system when appropriate.

- Evaluation is restricted to end-of-course assessments.

- There are no written, formalized criteria for selecting providers of training.

- The absence of formalized written criteria makes the process hard to evaluate properly.

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C.   Suggested Improvements

As agreed with the HRDO and Training Specialist during the team's visit, suggested guidelines for assessing providers of training will be included in the upcoming impact activity.

V.   NEWSLETTER

The team suggested steps towards establishing a newsletter and worked with the Training Office to devise a sample format.

A.   Format for a Sample Newsletter

In a two-hour workshop on August 9, complemented by additional sessions on 11 and 12 August, Bessie Thornicroft developed and manipulated a sample two-page, two-column newsletter format. Ms. Thornicroft is a very capable computer learner, and was able to design a newsletter that can be produced in-house, using WordPerfect 5.1 and a laser printer.

We recommended a two-page, two-column newsletter format for the following reasons:

- It is simple to learn and to manipulate.

- The short and finite length limits writing, editing, production and coordination responsibilities so as to keep responsibilities manageable.

- It can be xeroxed back-to-back onto a single sheet of paper.

- No special supplies are required.

- A single sheet means low eventual mailing costs.

- It is easiest to "start small."

- A short newsletter is the most readable.

We also recommended file naming conventions for newsletter storage and retrieval on the Mission's LAN, and we provided instructions on using a graphics package that HRDA/Washington provided to HRDA/Zambia. Ms. Thornicroft developed written instructions for how to replicate or adjust her format in the future. A copy of her sample newsletter is attached to this report.

B.   Recommendations

In order to finalize the Mission's newsletter, certain key issues must be confronted. The Mission must begin by deciding what purpose the newsletter is to serve.

The purpose behind the newsletter will determine its audience, content, and frequency as well as responsibilities for content and production.

Any decision on newsletter purpose and audience will have management implications.

Examples of potential uses, audiences, and responsibilities are shown on the following page. In addition, a discussion entitled "Using Newsletters Strategically" is included as Attachment 3, and includes production and budget options.

VI.   STEPS FOR DEVELOPING AN ALUMNI ASSOCIATION

The team worked with Mission staff to define their goals for an alumni association.

Asina Sibetta held a two-hour meeting on 11 August with Bessie Thornicroft and the team to discuss the Mission's purpose for an alumni association. We focussed on the following issues:

- What is the Mission's rationale for an alumni association?

- What motivates the alumni to form an association?

- How will the association be funded?

- What Mission resources are required to organize and maintain an alumni association?

- How can the association become self-sustainable?

THE PURPOSE AND CONTENT OF THE NEWSLETTER WILL DETERMINE THE MISSION'S LEVEL OF RESPONSIBILITY				
WHAT WILL BE THE NEWSLETTER'S PURPOSE?	WHO WILL BE THE AUDIENCE?	WHO WILL BE RESPONSIBLE FOR ITS CONTENT? *	WHO WILL PRODUCE IT? **	WHAT WILL BE THE MISSION'S RESPONSIBILITY?
Will it highlight USAID/Zambia's use of training as a strategic development tool to enhance the Training Office's visibility?	Mission; GOZ; employers.	Training Office.	Training Office.	Full responsibility for content and production.
Will it be used to maintain contact with new recruits, with participants in training and/or with returnees?	Participants; alumni; employers.	Training Office.	Training Office.	Full responsibility for content and production.
Will it provide a forum of discussion for issues of interest to new, current and former trainees?	Mission; GOZ; participants; alumni; employers.	Participants; Training Office.	Training Office; eventually, possibly, Alumni Association.	Initial full responsibility for content, for soliciting articles and for production; content and production responsibilities might be passed on to the Alumni Association.
Will it be used to advertise Mission training opportunities, providing information to the general public about upcoming training opportunities, information on recruitment and selection, and so on?	GOZ; employers; alumni; potential trainees.	Training Office.	Training Office.	Full responsibility for content and production.
Will the eventual Alumni Association use it to network with its members? Will it provide a follow-on service for the Mission?	Alumni of Mission-funded training; GOZ; employers.	Alumni Association.	Training Office or Alumni Association.	Possible initial responsibility for production.

* Content responsibilities include writing, editing and coordinating all articles.

** Production responsibilities include formatting and printing the newsletter, xeroxing, procuring supplies (labels, envelopes), developing and maintaining a mailing list, producing labels, postage, and coordination.

Mission responsibilities include content and production.

A.   Opportunities for an Alumni Association

USAID/Zambia has a rich history of training and therefore a wealth of alumni from all regions of the country, trained in a wide range of fields of study, and active in all sectors of the economy.

Many alumni were in training together and developed strong relationships during their period of training. This is true both for alumni of in-country training programs and for those who were in the US at the same time. The alumni association can seek to build on these existing relationships.

No Training Office staff have been dedicated to following up with Mission alumni. Nonetheless, the Training Office calculates that some 75 percent of the addresses in the PTMS database are current, and had already drafted a letter to alumni prior to the team's arrival requesting up-to-date employment and address information.

Tentative steps towards forming an association have been taken in the past, with varying degrees of interest voiced both by the alumni and the Mission. The new Director's upcoming arrival provides an opportunity to capitalize on this groundwork.

B.   Challenges

There has been no formal protocol for maintaining relationships between alumni and the Training Office. Training Office staff estimate that "very few" project- or contractor-funded trainees report to the Mission upon completion of training. It appears that these alumni are not aware of the Mission Training Office's role in their training opportunity.

Mission leadership commitment to the alumni association has been individual, not systematized, so it has been difficult to make sustainable commitments of resources to the potential association.

C.   Issues to Address

There are many reasons for a Mission alumni association, all valid, all requiring different inputs of staff and financial resources. As we discussed in our meeting:

- •   An association that is driven by both Mission and the alumni themselves has the highest chance of sustainability.

- An association that is primarily Mission-driven offers the least likelihood of eventual independence.

- Everyone can benefit from an alumni association. The Mission may want services from this wealth of talent. Alumni may be interested in benefits such as consulting experience, money, or access to literature or developments in their professional field. A "win/win" alumni association offers the strongest likelihood of sustainability.

- There is no perfect solution: all associations have costs and benefits accruing to the Mission and to the alumni.

Some reasons for forming alumni associations alongside some associated costs and benefits are shown in the chart on the following page.

D.   Recommended Next Steps

We recommend the following steps in moving the Mission's alumni association forward.

- The Training Office should decide what purpose its alumni association is to serve.

- The Training Office should recommend this alumni association to the new Director upon his arrival and be prepared to discuss the advantages and disadvantages of their recommendation.

- With the Director's support, the Training Office should contact key alumni to determine interest and to discuss the ramifications of the alumni association they propose.

- With the Director's support, the Training Office should work with project office and contractor staff to develop procedures for alumni who are not aware of the role the Training Office played in their training experience and of the role they can play in an alumni association.

A MISSION MUST WEIGH BENEFITS TO THE ALUMNI AND TO THE TRAINING OFFICE AGAINST THE RESOURCES AN ALUMNI ASSOCIATION REQUIRES

RATIONALE FOR AN ALUMNI ASSOCIATION	PRIMARY DRIVER	BENEFIT TO MISSION	BENEFIT TO ALUMNI	FINANCIAL IMPLICATIONS	QUESTIONS TO ADDRESS
The Mission has to have one, it's mandated in Handbook Ten.	Mission.	An AID/W requirement is met.	Maintain contact with the Mission.	100 percent Mission funds.	How can Mission and alumni commitment be generated? How can the association become sustainable?
To maintain contact with people in whom Mission has invested its resources.	Mission.	Mission is in touch with former participants.	Maintain contact with the Mission.	100 percent Mission funds.	How can the association be formalized for sustainability?
To create a database of potential consultants.	Mission; alumni.	A roster of consultants is available for assistance with Training Office activities (selection, pre-departure orientation, follow-on) or consulting teams (team members, logistics).	Alumni gain experience, financial benefits; professional outreach.	Funds needed to develop database; ongoing Mission staff and funds must be committed to maintain and update the database	Who will fund the conceptual development and the programming of the database? To whom will this be contracted? Who will manage and implement the sizeable task of ongoing maintenance of the database?
To create a formal consulting organization.	Alumni; Mission.	An organization exists with which the Mission can contract for services for Training Office activities (selection, pre-departure orientation, follow-on) or for consulting assignments; the organization can access ATLAS grant funds of up to US$30,000 for organizations with a majority of former US government-funded trainees.	Alumni gain experience; financial benefits; professional outreach	Mission might provide start-up funds; organization might become financially viable.	How can the organization meet USAID procurement regulations?
To provide resources to assist the Mission in processing training (selection, pre-departure, follow-on).	Mission; alumni.	Mission would have appropriate (with some training) assistance with time-consuming tasks.	Alumni gain experience; if services are paid, financial benefits.	100 percent Mission funds.	How would this be set up? Would services be voluntary or remunerated? How would alumni qualify to perform these services? Who will train them?
To channel the energies of dedicated alumni into public service voluntary projects.	Mission; alumni.	Mission would be providing a service to Zambia while meeting a Handbook Ten requirement.	Alumni would contribute to their country.	100 percent Mission funds.	How would this be set up? How can this be formalized for sustainability?
USAID alumni association becomes part of the Zambian-American Business Council.	Mission.	USIS takes primary responsibility and the Mission satisfies a Handbook Ten requirement.	Alumni would have an existing organization to join.	Unknown.	Will such an organization meet Mission objectives? What about alumni of other than business training?
Any alumni association.		Who qualifies for membership? Should it encompass be all USAID-funded participants? Should membership be restricted? To whom? To US trainees? To US long-term alumni? By field of training? What about alumni of third country training? Of in-country training? Who should make this decision? Mission and/or alumni? Should the organization charge membership fees?			

These procedures can be formalized by incorporating them into the appropriate Mission Operation Procedure.

- The Mission should hold an awards ceremony following the Director's arrival. This will be a good opportunity to provide the Director with some visibility and contacts, to seek employer and address information in order to update the PTMS database, to take advantage of the change in Mission leadership to galvanize training activities, and, with a decision in place about the nature of the proposed association, to give potential alumni association members and Mission staff something concrete to discuss.

- To assist with the legalities and formalities of formalizing an organization, the Training Office should e-mail Training Officer Kristos Minja in Tanzania and ask for a copy of the Tanzania alumni association's charter.

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ATTACHMENT 1

Rita Wollmering/Susan Votaw
Schedule of Meetings

August 8-12, 1994

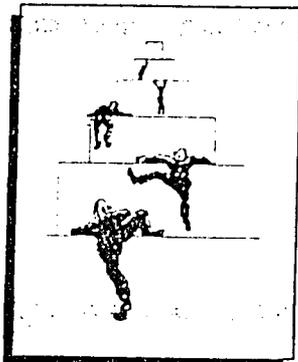|	Morning	Afternoon
Monday 8/8	9:00: Set-up (Asina, Bessie)	3:00 Expectations and Timeline (Val, Asina, Bessie)
Tuesday 8/9	9:00-11:00: Newsletter format (Bessie)	2:30-4:30: Assessing Training Providers (Asina, Bessie, Wilbur)
Wednesday 8/10	9:00-11:00: Monitoring Impact (Val, Asina, Bessie, Wilbur)	2:30-4:30: Mission Operation Procedures Workshop (Asina, Bessie, Cynthia)
Thursday 8/11	9:00-11:00: Mission Alumni Association (Asina, Bessie)	2:30-4:00: Newsletter format (Bessie)
Friday 8/12	10:00: Distribute trip report; mop up	3:00: Debriefing (Val, Asina, Bessie)

USAID/ZAMBIA TAKES LEAD TO INCREASE TRAINING'S IMPACT

USAID/Zambia is taking a bold initiative to become a leader in Southern Africa in designing and managing training activities specifically for their impact on Zambia's development agenda. A contract is being signed to provide a consulting team to assist the Mission in designing a plan for monitoring the impact of their training portfolio.

USAID/Zambia recognizes that training is a tool that can be used strategically to further overall development goals. The Mission believes that training interventions can be designed to remedy those skill shortcomings that prevent key institutions from performing at their best in achieving the Government's goals for the Zambian people.

General Development Officer Val Mahan laid down the Mission's gauntlet to the advance team in Lusaka in August. "Impact is our biggest interest," he stated, summarizing the Mission's position to AFR ONI TPPI HRDA Training Specialist Rita Wollmering and Creative Associates Senior Associate Susan Votaw. The advance team held a two-hour workshop with Training Office staff to discuss some of the challenges and to begin the dialogue about Mission responsibilities implied in training for impact.

The first step for designing training for impact is to situate the Mission's training portfolio within its overall development objectives in Zambia. The Mission has already demonstrated initiative in this regard. Mission

Manager Wilbur Jones recently completed a logical framework of future training activities. This framework spells out the purpose of training and its relationship to USAID/Zambia's Country Program Strategic Plan.

This CPSP document is in turn a statement of the United States' development priorities for Zambia. The CPSP was worked out after lengthy consultation with Zambian government officials. The CPSP shows the goals to which the Mission strives as well as the activities planned to achieve these goals.

The Clark-Atlanta "logframe" for training shows a year-by-year program for training in support of private sector development in Zambia. The logframe describes the purpose of the overall training portfolio and anticipated measurements of its success.

The next step in designing training to maximize its impact is to develop ways to define objectives for training for individual trainees and their employers. The consulting team will be in Zambia for two weeks, following a week-long preparation in Washington. It is expected that the team will produce guidelines and forms that will enable the Mission to track each training intervention, its anticipated impact on the employing institution, and the results that USAID-funded training can claim in enhancing institutional capacity and performance in support of development objectives.

Has USAID-funded training helped in your career? Please send your success story to the Training Office, USAID/Zambia. P.O. Box 32481 Lusaka.

TRAINING OFFICER GETS TRAINING IN TRAINING

Training professionals from 22 sub-Saharan USAID offices, including USAID/Zambia's Training Officer Asina Sibetta and Mission contractor Wilbur Jones, attended this year's HRDA-sponsored workshop. Some surprises were waiting soon after they recovered from their overnight trips to Washington. The AMEX/Creative International team of trainer-facilitators wasted no time in inviting participants to help with stand-up training during the workshop. These presentations by seasoned Training Officers, complete with field-tested ideas and useful handouts, were a hit at the workshop. Our very own Asina played the role of the recalcitrant non-returnee in a session on handling repatriation problems.

The title *Managing for Impact* captured the tenor of much of the meeting's exchanges. The latest methodology used in evaluating the development impact of USAID investments in training was summarized through interactive presentations and small group sessions. Participants were asked to design a training plan which addressed their own Mission's strategic objectives.

The workshop enjoyed visible support from high levels of AID/Washington. Deputy Assistant Administrator for Africa Gary Bombardier served as keynote speaker at the opening plenary session. Additional presenters from Africa Bureau offices were brought in for panels focussing on targeting HRDA to women or supporting democratization and governance initiatives.

Innovations in this workshop which participants applauded were the practical techniques for increasing the visibility of training. This includes the 120-page Workbook loaded with ready-to-adapt forms and procedures, many of which were replicated on computer diskettes for immediate application back home.

Participants in this eight-day workshop left exhausted, but prepared to demonstrate to their Mission colleagues how improved training design and monitoring can increase the impact of training on development and measure the

USAID/ZAMBIA HOSTS THE REGIONAL AGRO-INDUSTRIAL AND MARKETING WORKSHOP FROM SEPTEMBER 5 - 15, 1994.

USAID/Zambia will be hosting the Regional Agro-Industrial and Marketing Workshop sponsored by the U. S. Agency for International Development (USAID) in collaboration with the U.S. Department of Agriculture (USDA) from September 5 - 15, 1994. The Workshop objective is to provide a forum to analyze and develop market strategies for four commodity subsectors namely: (1) natural food ingredients, (2) essential oils, oleoresin and spices, (3) medicinal herbs, (4) processed staple crops (maize, potatoes, legumes and oilseeds).

Ms. Rita Wollmering, from AFR/ONI/TPPI Public Sector Human Resources Development Specialist has come in country to work on setting up logistics and administrative arrangements for the up-coming workshop.

Ms. Wollmering, together with the USAID/Zambia HRDO/Training Office and the help of the Mission's Executive Office are busy trying to identify the most suitable venue for the Workshop, an Agricultural Research Station and a production/processing plot or plant for site visits.

USAID/Zambia will sponsor up to fifteen (15) candidates for this workshop. This is an exciting time for USAID/Zambia so why not come along to observe and perhaps learn something about Agro-Industry and Marketing.

This Newsletter is USAID/Zambia's new communication mechanism. We are soliciting your ideas for its name. Send your thoughts to the Training Office, USAID/Zambia, P.O. Box 32481 Lusaka.

USING NEWSLETTERS STRATEGICALLY

Why use newsletters?

HRDA or other project funds can be used to finance newsletter production and distribution. This activity is an important tool for project management or follow-on, depending on the purpose of the newsletter (or newsletters!). The following list provides some possible uses of newsletters:

- USAID/X's use of training as a strategic development tool, gains higher visibility in the Mission, American community, host country and AID/W (the Training Office almost entirely responsible for content)

- Training Office maintains contacts with new recruits, participants in training and returnees (TO almost entirely responsible for content)

- Training Office provides a forum for discussing issues of interest to new, current and former trainees (TO solicits info from target audience)

- Training Office uses newsletter to inform general public about upcoming training opportunities, information on recruitment and selection, etc

- Returned participants association networks with its members, providing a follow-on service for USAID/X

- Local training provider maintains contacts with former trainees, does marketing, and provides useful information; providing a follow-on service for USAID/X

- Local service group or NGO maintains contact with its target audience, many of whom are former USAID funded trainees; providing a follow-on service for USAID/X

What kind of newsletter can we manage?

Before deciding to invest resources in a newsletter activity, project staff should come to an agreement on the purpose of the newsletter and the intended audience. Also important are questions about the technical and management support required, and the budget and other resources available for the activity. Some questions that need to be considered are:

- What is the objective of the newsletter?

- Who is the target audience of the newsletter?

- Why do you want to communicate with the target audience?

- What types of information do you want to share with the target audience?

- Has the target audience evidenced a need for the information?

- Who will write, layout and publish the newsletter?

- Does the person/group responsible for the activity have the skills required to produce the newsletter?

- Will this person be allotted the requisite time during working hours to produce the newsletter? (calculate at least three full days for a 2-page letter)

- How frequently will the newsletter be published?

- Are funds available to pay for the costs of the newsletter?

- Who will manage the activity?

- What language will the newsletter be in?

- Who will approve the final copy? (will USAID's name be on the newsletter?)

How can we get it done?

Depending on the answers to the questions provided above, the Mission (or Project) will want to figure out how it can get the product it wants. Four possible scenarios ffor the writing, editiing and publishing of the newsletter are provided below.

1. low budget in-house production, 2-4 pages a month/quarter

- use WordPerfect 5.1 or 6.0, a laser printer, colored paper, address labels, envelopes
- need staff proficient in WP use (tables, columns, text boxes, graphics, mailing lists, labels)
- need staff to write or solicit articles
- need a good editor

2. slightly higher budget, in-house, 2-4 pages a month

- same as #1 except use WordPerfect 5.1 or 6.0 plus other software and graphics packages
- need more highly skilled staff

3. higher budget (perhaps the most expensive), use in-house content, contract out production, longer, not less than once a month

- write articles in-house, edit
- have a local firm do the layout and production
- reliance on others may take more production time
- most of the technical work is farmed out, as well as the envelop stuffing and mailing costs
- might contract with a former participant or returnees assn

4. provide training to a training provider or returnees assn to produce their own newsletter for participants

- provide training and then let a contract to do the work
- may require costly training and equipment to get association up to speed

Planning articles for your newsletter

Let's suppose that you have decided to use a newsletter to communicate with the general public, former trainees, and participants about project activities, successes, and upcoming events. It will not be difficult to come up with enough articles to fill a two-page newsletter. Newsletter features can include training planned for other projects; for example, an article about the successes of training provincial AIDS counselors. By including articles about training interventions across the Mission's portfolio, the Training Office will provide a valuable service to the Mission; in seeking out articles, the Training Office staff will become more knowledgeable about the overall training portfolio and activities planned in technical projects; and as technical offices see positive reactions to articles, inclusion in the Training Office's "product" (the newsletter) will be sought after.

Consider the following:

- describe upcoming recruitment or selection processes.

- announce results of recent selection processes.

- describe a participant's reaction to a recent training program (ideas for this can come out of post-training interviews or questionnaires with participants. Of particular interest are ways the training improved the participant's job performance, increased company sales, or created more favorable conditions for implementing policy reforms.

- describe planned training activities.

- interview participants in long-term academic training. Solicit information from them about their successes or about contacts they have made in their community. (A participant might have delivered a paper at an international meeting in his/her field or may have spoken to a Rotary Club about development problems.)

- report on findings from recent evaluations, training needs assessments or other analyses.

- report on activities of returnees or returnee associations.

- briefly explain USAID policy about participant-related matters such as dependent travel or book allowances.

Larraine Denakpo, HRDA Project Manager, AMEX International, Inc.
June 1994

ATTACHMENT 4: Clark Atlanta University's Current Process for Designing Training and Identifying Training Providers

The team's mandate included providing a written description of Clark Atlanta's process for implementing in-country training programs.

The following description summarizes the presentation made by CAU Project Manager Wilbur Jones on 9 August 1994 in a meeting with Asina Sibetta (USAID/Zambia HRDO), Bessie Thornicroft (USAID/Zambia Training Specialist), Rita Wollmering AFR/ONI/TPPI HRD Specialist) and Susan Votaw (Creative Associates International Senior Associate).

Comments on the system are provided in the body of this report.

♦   **Areas of training**

Since the onset of the CAU contract earlier this year, project training activities were "rationalized" and summarized in a logframe. The project now offers 6-day courses in areas deemed responsive to the Mission's CPSP objective: to help Zambia "achieve market-oriented sustainable development based on a growing, more influential private sector," specifically by achieving a "market-oriented economy established with broad participation" (CPSP sub-goal and target). Examples of project training activities include business planning and basic finance, business contracting, export marketing, production management and quality control. In particular, the basic business planning and finance course is offered as a prerequisite to further courses.

♦   **Course design**

CAU designs outlines for courses from headquarters in Atlanta, involving a range of academic professionals including the Dean of the Business School, many of which were involved in developing the project logframe. This process is to result in a course outline — this procedure is planned, and CAU/Lusaka is currently awaiting its first result.

♦   **Identification of training providers**

Once the CAU project manager receives the course outline, he "brings it to local training providers" he knows through the personal network he established as CAU project manager and during his prior years in Zambia as a PSC on the same project. He evaluates training provider suitability on the basis of their subject matter expertise, experience in training, and academic credentials.

◆   **Training of trainers**

The project has begun to take steps to enhance local capacity to provide this type of training to meet recurrent demand. A Master Training Course was being offered during the team's visit to a group of professional trainers, some affiliated with organizations, others free-lance trainers. Alumni of the three-course series will form part of the "local training providers" the project routinely contacts to provide training in-country.

◆   **Evaluation of training to date**

The project manager notes that all courses are oversubscribed, attesting to demand for training among local entrepreneurs. Each course is evaluated at its conclusion: each course is evaluated using a course-specific instrument, and indicators for course success are derived from the objectives for the course.