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66671

THE ENTERPRISE PROGRAM
WORK PLAN
PROJECT YEAR I (1985 - 1986)

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I. OVERVIEW/BACKGROUND

There is considerable evidence that there is a need and growing unmet demand for family planning services in the Third World. The Enterprise Program is a response to the problem and its substantial resources will be directed toward assisting the private sector to initiate or enhance the development of high quality, voluntary family planning services--supplementing public sector and other activities already underway. Both profit-making agencies as well as non-profit agencies and associations (PVOs/NGOs) will be supported under this new initiative. To the extent possible, collaborating groups will be encouraged to improve or expand services only where there is good prospect for the activities becoming self-supporting and independent of international donor assistance.

The underlying principle of the program is that the achievement of program objectives will benefit all concerned in the Third World. Individuals and couples receiving the services will attain enhanced freedom of reproductive choice through greater access to services, more variety in service delivery options, greater convenience, and better quality of care. Participating private voluntary non-profit organizations will improve their management skills to enable them to achieve their organizational objectives at reduced cost. For-profit organizations will benefit in a number of verifiable ways, including reduced health care costs (particularly maternity and sick leave benefits), through a healthier and more efficient work force and improved ties with labor and government. Governments stand to benefit through reduction of stress on already overextended health services, greater efficiency and access to underserved groups, and through testing of new approaches. It is also possible that, in certain cases, the program could assist governments to achieve fertility reduction and demographic objectives through significant increases in the numbers of acceptors or contraceptive prevalence rates.

While the private sector is usually the most dynamic sector, even in countries experiencing economic and social crises, private sector (i.e., PVO and for-profit organizations) infrastructures have been un- or underutilized in the provision of family planning services. The Enterprise Program staff is committed to aggressively pursuing creative and innovative approaches to private sector involvement and to developing, enhancing, and disseminating those program designs and strategies which have been used on a smaller scale in the recent past. It is recognized that this approach has not yet been completely field-tested and that private sector family planning activities in the "for profit" area of family planning are still experimental in most parts of the world. It is recognized also that some groups and individuals are not at all well disposed to collaborating with or supporting a major new and somewhat unorthodox approach to population and health problems such as the Enterprise Program. It is hoped that our approach, which emphasizes innovation and moderate "risk taking," while remaining sensitive to the local environment, will achieve significant and measurable results.

II. OBJECTIVES

The Enterprise Program objectives are two-fold:

Objective #1: To increase the involvement of for-profit entities in the delivery of family planning services, as evidenced by:

- / -

- o Increased number of firms which incorporate family planning among the services which they directly provide to their employees;
- o Increased number of firms which incorporate family planning among the services indirectly (e.g., through expanded insurance coverage) provided to their employees;
- o Increased number of private medical service providers supplying family planning services and commodities (e.g., HMOs, group practices, pharmacies, hospitals, and clinics);
- o Increased level of private sector advertising, marketing, distribution, and promotion of family planning services and commodities; and/or
- o Increased level of active participation of multinational firms, corporations, industries, companies, labor organizations, and other lead agencies in private sector development in the promotion of family planning.

Objective #2: To help improve the efficiency and effectiveness of selected private voluntary organizations with family planning service objectives in AID-recipient countries, as evidenced by:

- o Improved service quality;
- o Increased volume of service;
- o Reduced cost per acceptor;
- o Improved service delivery;
- o Higher continuation rates;
- o Expanded coverage of underserved groups; and/or
- o Increased level of participation of private voluntary organizations at headquarters and regional levels in Third World family planning programs.

III. STRATEGY

The JSI project proposal (particularly Sections II,C,D; III,5,6,7, 8,9; and IV, A-I) provides a useful and detailed explanation of the essential elements of the Enterprise Program's planning process and strategy for achieving its five-year objectives and contractor deliverables.

This work plan focuses entirely on first year strategies and tasks. To lay a sound groundwork for a rapidly expanding program, it is especially important to accomplish two things in the first year. First, the Enterprise Program must initiate a certain number of sub-projects likely to have a demonstration or ripple effect to broaden the program's experiential base and establish an acceptable "track record" among host country agencies, other cooperating agencies, and AID field staff. Second, the program must develop its management systems, particularly for program development and monitoring, data collection, and reporting, and protocols for evaluation, technical assistance, and planning.

In order to enable the Enterprise Program to proceed efficiently and achieve its first year tasks, it will focus on a limited number of key countries. In selecting these countries, efforts will be made to be responsive to the AID Office of Population, Family Planning Services Division (FPSD) Resource Allocation Plan, which stresses regional balance and ranks countries in priority order. Other criteria which will be utilized include: USAID Mission interest (especially as reflected in response cables to the RFP and Contract Announcement Cables), the existence

and/or supportiveness of AID Population Officers, positive government policy, towards public and private sector family planning (or the likelihood that policies might be altered favorably), characteristics of the NGO sector (particularly the amenability of IPPF-affiliated organizations to technical assistance inputs in the management area), the strength of the private health sector, including HMOs, the strength of the industrial or large scale agribusiness sector (and corresponding health networks), overall demographic and social conditions in the country (i.e., whether it is a "high-impact" country or a policy leader in a region), viability and growth potential of commercial sector distribution of contraceptives (pricing, import restrictions, etc.), existence of potentially complementary and non-duplicative efforts by other Cooperating Agencies (SOMARC, FPIA, Pathfinder, Population Services, etc.) or international agencies (the World Bank, SIDA, UNFPA, etc.), and, finally, previous contacts or a country presence by JSI, its contractors, and cooperating agencies.

A tentative list of potential first year focus countries is as follows:

Latin America and the Caribbean

Brazil
Colombia
Ecuador
Mexico
Peru

Africa

Kenya
Gambia
Nigeria
Zambia
Zimbabwe
Morocco
Senegal

Asia and the Near East

India
Indonesia
Pakistan
Philippines
Bangladesh
Turkey

Additional countries under consideration for first year approaches are Papua New Guinea, Haiti, Nepal, and a number of others. During later years additional countries will be targetted as policies change or opportunities present themselves.

A broad interdisciplinary approach, with teams with a variety of skills traveling to each country, should help ensure that, by the end of PY1, the Enterprise Program's portfolio of activities in process or under development is diverse. In those instances where a visit by a core staff team is not warranted arrangements can be made to provide consulting or other assistance. Cooperation with JSI (Boston) and JSI's REACH project will be emphasized. A continuing dialogue with the TIPP's project will be encouraged. In addition to drawing upon the program's considerable in-house expertise, a concerted effort will be made to draw upon the strength of existing cooperating agencies (CAs), both for areas where collaborative

efforts would be successful and for appropriate management information and program monitoring systems. Also, the Enterprise Program will attempt to capitalize on, and appropriately focus, the intense interest in the program by providing presentations to AID missions, other CAs and large private voluntary agencies, labor movement leaders, and leaders in the for-profit sector, in both the United States and in AID-recipient countries.

IV. FIRST YEAR MAJOR TASKS

The Enterprise Program plans to complete seven major tasks in the first project year (PY1). They are as follows:

1. Develop, plan, and award a minimum of six (6) subprojects in three regions. (The life of the project [LOP] target is eighty [80] subprojects; approximately 50 in the PVO sector and 30 in the for-profit sector.)
2. Respond to approximately twenty (20) person-months of requests for Enterprise Program-relevant technical assistance (e.g., business and human resource management, income generation, accountability), including two micro-computer technical assistance assignments. (The LOP numbers are 160 person-months of technical assistance and ten [10] micro-computer placements.)
3. Select sites (in conjunction with AID) and plan, conduct, and initiate evaluations of two (2) multi-country workshops for 10-15 or more participants each. (The LOP number of workshops is ten.)
4. Select topics (in conjunction with AID), develop and initiate field testing of two (2) training modules on Enterprise Program-specific topics. (The LOP number of training modules is three [3], with all originally scheduled for the first year. The program staff have decided to defer at least one to PY2 when more information is available on sub-project training needs.)
5. Design and implement systems and guidelines for sub-project management and administration, monitoring, and evaluation. Prior to the end of the first year, it is expected that the site and staff composition for the first regional (field) office will have been agreed upon.
6. Publicize the Enterprise Program and coordinate efforts with other agencies and AID through preparation of informational materials, mission and agency presentations, participation at coordination meetings, briefings with appropriate public and private sector leaders and the initiation of a project newsletter.
7. Establish the Enterprise Program office in Rosslyn, and design and implement office administration and MIS (based on existing JSI systems) to enable the project to be efficient, responsive, and accountable, and to produce reports on a timely basis.

In subsequent sections, each of these major tasks will be described in more detail and broken down into sub-tasks and activities. Gantt charts will be provided to summarize activities planned. A draft nine-month travel

schedule is provided with the team composition noted as is a preliminary list of country "backstopping assignments" and a draft functional and organogram.

Major Task #1: Develop, plan, and award a minimum of six (6) subprojects to private sector entities in agreed-upon countries in three regions.

First year target countries, as indicated previously, were selected based on a number of specific criteria. In preparing a draft nine-month internal travel schedule, additional consideration was given to choice of countries where either potential subproject ideas are already partially developed (i.e., by Enterprise Program staff, AID, or host country agencies) or where a variety of different types of project requests exist.

Detailed guidelines for project preparation and project selection have been elaborated. The criteria include the following:

1. Evidence of substantial commitment and capability to deliver family planning services;
2. Evidence of substantial service recipient contact network and potential for expansion of coverage in the future;
3. Evidence of need for subproject resources to adopt, expand, or improve the quantity or quality of family planning services and/or management and efficiency with which family planning services are delivered;
4. Evidence of ability to absorb and effectively utilize subproject resources effectively and management capability to sustain gains in service delivery capacity or efficiency in the future; and
5. Evidence of significant potential demonstration effects in the target country or community or in other countries.

Prior to country visits, depending on time and availability of information material, background will be prepared in each country. This may include, in summary form, analyses of the general country situation; demographic trends and population policies; economic status and major for-profit entities; private voluntary organizations; status of family planning programs in government, private, and commercial sectors; AID and other donor priorities and programs; and initial ideas for country strategies and potential projects. Contact lists will be initiated. Sources of information for background papers include trip reports, situation reports (including CDSSs) from AID and other CAs, as well as a variety of sources used by the international business community. Pre-trip information gathering or briefing interviews will be sought with a range of individuals with first-hand country experience, including AID bureau experts, CA country representatives, headquarters staffs of large companies or PVOs, and representatives from Chambers of Commerce, the ILO, World Bank, embassies, etc. The purpose of the background information gathering is to complete as much of the "groundwork" for visits as possible prior to the trip, so that the actual time in-country can be used as efficiently as possible.

When possible, prior to a visit, letters will be sent to key contacts, explaining the program and securing appointments. Efforts will be made to secure introductions to managers of large multinational corporations

with country operations where this seems useful. AID concurrence for travel plans will be sought on a timely basis. The Program Administrator will monitor compliance. A scope of work for each country trip noting the approximate dates of the visit, team composition, trip objectives, list of contacts will be prepared prior to each trip and sent to the CA. AID briefings will take place in-country and with the CTO upon completion of the trip. Follow-up letters will be sent to individuals in organizations contacted during the trip.

An initial travel schedule has been prepared (see Appendix I). Initial visits, called Assessment Visits, will be made by teams whose composition will vary according to the nature of the country and the objectives to be accomplished. Teams are constituted to include a senior project person and may have a balance of family planning, finance, and business skills, etc. Language and prior experience or contacts will be taken into account as teams are formed. In order to assure senior staff coverage in Rosslyn during team travel abroad, it has been agreed that, ideally, Chester or Jeffers should be in Rosslyn at any given time. The same is true for Montague and Harris. Inputs from staff with medical and financial expertise will be more heavily emphasized in second and third trips to a given country.

The purpose of the "assessment" or project identification visits is to:

1. To initiate and ultimately finalize a strategy for Enterprise Program work in that country;
2. Introduce the Enterprise Program to AID officials and representatives of government, PVOs, and for-profit entities in-country;
3. Follow up on country contacts identified through background paper preparation and correspondence; and
4. Negotiate mutual understandings on proposed projects (or technical assistance requests) and, if feasible, prepare project concept papers and initiate project proposal preparation activities.

In some countries where the Enterprise Program expects to be active but which are in earlier stages of readiness, shorter visits will be made (i.e., Pre-assessment Visits) by one or more team members. Proximity to countries where Assessment Visits are scheduled is a key criterion. These will be short, introductory visits. Attendance at conferences or meetings by program staff in the U.S. or abroad may also serve the same purpose.

Pre-assessment, assessment, and proposal preparation visits will be followed, in due course, by Start-Up Visits (to award grants, confirm terms, and assist agencies to initiate project activities) and Implementation Assistance Visits (for monitoring and technical assistance). It is also expected that certain subproject staff may participate in the Enterprise Program-sponsored workshops. (See Task #3).

Major task #5 enumerates systems which need to be designed for subproject monitoring and proposal processing. Close monitoring through the approval process and appropriate technical inputs when subprojects are approved will be given priority.

Major Task # 1: Develop, plan, and award a minimum of six (6) subprojects in three regions.
 (The life of project target is 1980; approximately 50 in the PVO
 and 30 in the for-profit sectors.)

Sub-Tasks	1985			1986							Person(s) Responsible		
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul		Aug	Sep
1.1. Prepare "draft" workplan.	x												Montague, Harris, Jeffers
1.1. Select "focus countries"		x											Montague, Harris, Jeffers
1.2. Prepare guidelines for subproject preparation.				x									Staff
1.3 Prepare background papers for visits.												x	Country Coordinators and Team Leaders
1.4 Meet with U.S.-based population groups, other agencies, donors, for briefings and sharing of information.					x								Country Coordinators and Team Leaders
1.5 Meet with headquarters staff of companies, PVOs, Chambers of Commerce, etc., for pre-trip briefings												x	Country Team Members
1.6 Write contacts in countries to be visited												x	Montague/Team Leaders
1.7 Draft travel schedule				x									Harbick/Montague
1.8 Conduct first quarter visits		x											Teams
1.9 Request travel concurrence, monitor, revise, and adjust travel schedule quarterly												x	Harbeck
1.10 Conduct second quarter visits						x							Country Team Members

Major Task #2: Respond to approximately twenty (20) person-months of requests for Enterprise Program-relevant technical assistance.

During its first year, the Enterprise Program plans to provide approximately twenty (20) person-months of program-relevant technical assistance--including the installation of two (2) micro-computer systems. Personnel for this project phase will be drawn both from the Program staff and a consultant list in existence and being expanded.

Technical assistance assignments will be initiated in several ways: technical assistance based on subproject agreements negotiated at the time of proposal development and contract execution, technical assistance requested independently through private sector entities, or program-related technical assistance requested by AID missions. At the outset, it is difficult to determine the level of "ad hoc" technical assistance that will be requested or provided but, based on cable traffic and meetings, it appears that the number of requests generated by this means will be considerable and will grow as the Program becomes better known. For sub-projects, it is anticipated that each will require a variety of types of technical assistance; for example, family planning program development, accounting, commodities management, information systems, etc.

Criteria will be developed to evaluate and prioritize incoming requests for technical assistance and a project staff member will coordinate these technical assistance activities. The evaluation will include a review of staff and consultant capabilities, local organizational needs, and AID and project goals. A higher priority will be assigned to those technical assistance activities which would provide maximum benefits for project resources invested. A proportion of program resources will also be reserved to respond for "ad hoc" requests for assistance from the field.

The Enterprise Program has a strong capability to provide technical assistance in computer applications for family planning programs. This activity will be organized by William Felling of JSI-Boston, a computer specialist. It is expected that one or more of the subprojects or other agencies will be interested in this particular type of technical assistance.

Once technical assistance requests are received, prioritized, and scheduled, scopes of work will be developed. During the preparations of the scope of work for the particular technical assistance assignment, staff and consultant will identify required inputs necessary to accomplish the task(s). Staff time, materials, training requirements, and evaluation procedures will be incorporated into the scope of the work. The scope of work will include a time-phased schedule of events required to accomplish the task. Upon completion, this plan will be reviewed by and coordinated with appropriate individuals and institutions, particularly AID/Washington, the local Mission, PVOs, and for-profit organizations.

Scopes of work and formats for consultant or staff reporting will be designed as much as possible to allow for each engagement to be evaluated based on the completion of the tasks. Each technical assistance assignment will be supervised by the technical assistance coordinator. The technical assistance coordinator will also monitor the inputs to evaluate the appropriateness and effectiveness of the technical assistance. JSI has

developed extensive management systems for monitoring technical assistance provided in their domestic practice. These systems will be adapted and implemented in the Enterprise Program.

Toward the end of Project Year 1, the Project Director will review the range of technical assistance provided to assess its overall effectiveness at meeting Program objectives and to plan for additional work in the Second Year.

Major Task #2: Respond to approximately twenty (20) person-months of Enterprise Program-
relevant technical assistance

Sub-Tasks	1985			1986					Person(s) Responsible				
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May		Jun	Jul	Aug	Sep
2.1 Develop criteria for TA priorities					x								TA Coordinator*, Montague, Jeffers, Harris
2.2 Review initial field requests and prepare TA Guidelines		x											TA Coordinator (Elliot)
2.3 Prioritize initial requests					x								TA Coordinator, Montague (in liaison with AID CTO)
2.4 Identify required inputs					x								TA Coordinator
2.5 Develop scopes of work									x				TA Coordinator, Program Staff
2.6 Coordinate with appropriate individuals/organizations												x	TA Coordinator/Montague
2.7 Document procedures												x	TA Coordinator, Harbick
2.8 Implement TA												x	Consultants, Enterprise Program Staff
2.9 Evaluate TA assignments												x	TA Coordinator, Montague, Jeffers, Harris
2.10 Review TA component												x	TA Coordinator, Montague, Harbick

* Technical Assistance Coordinator

Major Task #3: Select sites and plan, conduct and evaluate two (2) multi-country workshops for 10-12 participants each.

During the first year of operation, two multicountry workshops will be developed and conducted with the following purposes:

- o To share and build on existing successes and experience in the private sector;
- o To respond to needs identified in the early assessment phases of the program;
- o To highlight the primary objectives of the Enterprise Program, i.e.:
 - increasing private sector, for-profit involvement in family planning
 - increasing involvement of non-profit organizations which are not now involved in family planning
 - improving the management effectiveness and efficiency of private voluntary organizations and possibly other non-profit, non-governmental organizations involved in family planning
- o To reinforce and highlight Enterprise Program activities in two regions (Africa and Latin America); and
- o To develop and test training modules for wider application (see Major Task #3).

In the context of training and workshops, the Enterprise Program is in a position to make unique contributions to family planning efforts, including a focus on organizational improvement using a "vertical" strategy, whereby organizational change involves all levels from top policy makers at direction level to field technicians, and training which includes all aspects of needed improvements, including managerial and planning skills development, financial management, technical skills, service delivery, etc. Using this "vertical," holistic approach, the Enterprise Program can serve as a potent synergistic collaborator with a wide range of other agencies that have targeted their training to specific "horizontal" aspects of programs such as financial management, policy decisions, or service delivery skills.

While the Enterprise Program must remain open to unexpected needs, shifting priorities, and new opportunities, initial assessment suggests two opportunities which can provide a base for achieving the purposes outlined above, as well as helping establish the range of the Enterprise Program's potential collaborations, contributing to building a network of collaborators and clients, and initiating a process which will generate more problem-solving approaches and further requests for services.

Given this, two workshops are currently planned. They are planned to take place in Kenya and Brazil. A summary of objectives, outputs, and logistics data follows.

Workshop #1: Nairobi

- Objectives:
- (1) Share (survey) current successes in field of employee-based family planning programs and advantages of such programs.
 - (2) Stimulate the demand for such programs or projects in other LDCs.
 - (3) Demonstrate Enterprise Program's potential to contribute to increased private sector involvement in family planning.
 - (4) Build on experiences gained by JSI's successful Kenyan project.

Timing: Mid- to late-summer 1986 (August)

Duration: 3 days

- Participants:
- (a) Representatives of selected groups involved in employee-based programs in Asia or Africa
 - (b) Potential private sector subproject organizations

Collaborators: JSI/ILO/U.S. Department of Commerce

Keynote Speaker: The Honorable Mwai Kibaki, Vice President, Republic of Kenya

Logistics: JSI Office-Nairobi, in collaboration with a Kenyan training/consultation organization.

- Products:
- (1) Three-Four new project ideas.
 - (2) Module on integrating family planning into employee benefits packages (see Workplan section 4).
 - (3) Monograph/proceedings of Workshop.

Workshop #2: Bogota, Colombia

- Objectives:
- (1) Share and survey current successes of PVOs which are becoming more self-sustaining (e.g., Profamilia).
 - (2) Stimulate demand for technical assistance by PVOs in cost-cutting and revenue generation.

Timing: End of FY 1986 (September)

Duration: 3 days

Participants: CEOs of locally-based (indigenous) PVOs in selected countries.

- Products:
- (1) Four to five technical assistance or project requests.
 - (2) Module on cost-cutting and revenue generation for PVOs (see Workplan section 4)

Major Task #4: Select topics and field-test two (2) training modules on Enterprise Program-specific topics.

The development of modules on program-specific topics will be based on solid information regarding needs, involve clients in the development and testing process to assure acceptability of the final product, take into account experiences of successful existing programs, and be linked if possible to the multicountry workshops detailed in Major Task #3.

Given the large numbers of countries targets by the Enterprise Program, the task of collecting information in the United States and in the field on perceived problems, priorities, and existing materials and resources to address these problems is complex. Although consultants are proposed for the actual preparation of modules, it is expected that program staff will play a key role in information gathering and marketing, as well as in field-testing the modules and supervising revisions, as appropriate. Module development will be coordinated with workshop development. Some field testing may be accomplished by program staff and consultants during subproject development or technical assistance visits. The multicountry workshops will also be used to field-test the modules.

Knowledge and skills required in potential consultants for module preparation include the following:

- o Knowledge of existing training efforts;
- o Document production capacity;
- o Language ability (French, Spanish, or Portuguese, depending on situation);
- o Training/technical assistance materials design skills;
- o Family planning program and business management skills;
- o Previous LDC experience (in several countries); and
- o Contacts with existing training facilities in countries where workshops will be held.

Topics for modules will be selected in consultation with Regional Bureaus and the CTO. Suggested topics will be presented to the CTO, and final topic selection will take place in March-April. This will allow for information gathering during the initial round of assessment visits. At this time, suggested topics include cost accounting, developing, planning, and implementing a family planning service delivery component in a commercial enterprise, fund raising, community financing, and community computer applications in family planning program management. It may be desirable to propose that the first module provide a framework for subsequent, "off-the-shelf" type modules, by providing a general overview on business management issues, tools, and skills needed to accomplish private sector family planning objectives along with business rationale. (This would draw upon information gathered by the Tipps program, as well as existing successful efforts.) Another module is expected to focus on the PVO sector, particularly fund raising and self-sufficiency issues. Two

specific topics which are being further roughed out are "Integrating Family Planning into Employee Benefit Programs," and "Cutting Costs and Increasing Revenues of Family Planning PVOs."

Major Task #4: Select sites and plan, conduct, and evaluate two (2) multicountry workshops.

Sub-Tasks	1985				1986					Person(s) Responsible			
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun		Jul	Aug	Sep
4.1 Information gathering - collection of suggestions and existing materials - review materials/suggestions - elicit staff suggestions - obtain CTO input - prepare checklist for travelers													Bramble/Raleigh/O'Brien " " " "
4.2 Marketing - preliminary product development - announcement correspondence - field assessment, problem identification, priority setting - topic selection - site selection - approval													Bramble/Raleigh/O'Brien " " Bramble Bramble and Staff " Montague/Jeffers/Harris
4.3 Design workshop program and materials													Bramble and Staff
4.4 Logistical preparation - arranging sites and participants - develop/disseminate registration information													Bramble, Staff, Subcontr. Training Organization Montague/Bramble

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Major Task #5: Design and implement systems and guidelines for subproject management and administration, monitoring, and evaluation.

In order to guide its subcontracting process and to manage, monitor, and evaluate subprojects, the Enterprise Program will develop a standard subcontract and detailed administrative procedures and guidelines. As a first step in this process, AID regulations and related documents will be reviewed and discussions with appropriate AID personnel will be conducted to clarify AID requirements relative to subprojects and the subcontracting process. Other agencies or organizations which contract with subprojects will be contacted and interviewed and samples of their contracts and procedures will be obtained as available.

Guided by AID requirements and the sample contracts and procedures obtained from other organizations, the Enterprise Program Administrator will prepare a standard contract, a draft outline of the subcontracting process, and a draft outline of subproject administration and evaluation, complete with draft procedures for managing, administering, monitoring, and evaluating subprojects. This first draft is targeted for the middle of January and will be distributed to program staff for review and comment. Based on the advice received, the Project Administrator will revise the standard contract and subproject system and procedures as appropriate. Achieving a final draft of the standard subcontract, the subcontracting procedures and procedures for subproject management, administration, monitoring, and evaluation is targeted for the end of January 1986. During the first year, the systems and procedures adopted will be monitored and, as necessary, revised, with the revisions following the review and process of the original drafts.

By the end of the first year, it is expected that an internal handbook will have been developed, documenting the following procedures and processes:

- o Project proposal preparation, format, and guidelines;
- o Trip report format and guidelines;
- o Project approval process;
- o Grant award procedures;
- o Audit guidelines;
- o Financial and management reporting and monitoring;
- o Technical assistance guidelines;
- o Commodities ordering and shipping procedures; and others as appropriate.

In addition, by the end of the year, it seems likely that the site for the first (probably Asian) Regional Office for a project will have been selected.

Major Task #5: Design and implement systems and guidelines for subproject management and administration, monitoring, and evaluation.

Sub-Tasks	1985			1986					Person(s) Responsible					
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May		Jun	Jul	Aug	Sep	
5.1 Document AID requirements for subproject management			x										Harbick, Montague	
5.2 Review existing systems and contracts used by other organizations				x									Harbick, Jeffers, Harris, and Assigned Staff	
5.3 Develop draft system designs guidelines				x									"	
5.4 Review draft guidelines				x									Harbick, Staff	
5.5 Revise preliminary systems as appropriate												x	Harbick	
5.6 Prepare final systems and draft guidelines												x	Harbick, Montague, Lamstein, Owens	
5.7 Implement systems													x	Harbick, Montague
5.8 Monitor, revise systems as necessary													x	Harbick, Montague, Harris, Jeffers

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Major Task #6: Publicize the Enterprise Program and coordinate efforts with other agencies and AID through preparation of informational materials, mission and agency presentations, participation at coordination meetings and briefings with appropriate public and private sector leaders.

This task encompasses the development of descriptive and promotional written materials about the Enterprise Program and the establishment and maintenance of coordination with related organizations. The sub-tasks that comprise this task are as follows:

1. Design program stationery;
2. Develop program brochure;
3. Develop audience-specific introductory letters;
4. Develop audience specific presentations with visual aids as appropriate;
5. Compile program mailing list;
6. Hold introductory meetings with key AID officials;
7. Establish coordination procedures with related organizations;
8. Attend coordinating meetings with related organizations; and
9. Decide upon appropriate format of newsletter.

The Enterprise Program needs the full range of stationery supplies. These include: letterhead, business cards, coversheets, etc. The design of this stationery includes consideration for style, color, and format. Professional commercial artists will be asked to put forward suggestions, a selection made, and the supplies ordered.

A brochure will be developed to be used as an adjunct to all discussions about the Program. It will describe the goals, activities, and participants in the Program and clearly display the Program's office address, telephone and telex numbers. The content of the brochure will be developed by Program team members and submitted to AID for review. The design of the brochure will be developed in collaboration with a commercial artist. It is anticipated that the brochure will be printed in English, French, and Spanish.

Letters introducing the project will be sent to certain categories of people. These categories will include: USAID Mission staff; multi-national organizations, such as PVOs, banks, and other donor agencies; and other AID contractors and grantees. These letters will explain the goal and purpose of the Enterprise Program, illustrate how the Program might serve the audience, tell the recipient how they may contact the Program, and address other issues of interest or concern to the audience.

As a basis for discussion and explanation in face-to-face situations, Enterprise Program team members will need to use explanatory materials.

These presentations will be designed to meet specific needs, defined in terms of audience and location. Likely audiences include host country government officials, indigenous PVOs, providers of health care, for-profit businesses, and employee organizations. A generic set of materials will be developed and specific adaptations made as the need is anticipated.

An Enterprise Program mailing list will be compiled, based on input from team members, business association lists, etc. This list will be categorized and used to guide the distribution of Program materials. The list will be revised continually as the Program proceeds.

Formal meetings will be held with key AID officials for the purpose of introducing the Enterprise Program and the Program staff. The Project Director will initiate these meetings in close collaboration with the AID CTO. It is anticipated that meetings will be held with Population and Private Enterprise Officers of each Regional Bureau, officials of the Office of Population, the Office of Health, the Bureau of Private and Voluntary Coordination, and the Bureau of Program and Policy Coordination.

A number of other organizations share goals and procedures with those of the Enterprise Program. Members of the Enterprise Program team will establish internal liaison with their counterparts in these organizations. In addition, more formal procedures will be established for sharing Program information and documentation.

Selected Enterprise Program staff will attend and participate in coordinating meetings of such organizations as the American Public Health Association, Population Association of America, and the National Council for International Health, as well as meetings of USAID officers according to a schedule prepared by the Project Director. In conjunction with other Enterprise Program activities, the staff will seek out opportunities to attend meetings with relevant organizations overseas. Where appropriate, Program staff will also attend meetings and workshops outside of the traditional family planning circle, such as business associations of multinational organizations (e.g., ILO, Pharmacists Association, Young Presidents Association, etc.) to seek opportunities to inform them of the Program and the opportunities for private sector promotion for family planning.

Major Task #6: Publicize the Enterprise Program and coordinate efforts with other agencies and AID through preparation of informational materials, mission and agency presentations, participation at coordinating meetings and briefings with public and private sector leaders.

Sub-Tasks	1985			1986					Person(s) Responsible				
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May		Jun	Jul	Aug	Sep
6.1 Design program stationery			x										Hayes, Elliott, Lamstein
6.2 Develop program brochure				x									Hayes, Elliott, Montague
6.3 Develop introductory letters			x										Elliott, Montague
6.4 Develop presentations					x								TBD
6.5 Compile program mailing list												x	Harbick, Enterprise Staff
6.6 Hold introductory meetings with AID officials			x										Montague, Jeffers, Harbick, Harris
6.7 Establish coordination procedures with related organizations						x							Harris, Elliott, Harbick
6.8 Attend coordinating meetings with related organizations		x		x			x			x			Staff as designated
6.9 Develop, design, obtain approval for, and reproduce a project newsletter												x	Montague, Staff, JSI/Boston

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Major Task #7: Set up the project office in Rosslyn, and design and implement office administration and MIS based on existing JSI systems to enable the project to be efficient, responsive, and accountable, and to produce reports on a timely basis.

Among the tasks for implementing the Enterprise Program is establishing and formalizing relationships with the Program subcontractors and affiliated organizations. This requires arranging meetings, developing and obtaining approval of standard subcontracts, executing contracts, and establishing personnel and financial reporting requirements and systems.

During the early months of operation, a major portion of the Enterprise Program's efforts will be directed toward the establishment and organization of the program office. A location for the office will be selected and a lease negotiated. Prior to this, however, the Program will identify and establish a temporary office in Rosslyn, pending the process of establishing a full-time office. Program staff will be oriented and assigned start-up activities. After a review of AID documents related to the program and discussions with appropriate AID personnel, JSI project reporting requirements will be documented and schedules for deliverables will be developed. In addition, the administrative requirements of the program will be elaborated, documented, and implemented.

Based on the administrative and MIS systems in use at JSI, guidelines and procedures for the administration of the program and the management of the program office will be developed. These administrative requirements will involve a number of tasks, including establishment of payroll and personnel procedures, selection and installation of telecommunications capability, establishment of banking relationships, implementation of decentralized purchasing procedures, adaptation and installation of JSI information systems, development of procedures for authorization of program related travel, and establishment of relationships with travel agents, visa services, etc. These procedures will be reviewed by program staff and JSI senior staff and revised, as appropriate. During the life of the program, these systems, procedures, and guidelines will continue to be reviewed and revised as necessary. These procedures will be designed to guide the program operations and to ensure efficiency and responsiveness to program demands.

In addition to the contractual, administrative, and location issues, developing the program management system and procedures will be a major task in Project Year 1. This will require the integration of the Enterprise Program into the JSI automated project management and accounting system, including the development and monthly processing of the Enterprise Program revenue and expense statements, adaptation and implementation of JSI personnel management system for the Enterprise Program, implementation of invoicing system to AID/Washington, and subsequent revision of these systems, as appropriate.

Prior to initial field trips, a series of briefing sessions will be conducted for and presented by/to Program staff. The purpose of these in-service briefing activities is to obtain a minimum common informational base and working vocabulary in a group with diverse skills. The topics for these sessions are expected to include information systems; family planning service delivery; subproject management, financing, and reporting;

commodities management; cost accounting; proposal development; and community financing.

It has been decided to initiate a system of both functional and regional assignments related to project activities. As per the proposal, Montague is Project Director, with two deputies: Harris, who is largely responsible for family planning and the non-profit private sector, and Jeffers, who covers the profit-making sector. Harbick will be responsible for systems development, reporting to AID, etc. Other staff members have been allocated individual country assignments, either as country (visit) team leaders, country (backup) coordinators, or "functional assignments." All initial assignments are, of course, subject to change. (See Appendix 2.)

Major Task #7: Set up the project office in Rosslyn, and design and implement office administration and MIS based on existing JSI systems to enable the project to be efficient, responsive, accountable, and to produce reports on a timely basis.

Sub-Tasks	1985			1986							Person(s) Responsible		
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul		Aug	Sep
7.1 Mobilize and orient staff			x										JSI Boston Staff
7.2 Establish payroll and personnel procedures		x											JSI Boston Staff
7.3 Meeting of subcontractors			x										Lamstein
7.4 Arrange temporary office	x												Lamstein/Hayes
7.5 Locate/lease full-time office		x											Senior Project Staff
7.6 Develop and approve standard subcontract		x											Lamstein
7.7 Execute subcontracts		x											Lamstein
7.8 Establish full-time office					x								Martinez, Harbick
7.9 Develop and implement project management and accounting system												x	Harbick/Lamstein/Montague
7.10 Adapt and implement JSI project administration systems												x	Harbick/Montague/Lamstein
7.11 Conduct in-service orienting		x											Project Staff

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APPENDIX II

A. COUNTRY COORDINATORS

1. Nigeria - Chester
 2. Philippine Islands - Cantlay
 3. Indonesia - O'Brien
 4. Mexico - Hayes
 5. Kenya - Montague
 6. Zambia - Harris
 7. Zimbabwe - Harris
 8. Bangladesh/Pakistan - Elliot
 9. Brazil - Harbick
 10. Turkey - Montague
 11. Egypt - Jeffers
 12. Ecuador - Hayes
 13. Peru - Hayes
 14. Colombia - Raleigh
 15. India - Jeffers
 16. Morocco - Montague
 17. Gambia - Harris
 18. Senegal - Cantlay
 19. Papua New Guinea - Jeffers
 20. Haiti - Montague
- Others to be added as necessary

B. FUNCTIONAL ASSIGNMENTS

1. Demography/Statistics/Family Planning Evaluation - Novak
2. Technical Assistance Coordinator - Elliot