

PD-ABI-437

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UNITED STATES INTERNATIONAL DEVELOPMENT COOPERATION AGENCY  
AGENCY FOR INTERNATIONAL DEVELOPMENT  
Washington, D. C. 20523

JAMAICA

**PROJECT PAPER**

UNIVERSITY OF THE WEST INDIES  
MANAGEMENT EDUCATION

AMENDMENT NUMBER 2

AID/LAC/P-855  
CR-393, 597

PROJECT NUMBER: 532-0129

UNCLASSIFIED

AGENCY FOR INTERNATIONAL DEVELOPMENT <b>PROJECT DATA SHEET</b>	1. TRANSACTION CODE <input type="checkbox"/> A = Add <input type="checkbox"/> C = Change <input type="checkbox"/> D = Delete	Amendment Number 2	DOCUMENT CODE 3
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2. COUNTRY/ENTITY USAID/Jamaica	3. PROJECT NUMBER 532-0129
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4. BUREAU/OFFICE Latin America & The Caribbean <input type="checkbox"/> 05	5. PROJECT TITLE (maximum 40 characters) <input type="checkbox"/> UWI Management Education
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6. PROJECT ASSISTANCE COMPLETION DATE (PACD) MM DD YY 1 2 3 1 9 5	7. ESTIMATED DATE OF OBLIGATION (Under "B" below, enter 1, 2, 3, or 4) A. Initial FY <input checked="" type="checkbox"/> 87    B. Quarter <input type="checkbox"/> C. Final FY <input checked="" type="checkbox"/> 95
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8. COSTS (\$000 OR EQUIVALENT \$1 = )						
A. FUNDING SOURCE	FIRST FY			LIFE OF PROJECT		
	B. FX	C. L/C	D. Total	E. FX	F. L/C	G. Total
AID Appropriated Total	364	286	650	3,469	2,181	5,650
(Grant)	364	286	650	(3,469)	(2,181)	5,650
(Loan)	- 0 -	- 0 -	- 0 -	(- 0 -)	(- 0 -)	- 0 -
Other U.S.						
1. Host Country	- 0 -	305	305	3,469	1,450	1,450
2. Other Donor(s)						
<b>TOTALS</b>	364	591	955	3,469	3,631	7,100

9. SCHEDULE OF AID FUNDING (\$000)									
A. APPROPRIATION	B. PRIMARY PURPOSE CODE	C. PRIMARY TECH. CODE		D. OBLIGATIONS TO DATE		E. AMOUNT APPROVED THIS ACTION		F. LIFE OF PROJECT	
		1. Grant	2. Loan	1. Grant	2. Loan	1. Grant	2. Loan	1. Grant	2. Loan
(1) EH	660			4,432	- 0 -	1,200	- 0 -	5,650	-
(2)									
(3)									
(4)									
<b>TOTALS</b>				4,432	- 0 -	1,200	- 0 -	5,650	-

10. SECONDARY TECHNICAL CODES (maximum 5 codes of 3 positions each)	11. SECONDARY PURPOSE CODE
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12. SPECIAL CONCERNS CODES (maximum 7 codes of 4 positions each)									
A. Code									
B. Amount									

13. PROJECT PURPOSE (maximum 480 characters)

To consolidate and advance sustainable development of management education and training at the University of the West Indies, Mona Campus.

14. SCHEDULED EVALUATIONS Interim    MM YY    MM YY    Final    MM YY	15. SOURCE/ORIGIN OF GOODS AND SERVICES <input type="checkbox"/> 000 <input type="checkbox"/> 941 <input type="checkbox"/> Local <input type="checkbox"/> Other (Specify)
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16. AMENDMENTS/NATURE OF CHANGE PROPOSED (This is page 1 of a 1 page PP Amendment)  
 This Project Authorization Amendment increases the amount of LOP funding authorized for this project by US\$1.2 million for a new total of US\$5.650 million and extends the PACD from 9/30/95 to 12/31/95. This increase in authorized funding supports the consolidation of progress to date under Phase II of this project and enhances the sustainability of management education and training at the Mona Campus of the University of the West Indies. The USAID Controller has reviewed and concurred with the methods of implementation, financing, and procurement included herein.

OPPD: Kirk Dahlgren    OEHR: Jerry Wood    CONT: Marjorie Lewinter

17. APPROVED BY	Signature: <i>Robert E. Queener</i> Title: Director, USAID/Jamaica	Date Signed MM DD YY 10 2 23 94	18. DATE DOCUMENT RECEIVED IN AID/W, OR FOR AID/W DOCUMENTS, DATE OF DISTRIBUTION MM DD YY 10 1 1 94
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**PROJECT AUTHORIZATION  
AMENDMENT 2**

Name of Country Jamaica

Name of Project University of the West Indies  
Management Education

Project Number 532-0129

1. Pursuant to Section 105 of the Foreign Assistance Act of 1961, as amended, the University of the West Indies Management Education Project was authorized on September 10, 1987 and amended on April 22, 1990. The original Project Authorization provided US\$2,450,000 in grant funds over a three year period from the date of authorization. The amendment of 1990 authorized an additional US\$2,000,000, thus bringing the total Life of Project Funding to US\$4,450,000. It also extended the PACD to September 30, 1995. In order to further increase the grant funds by US\$1,200,000 and to extend the PACD, the authorization is amended as follows:

**Section 1 is revised to read:**

Pursuant to Section 105 of the Foreign Assistance Act of 1961, as amended, I hereby authorize the University of the West Indies Assistance Project, involving planned life of project obligations of not to exceed US\$ 5,650,000 in grant funds ("Grant"), subject to the availability of funds in accordance with USAID/OYB allotment process, to help in financing foreign exchange and local currency costs for the Project. The planned life of project is eight years and three months from date of initial obligation, i.e. December 31, 1995.

**Section 2 is revised to read:**

The project purpose is to consolidate and advance sustainable development of management and training at the University of the West Indies, Mona Campus.

2. The authorization cited above remains in force except as hereby amended.



Robert S. Queener  
Director  
USAID/Jamaica  
Date:

**Clearances:**

OPPD:KDahlgren:  Date: 2/11/94    OEHR:JWood    Date:  2/10/94  
OPE:WCraddock  Date: 2/10/94    OEHR:NMignott  Date:  2/10/94  
CONT:SHunter    Date:  2/23/94

Drafted:OPPD:GHall:02/09/94 (doc. U:/OPPD/PUB/docs/UWIPP

MISSION OPERATIONS MANUAL

CHAPTER: 200 - DELEGATION OF AUTHORITY TO USAID/JAMAICA      Transmittal Letter: 92-02  
Sub-Chapter:      Supersedes: TL 90-4  
Title: DELEGATION OF AUTHORITY TO USAID/JAMAICA - PROJECT AND PROGRAM ASSISTANCE AUTHORITIES      Date: May 22, 1992  
Responsible Office: DIR

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Attached is A.I.D. Delegation of Authority No. 752 (as amended most recently on August 2, 1991). This Delegation includes the following primary Authorities:

- A. The Authority to Authorize Projects (including non-project assistance).
- B. The Authority to Amend Project Authorizations Executed by any AID Official.
- C. The Authority to Approve Extensions of the Life of a Project.
- D. Implementation Authorities.
- E. Waiver Authorities for Source/Origin/Nationality.
- F. Waiver Authority for Competition under Host Country Contracts.
- G. Waiver of Advertisement Requirements for Host Country Contracts.

The attachment should be reviewed for full information on the above authorities, especially with respect to limitations in their use.

Section II. Authorization Authorities

Except as otherwise specifically provided herein, the following authorities are hereby delegated to the principal officers of LAC Bureau field posts:

A. The authority to authorize a project, if the project:

1. Does not exceed \$20 million over the approved life of project;
2. Does not present significant policy issues;
3. Does not require issuance of waivers that may only be approved by the Administrator or an Assistant Administrator, or if such waivers are required they are obtained prior to such authorization; and
4. Does not have a life of project in excess of ten years.

B. The Authority to amend project authorizations executed by any AID official, if the amendment:

1. Does not result in a total life of project funding of more than \$30 million;
2. Does not present significant policy issues; and
3. Does not require issuance of waivers that may only be approved by the Administrator or an Assistant Administrator, or if such waivers are required they are obtained prior to such authorizations.

C. Prior to the authorization of any project in accordance with paragraph A, a PID or PID equivalent must have been approved, if required by Agency policy or regulation. PIDs and PID equivalent documents must be approved by AID/W unless approval authority is redelegated to the field, except that PIDs for projects not exceeding \$500,000 may be approved by the field post.

D. The authority to approve extensions of the life of a project (PACD extensions), up to a total life of not more than ten years.

E. The principal AID officers responsible for programs in Argentina, Belize, Brazil, Chile, Colombia, Mexico, Paraguay and Uruguay may authorize projects (subject to paragraph II C above) only for recipients other than foreign governments, agencies of such governments and international organizations as defined in Delegation of Authority No. 402, and which do not

2. Agreements. Authority to negotiate, execute, and implement, in accordance with the terms of the authorization thereof and in accordance with applicable statutes and regulations, loan, grant and guaranty (other than Housing Guaranty) agreements, and amendments and other agreements ancillary thereto, for assistance to their respective countries or regions;

3. Host Country Contracts. Authority to approve all borrower/grantee contractors and contracts financed in whole or in part by an AID loan or grant and review and approve requests for proposals and invitations for bids with respect to such contracts; provided, however, that any invitations for bids for construction activities which will be advertised in the United States and which are estimated to be \$500,000 or more first shall be reviewed and approved by a Regional Legal Advisor or GC and by a U.S. direct-hire engineer; and provided further, however, that any invitations for bids for fabricated or made-to-order equipment (e.g., turbines, transformers but not motor vehicles) which are estimated to be \$200,000 or more first shall be reviewed and approved by a Regional Legal Advisor or GC and by a U.S. direct-hire engineer;

4. PIOs. Authority to sign or approve Project Implementation Orders;

5. PILs. Authority to prepare, negotiate, sign and deliver Project Implementation Letters;

6. Conditions Precedent. Authority to review and approve documents and other evidence submitted by borrowers or grantees in satisfaction of conditions precedent under such loan, grant, guaranty agreements, or agreements ancillary thereto; and

7. PASA/RSSAs. Authority to sign statements that proposed PASA or RSSA agreements are exempt from OMB Circular A-76.\*

**B. Waiver Authorities for Source/Origin and Nationality**

Authority to waive, in accordance with the applicable statutes and regulations, including the terms of Delegation of Authority No. 405 and the criteria contained in Supplement B of Handbook 1, source, origin or nationality requirements to permit the procurement of commodities and services (other than transportation services) in countries included in AID Geographic Codes 941, 899, or 935, subject to the following:

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\*OMB Circular A-76 generally allows other government agencies to provide goods or services to AID only if the goods or services cannot be provided by the private sector.

#### E. Waiver of Advertisement Requirements for Host Country Contracts

Authority to waive the requirement that a notice of availability of an IFB, RFTP, RFQ, or prequalification questionnaire be publicized in the Commerce Business Daily or an AID Publication for contracts which are \$500,000 or less in estimated value; provided, however, that this authority shall be exercised only to avoid serious delay in project implementation; and provided further, however, that efforts shall be made in any event to secure proposals, bids, or offers from a reasonable number of potential contractors or suppliers.

[For AID direct contracts the corresponding authority is FAR 5.202 and AIDAR 706.302.70.]

#### Section IV. Redlegation of Authorities

Pursuant to the authorities delegated to me as Assistant Administrator for Latin America and the Caribbean, I hereby delegate all of the authorities set forth in Sections II and III hereof, retaining for myself concurrent authority to exercise any of the functions herein redelegated, to the principal AID officers of the Missions and Posts included in Section I.

A. The authorities delegated herein shall be exercised in accordance with applicable statutes and regulations, including the Foreign Assistance Act of 1961, as amended, and the AID Handbooks and after consultation with a Regional Legal Advisor or GC/LAC, as appropriate, and with appropriate technical and support personnel.

B. The authorities delegated pursuant to Section II and Section III.B, hereof shall not be further redelegated; provided, however, that they may be exercised by the person acting in the capacity of the Mission Director while the latter is out of the country (with my prior approval).

C. Other authorities delegated pursuant to Section III hereof may, in the discretion of the principal AID officer, be further redelegated to his/her deputy, or the individual acting in such capacity or may be exercised by the person acting in the capacity of the principal AID officer while, with my prior approval, the latter is out of the country. In addition, the principal AID officer in all posts except Argentina, Belize, Brazil, Chile, Colombia, Mexico, Paraguay and Uruguay may further redelegate the authorities contained herein in Section III.A 3, 4, 5, 6 and 7 to USAID direct hire staff members as he or she should deem appropriate.

UWI/USAID  
MANAGEMENT EDUCATION PROJECT

PROJECT PAPER SUPPLEMENT  
PHASE II

February 10, 1994

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## LIST OF ACRONYMS

DOMS	Department of Management Studies
EMBA	Executive Masters of Business Administration
EMDP	Executive Management Development Program
EOPS	End of Project Status
FSS	Faculty of Social Sciences
IEMDP	International Executive Management Development Program
IOB	Institute of Business
JAMPRO	Jamaica Promotions Limited
MMDP	Middle Management Development Program
MPSM	Masters of Public Sector Management
PACD	Project Assistance Completion Date
PPS	Project Paper Supplement
SBMDP	Small Business Management Development Program
UWI	University of the West Indies

## I. EXECUTIVE SUMMARY AND RECOMMENDATIONS

### A. SUMMARY

This Project Paper Supplement provides additional resources to consolidate progress to date for activities that will be completed by December 31, 1995, involving a three-month extension of the existing Project Assistance Completion Date (PACD). The fundamental purpose of all activities during these last two years of the Project is to implement a strategy of sustainability (without USAID funding) for critical elements of the project. In pursuit of that purpose, the following objectives will be supported under this Phase II supplement:

enhancement of the graduate degree programs, sponsored research and executive development programs of the Institute of Business (IOB);

upgrading and modernization of the undergraduate business programs, to meet rapidly changing local and international work force demands;

development and installation of an endowment program to support new initiatives in management education;

architectural and engineering design of a new building on the Mona campus that will provide adequate space for the IOB and graduate management education into the twenty-first century;.

divestiture of short-term programs that do not service the mandate of University/IOB management education.

The successes achieved to date have created a foundation of optimism regarding the attainment of a dynamic, sustainable program of management education at the University of the West Indies (UWI). A recently conducted evaluation on the project's progress concluded that accomplishments are substantial and, that while the problems that have been solved are more significant than those yet to be tackled, substantial barriers remain before the original vision can be considered fulfilled with management education on a self-sustaining footing. The University has, in the few months since the evaluation, acted on several recommendations, i.e., operational autonomy for the IOB with a strong role for the private sector in governance, linkage of the IOB to the University through Articles of Affiliation, and dedication of faculty time to the IOB through a system of joint appointments that allows the IOB to draw on the best talent available in the University system. The resources made available under this amendment will support these initiatives with the objective that the IOB will achieve a self-sustaining position by the time of the PACD.

## B. RECOMMENDATION

It is recommended that an additional \$1,200,000 be authorized to accomplish the above objectives. The new life of project (LOP) funding will total \$5,638,000 and the current project assistance completion date of September 30, 1995 will be extended by three months, to December 31, 1995, for all activities. This limited extension is necessary, given the later than expected completion of this design and time required to complete activities envisaged. The cost will not exceed that given in the 1994-95 Action Plan NPD.

## II. PROJECT BACKGROUND AND RATIONALE

### A. BACKGROUND

A lack of adequately trained managers has been consistently identified as a constraint to the sustained growth of the Jamaican economy. This constraint is viewed as pervasive in both private and public organizations where modern professional technical and managerial skills are conspicuously lacking. In response to this constraint, the Project was developed in 1987 to help the UWI play a more effective role in addressing the problem as well as to improve the quality of programs offered by the Department of Management Studies (DOMS). As originally conceived, the project was to be implemented in three phases over a ten year period.

The original PP provided US\$2,450,000 of financial assistance to the University of the West Indies (UWI) to help overcome the shortage of trained managers at the mid and upper levels in Jamaica. The project provided for: (1) technical assistance; (2) training, (3) computer hardware and software, (4) library materials and (5) some modest refurbishing and construction of physical facilities at the Mona Campus. A Mid-Term Evaluation (October, 1989) concluded that, notwithstanding delays caused by Hurricane Gilbert in September 1988, the project was generally on target and that the progress to date was impressive. Based on this evaluation, a Supplement was approved for an additional US\$2,000,000, making a total of US\$4,450,000, to continue the activities started under Phase I, with the exception of the construction component, which was completed.

### B. PROJECT RATIONALE

The original rationale for the project remains valid - it is that the severe shortage of trained mid and upper level managers in Jamaica acts as a constraint to economic development. UWI is well positioned to accept the challenge to address this constraint.

The overall project continues to have high priority for Jamaica in that it aims to provide a cadre of highly trained managers for private and public sector development. The business community is very involved with the Institute of Business (IOB) supported under

the project, and several key entrepreneurs sit on its Board. The University has demonstrated its awareness of the increasing importance of business support for its programs and has increasingly sought a partnership that both draws on private sector resources and reaches out with programs that meet private sector interests. While achievements to date have been impressive, assured sustainability of the IOB requires additional support for a limited time in a few critical areas. The focus will be on development of income streams that will finance all operational costs of the Institute and which will contribute substantially to the real costs of operating the undergraduate management programs.

### **III. PROJECT GOAL, PURPOSE AND ACCOMPLISHMENTS**

#### **A. The Project Goal and Purpose**

The Project Goal is to overcome the shortage of trained managers at the mid and upper management levels of both public and private sector business institutions in Jamaica.

The Project Purpose has been adjusted to sharpen the focus on sustainability; that is: to consolidate achievements and advance sustainable development of management education and training at the University of the West Indies (UWI), Mona Campus. This purpose will be achieved with a quality program that is demand driven, that produces sought-after graduates and that is financed by dependable income streams derived primarily from program clientele.

#### **B. ACCOMPLISHMENTS**

Accomplishments to date are best summarized in the March 1993 evaluation of the Project, as follows:

"Faculty training is on schedule. All those who have been trained have remained at the University. A total of 19 people, 14 at the MS level and 5 at the Ph. D. level will have joined the faculty by 1995 (note: at least 3 additional staff will benefit from this program under this supplement).

The Computer facility is in operation, well utilized, and making possible the changes in curriculum envisioned when the project was designed.

The building addition funded in Phase I is functioning as planned. Space for the Executive MBA and executive programs in general is quite limited and will continue to be a constraint on the size and breadth of the Institute or a Graduate School of Management. (note: design of a new facility, to be financed under this supplement, will build on the earlier accomplishment and contribute to alleviation of this constraint, which has grown out of success).

The Executive MBA is a significant success with excellent prospects for the future.

The undergraduate management program has expanded as planned. Expansion would have been seriously compromised without the faculty resources provided by those trained under the program.

The business community is involved with the Institute and is supportive of the EMBA program, and enthusiastic about the changes that have occurred at the University to emphasize management education and expand its efforts.

The University administration is committed to the goals of the program and has made substantial investments and commitments to its success."

A more detailed description of activities and accomplishments may be found in Annex V.

#### IV. AMENDED PROJECT DESCRIPTION

##### A. FINANCING STRATEGY AND OUTLINE OF ACTIVITIES

Requirements of program consolidation and Mission down-sizing mitigate against a third phase of the UWI Management Education project as originally envisaged. Programs supported by the project are, however, on track and at a watershed in their development. Both market demand and increasing private sector support are leading programs to a takeoff point. In order to assure sustainability after USAID funding ends, it is necessary to capitalize on this situation and focus on a set of activities that meet the following criteria:

activities required to consolidate progress to date under the project for which there is, or will be, supportive administrative capacity;

activities for which AID's support is needed to assure success and for which no other external funding is foreseen;

activities that can reasonably be projected to be sustainable from their own income streams within two years;

activities for which DOMS or the IOB have a clear comparative advantage in the provision of managerial talent, or are expected to develop such within a reasonable period of time;

activities that are responsive to expressed entrepreneurial needs.

USAID recognizes that the IOB and the University will be engaged in a variety of management education activities that will be financed by sources outside the project. The USAID financing strategy is one that will focus on a limited set of activities, on sustainability and on an incremental increase in the financing of core activities from non-AID sources. Programmatic components are:

- (1) Program Enhancement of the IOB - Building on successes to date, AID financing will focus on activities that are consistent with the new level of autonomy and the affiliation to the University that became effective in September 1993. This will include professional graduate programs in management, sponsored research and the executive development program.
- (2) Upgrading of the Undergraduate Management Programs in the Department of Management Studies (DOMS) - AID financing will contribute to the Faculty of Social Sciences' objective of broadening the base of the undergraduate programs by initiatives such as drawing on faculty from other departments, which will produce better rounded graduates, while realizing cost savings and efficiencies for the University.
- (3) Development of an Endowment Program - Only limited financing will be needed to develop the strategy, operational procedures and marketing tools needed to install an endowment program that will be critical to the broader strategy for sustainability of the management programs.
- (4) Design of Facilities - New facilities are essential to the program enhancement that will take place over the next two years. AID financing will cover only the design costs which is the critical first step in attracting private sector financing for the construction of facilities that will adequately serve the management development program needs of the IOB well into the 21st century.
- (5) Divestiture of Programs - The University's plan to divest itself of a series of lower level certificate and diploma programs to local management training institutions is critical to maintaining a quality focus. AID will finance start up costs for the establishment of an accreditation service for the local training institutions that will take on the task of providing these programs.

**B. PROGRAM ENHANCEMENT OF THE IOB**

1) The EMBA - The two-year Executive MBA is the flagship of the project's efforts to date. As a part-time program, it's clientele are managers with at least five years experience who have potential for advancement to the most senior ranks of management. This pool of managers is large, and those selected to be students are enthusiastic about the program.

The alumni are eager to find ways to maintain their association with the program and UWI, and the business community remains a strong support group for this program. With steady annual increases in tuition, the size and quality of the applicant pool has not declined.

This EMBA is the clear program of choice, when placed against other EMBA offerings on the island. The Project will support an increase in the annual intake to about 45 new students each year. It will also support a series of program enhancement measures to strengthen the quality and relevance of the education to a rapidly changing market place. These measures will result in:

**Enhanced Qualitative skills** - Increased offerings on the qualitative side of management will include such areas as entrepreneurship, ethics and business leadership.

**Globalized Curriculum** - The issues of globalism need to be related to all subject areas of the curriculum. Since the economic health of Jamaica, like that of all other countries, in the 21st century will depend on its ability to link into forces driving the global economy, this area can no longer be treated as a discrete specialized course.

**Improved Quality and Productivity** - Norms of Total Quality Management and Productivity are globally determined today and are among the forces driving the global competition and, should cut across and be related to all areas of the curriculum.

**Relevant Teaching Material** - Initiatives under the project to date to develop cases and other materials based on the Jamaican and Caribbean context will be further strengthened.

**International Experience** - The program should add an optional international activity to the curriculum. This experience should focus on Jamaica's potential in the regional and international market place for development of diversified exports. The country selected for field experience should have current or potential economic importance to Jamaica.

**Program Linkages** - Formal linkages with other graduate level programs in the faculty will be negotiated in order to maximize use of faculty resources, provide for a broader range of quality electives and make more efficient use of physical facilities.

2) Design of a full-time MBA - The project will also support design of a full-time MBA to be added to the portfolio of the IOB. Some core courses will be the same as those offered in the EMBA. However, with a focus on younger managers who have less experience, there will be significant curriculum differences. The themes of globalism, productivity and quality will also pervade this program. It will be structured to be open to graduates with non-management first degrees. This full-time MBA will require two years experience as one of the entry criteria, and will seek to develop more functional competence. Students in this program will be allowed to pursue elective options that will lead them to concentrate in a specialized field such as International Business, Organizational and Human Resource Management, Technology and Manufacturing Management, Marketing and Banking and Finance.

Students will also be required to carry out a substantial research project or a practical internship, thereby building up the graduate research and case experience of the Institute. Development of this program will respond to the considerable pressure that is being placed on the IOB to meet the needs of younger managers with two years management experience (the current EMBA concentrates on senior managers with substantial management experience, whose average age is 35). The lead time for program development and academic review/approval is approximately 18 months. The first class of 25 students will be enrolled during the summer of 1995, in order to begin the program at the beginning of the 1995-96 academic year.

3) Sponsored Research - IOB experience to date indicates that one area in which the Institute has comparative advantage, in relation to commercial management services firms, is sponsored research. It is expected that the IOB will engage in research projects that are heavily weighted toward resolving strategic management issues of firms, either private or public. The Institute is expected to begin these action research interventions by leading from their strengths and expanding as their capabilities emerge to solve a broader range of problems. These research projects will help faculty member see professional growth and rewards associated with their efforts. These projects should also link the IOB, the DOMS and other departments of the Faculty of Social Sciences to maximize talent available and to enhance the association with the business community. The objective of strengthening sponsored research for management supports the research role of the University. Moreover, income generation from these activities will contribute significantly to the broader strategy of sustainability. The research will also involve full-time graduate students, thereby enhancing the link with faculty members and contributing to the creation of an environment in which research is actively encouraged.

4) Executive Development Programs - The Project to date has seen a modicum of success in the design and delivery of short-term executive development programs. However, to date the level of effort still falls short of that needed to produce the income stream necessary to contribute significantly to the financial sustainability of the IOB. The need for the IOB to develop clear, strong marketing strategies and tools for the executive development programs is evident. More professional and targeted marketing is an objective of the program enhancement effort. As a first step, the IOB will prepare a marketing strategy for joint review not later than May 1, 1994. While directed primarily at the Executive Development Program, the strategy should be one that recognizes the marketing requirements of other Institute programs as well. Because there is far more competition in the executive development arena than in that of the degree programs, the IOB must be emphatically clear about its target audiences. Technical assistance that may be required will be made available to facilitate formulation of the strategy.

The target group for these programs consists of top-level executives, up-and-coming middle managers in the private and public sectors, and high-performing owner-manager entrepreneurs. A portfolio of one to four week programs that address this market will include, inter alia:

**The Executive Management Development Program (EMDP)**, a one-month partially residential program, has been conducted twice and has proven itself a success in meeting the needs of the clientele at which it is aimed. Its curriculum is well designed, the faculty are excellent and the methodology is interactive and action oriented. Evaluations indicate that the market will support two sessions a year, and this is an area to be explored during the period of the Supplement. Also, agreement has been reached for the IOB to take over the Caribbean Management Series from Alcan/Jamaica.

A new **International Executive Management Development Program**, focused on export strategies, has yet to get off the ground because of the eruption on two occasions of political unrest in the country where a portion of the program was to be conducted. The program has also experienced some marketing and design difficulties. Project technical assistance will focus on rectifying these problems and, in the process use the successful design and marketing process of the EMDP.

USAID support for IOB program enhancement is budgeted at US\$290,000 for FY94 and \$175,000 for FY95, for a total of US\$480,000. These funds will finance resident technical assistance, U. S. short-term lecturers, improved program marketing and small research grants for case material, all aimed at improving the quality of program offerings.

C. UPGRADING OF THE UNDERGRADUATE MANAGEMENT PROGRAMS IN THE DEPARTMENT OF MANAGEMENT STUDIES (DOMS) AND THE FACULTY OF SOCIAL SCIENCES:

The major objectives to be achieved in the undergraduate programs during the final two years of the Project covered by this Supplement include:

broadening of the undergraduate degrees from technical and functionally driven courses to provide for more intellectual depth, involving a range of offerings from the social science and language departments; and

updating of management course offerings consistent with international standards for management studies and rapidly changing skill requirements in the regional and global arena.

These objectives will build on progress to date that has seen the student body of the undergraduate programs double and the Management Studies become the largest single program area in the University during the life of the Project. The first objective will be achieved through curriculum revision and the use of a number of other faculty members to teach core disciplines for the undergraduate degrees. Joint appointments between departments of key individuals responsible for the new offerings will be critical to achieving this objective. The University is committed to such appointments and will proceed to formalize them as the structure and need becomes clearer from the curriculum review process. The Project will provide assistance to carry out the curriculum review and complete the restructuring process.

The objective dealing with upgrading management course offerings will be accomplished through the work of a Faculty Review team which will be supported by the project. The review will focus on relevance, quality and currency of the curriculum and is expected to be repeated at approximately three-year intervals.

USAID direct funding for upgrading the undergraduate management program (at BSc level) is estimated at US\$45,000 for FY94, \$5,000 for FY95, and \$5,000 for FY96, making a total of US\$55,000. These funds will pay for local and overseas personnel to conduct a Faculty Review of all undergraduate programs within the Faculty of Social Sciences and thereafter to support a curriculum revision program.

D. DEVELOPMENT OF AN ENDOWMENT PROGRAM

The long-term strategy for financial sustainability of any educational institution that is not largely dependent on subsidies for its operation must include the development and management of an endowment program. There is no known university today that can sustain its programs with tuition fees and program charges associated with executive education alone. The 1993 Project Evaluation noted that the long-term financial viability of the programs developed under the Project to date "depends as much on the ability to plan for permanence as on revenue generating capacity." The evaluation further concluded that "permanent endowment funds are the best assurance of permanence."

While the business community of Jamaica has made an impressive contribution to management education and is to be applauded for its enlightened self-interest in doing so, no PERMANENT endowment has been initiated. There is potential for a substantial inflow of funds. The feasibility of a funding flow adequate to finance an endowment program is supported by recent investments that resulted in the full financing of one senior chair in the DOMS, and one in the Economics Department, as well as the success to date of the broader University fund-raising drive aimed at raising \$5 million for university-wide capital development. A key goal of the dynamic EMBA Alumni Association is the financial support of continuing management education. The Alumni Association is a potentially powerful group with manager-members in over 100 major firms across the island. The influence of these people, individually and institutionally, will continue to grow as long as the program quality is maintained and their self-interest is served.

The endowment strategy must be one that reaches out for sustained contributions over time, as well as one that draws on the dividends and interest from the PERMANENT capital to meet requirements of activities being financed, in whole or in part, by endowment resources. While the University has been quite successful in fund-raising efforts, it is less experienced in the management of a capital fund, in which the principle is maintained as an asset, and from which earnings are drawn for agreed upon purposes to sustain and strengthen a permanent program.

The Project will finance assistance in the structuring and management of a permanent endowment fund to support future needs related to maintaining quality management education at UWI. The endowment fund will provide resources for the IOB that will be focused primarily on program and institutional strengthening to assure the Institutes' permanence and capacity for regular updating. The IOB Board will be responsible for the on-going fund-raising activities that will

be critical to replenishment and building of the endowment fund. The recently approved Articles of Affiliation between the IOB and the University gives the Institute specific authority to independently carry out this function. Design and approval of an endowment structure should be completed not later than December 1994 and the initial endowment funds should be in place, earning income before the PACD.

While the detailed scope for project assistance in the establishment and management of an endowment fund will have to evolve during implementation, strategic planning must include the following basic principles:

- Recent advances related to the creation and management of endowment resources must be tapped to UWI's benefit.
- The involvement of the IOB Board in the design of the endowment strategy is paramount.
- The technical assistance brought to the task must be made up of individuals with deep, substantive experience in the creation and management of endowment trusts for higher educational institutions.

USAID direct funding for the Endowment program is estimated at US\$25,000 for FY94; \$15,000 for FY95 and \$10,000 for FY96, making a total of US\$50,000. These funds will pay for a technical expert to work with and advise the UWI on strategies for the establishment of an endowment fund driven by private sector interests.

E. Design of new Facilities for the IOB

The Project will finance the design costs of a new home for the IOB, the construction of which will be financed primarily from private sector sources. The design will be one that maximizes conditions for interactive, client oriented management education and research. The facilities will service the needs of multiple degree programs and short-term executive development programs with seminar rooms, meeting rooms, offices and support for research and consultation activities. The target date for completion of design is June 1, 1994, to be followed by contracting and the financing package by early 1995. While it is not expected that these facilities will be operational until late 1995 or early 1996, the university has made a commitment to make available adequate, interim facilities to allow the incremental expansion of programs supported by the project during its final two years. That commitment will form part of the project agreement amendment which obligates new funds under the project.

USAID funding of \$125,000 for design work will enable the UWI to present concrete plans to the business community for financing of needed new facilities.

F. Divestiture of Certificate Programs for lower level Management

Currently, the DOMS and Faculty of Social Sciences are involved in two-year certificate programs for aspiring managers at and below the middle ranks. The demand for these programs far exceeds any capacity that the UWI ever expects to devote to this type program. Furthermore, the programs focus on basic supervisory skills and managerial practice, which, while critical to managerial development, do not deal directly with the University's central mandate nor take advantage of its areas of comparative advantage. Yet, it is estimated that 25 percent of professional faculty time goes into the design, conduct and management of these programs. The University has set an objective of divesting itself of these programs. Divestiture will consolidate limited university staff resources and facilities to focus on programs at the heart of its mandate, most of which have been developed under this project.

The objective dealing with divestiture of supervisory, lower level programs by the Faculty will be achieved in collaboration with the IOB. The project will provide a limited amount of short-term technical assistance to help develop a cost-effective quality control service for local training institutions that will absorb the market for these courses as a result of the divestiture by the University. This service will be established so as to make the University's involvement self-financing.

USAID funding of \$72,000 will finance a project officer and establishment of a certification and standards program.

G. Other Activities

To achieve the above programmatic objectives, continued support of the professional and administrative underpinnings is critical to the long term vitality of the IOB and University management programs.

**Staff Development** - Five faculty members financed by the project are expected to complete Ph.D programs in critical scarcity areas in 1995/96. Their dissertations will deal with issues related to the future development of Jamaica's private and public enterprises. Each of these faculty members will return to joint appointments with dedicated time in both the Institute of Business and the Department of Management Studies. During the period of this supplement four Masters candidates currently in training in the U.S. will return to faculty positions. During this same period, at least three faculty members will become Ph.D. candidates in a new UWI doctoral degree program being

Ph.D. candidates in a new UWI doctoral degree program being developed in collaboration with the University of Florida. The project will support the requirement of this degree program for one year of course work at the University of Florida. The Project also will support short-term training for faculty members focused on curriculum revision requirements, particularly at the undergraduate level.

USAID funding levels will be \$85,000 in FY94 and \$65,000 in FY95, for a total of \$150,000.

**Commodities** - The Project will provide funds to upgrade the existing computer network and to strengthen the IOB's internal computer capability. Procurement will also include a badly needed updating of teaching equipment such as computer-linked overhead projectors. A modest increment of additional library materials will be included. USAID funding levels will be \$95,000 for FY94 and \$35,000 for FY95, for a total of \$130,000.

**Administrative Support** - The University has begun to assume responsibility for administrative staff costs. This will be accelerated during the period of the supplement, leading to a shift of all essential core costs from donor financing to the University and the IOB by the completion of the Project. Those positions which will continue to receive project support, though in a declining amount, include the Director of the IOB, a fellow to direct research activities, and an accountant/administrative officer. USAID funding levels will be \$90,000 for FY94 and \$45,000 for FY95, for a total of \$135,000.

**Professional Program Development** - The University will recruit an experienced management education expert to serve as coordinator of professional graduate programs. A major assignment for this individual will be the design of the full-time MBA. The first year of this appointment will be supported by the project, with financing thereafter to come from program income. It is also anticipated that up to six person months of additional effort will be required to complete the review, design and marketing of other programs supported by the project. The Project will also support continuing requirements for external faculty from the U.S. This requirement has incrementally decreased from approximately 80% of the total teaching load at the time this Project was initiated to about 20% to date. With an increasing global focus it is not expected that the program requirement for off-shore faculty will fall much below the current 20%, a requirement that the University and the IOB will meet from their own revenue sources after the Project is concluded.

**Research Support** - As the University and IOB test and develop their capacity to do sponsored research, the Project will provide financing for up to ten seed grants. Criteria for selection of grantees will include factors that encourage faculty members to undertake research leading to relevant case material and/or journal publications. This grant program will be coordinated by the Research Fellow supported by the Project. USAID funding of \$50,000 for the ten grants is provided under the project's Program Enhancement element.

#### **H. Programatic and Financial Sustainability Implications**

Over recent months, the University and the IOB have made significant progress on actions that are leading to sustainability of quality management education under conditions of limited external subsidy. In a June 3, 1993 letter, the Pro-Vice Chancellor of the University enunciated a number of commitments on the University's part and established target dates for their implementation. In all cases these commitments are on schedule or have been achieved ahead of schedule. Key among these are the following:

In September the IOB was established as a legally separate entity with authority to develop programs, raise and expend funds and interact directly with the private sector. A few weeks later the Articles of Affiliation which link the IOB to the University were formally endorsed by the University Academic and Finance and General Purpose committees.

Likewise, the principle of joint appointments, whereby selected faculty will formally be assigned IOB responsibilities for a portion of their time, has been approved, with a target of up to nine such appointments over the next three years. In the Project Agreement Amendment following authorization of this PP Supplement, the University will covenant that individuals will fill the initial three joint appointment positions not later than September 1, 1994.

The University has recognized that, while the IOB will be an income earner, it will not be able to cover overhead costs for space and general administration. Consequently, the University has committed itself to treat the IOB in the same manner as other departments, i.e. such costs will be recovered only in-so-far as IOB expansion may impose additional, identifiable operational costs on the University.

The University has maintained the schedule which it established over two years ago to impose tuition fees at an incrementally higher level over a multi-year period. The

tuition levels are tied directly to economic costs. For the school year beginning in September 1994, the annual tuition rate for the EMBA will be increased to US\$5,000 from its current level of approximately \$4,000, which will represent a 100 % increase since 1991. The University has also introduced a partial cost recovery regime on the undergraduate program, starting in September 1993.

Financial projections reflect a steady growth of the IOB program. Program generated income is expected to cover approximately 85% of all administrative expenditures, including the salaries of all core staff. While there is a sharp rise in projected program income, this rise is supported by major new programs coming on stream over the projection period. In FY 1994 program income is expected to exceed program expenditures for the first time. By 1996, the surplus of program income over expenditures is expected to be in the range of J\$9-10 million per annum. When administrative expenditures, which must be covered, are added to program expenditures, there will be an anticipated deficit of approximately 12 percent. This deficit establishes the minimum target for income from endowment and other private sector sources. In absolute terms this means about US\$200,000 per year. This expectation is realistic based both on the limited fund-raising to date and the levels of endowment required to support business schools in North America and other places. Most U.S. business schools depend on private sector and endowment support for not less than 25 percent of total costs. With not more than 15 percent of its needs dependent upon external support, the IOB should be on sound financial footings if the program income reflected in Annex I is realized. The University recognizes that endowment income will not come on stream until 1995 and that an adequate capital base may not be in place until 1996. During this period the University is committed to finance administrative costs not covered by program income.

The first meeting of IOB Board of Directors following its incorporation as a separate legal entity took place on September 29, 1993. The Board is made up of private sector entrepreneurs and members of the University leadership. The Board's early decisions reflect intent to treat the IOB as an enterprise that requires income streams sufficient, not only for operation, but for growth as well. The Board has recognized the importance of a capital endowment to a strategy that will lead to permanence of the Institute and has called upon the IOB to expand Executive Development Program offerings, in order to both meet demand and increase the income stream from such activity. By 1996, these programs should contribute at least 12 percent of total program income.

The strengthening of sponsored research, to be supported by the project, will bring dual benefits, consistent with the financial sustainability requirements of the IOB. By undertaking research that is in response to enterprise needs, the first benefit to the IOB will be an income stream that will cover costs encumbered. The second benefit will accrue directly to the programs of the IOB in the form of rich case material to enhance the educational process.

While the funding of architectural design for facilities required to support programs described herein will be covered in the authorization of the Supplement, program expansion is expected to precede completion of construction of such facilities. The University agrees to provide adequate space on the campus for such expansion, pending completion of construction that will be largely private sector financed.

I. SUMMARY: EXPECTED OUTPUTS FOR THE SUPPLEMENT

The following are expected outputs from the remaining two years of the Project:

1. Academic Staff Development:
  - a. 4 faculty with Masters in Management return to teach in the B.Sc. program.
  - b. 5 faculty return in 1995 and 1996 with Ph.Ds to take up joint appointments in the IOB and the DOMS.
  - c. 3 faculty complete the one-year U.S. portion of a joint doctoral program that will lead to a Ph.D granted by the University of the West Indies.
  - d. 10 professional development projects, financed by the project and resulting in case material, completed by faculty of the IOB and Social Science departments.
2. New Organizational/Financial Structures:
  - a. IOB corporate structure fully operational under a Board that provides strategic direction and financial oversight.
  - b. Income streams from graduate programs, sponsored research, executive development and the endowment cover all IOB operational costs.
  - c. Marketing plans exist for each component of the project.
  - d. An endowment structure designed and fully operational, from which proceeds are available for capital development and special projects under the direction of the IOB Board.
  - e. 5 faculty members have joint appointments between the IOB and DOMS or other departments of the faculty (with an additional four planned for 1996).

3. Program Development:
  - a. 45 students enrolled annually in the EMBA program.
  - b. 30 students enrolled in the fulltime MBA program.
  - c. Curriculum reforms made in the EMBA program in the areas of globalism, TQM and Caribbean relevance.
  - d. Core curriculum of jointly-required courses designed for the graduate programs.
  - e. Undergraduate program redesigned to reflect a broader academic foundation to the program.
  - f. 2 EMDP seminars held with 50 certificates awarded (25 enrolled in each of the last 2 programs).
  - g. Alcan Caribbean Management Series conducted by IOB.
  - h. Executive development seminars (in number and subject matter) reflect a response to private sector demand.
4. Sponsored Research:
  - a. 5 projects completed and 5 under contract in the area of sponsored development research.
  - b. 5 teaching cases published.
5. Computer facilities upgraded -- both software and hardware Procured and installed.
6. Library materials -- materials procured that directly contribute program development under the project.
7. Architectural Design: A&E design for building complete.

#### VI. REVISED COST ESTIMATES AND FINANCIAL PLAN

##### Revised Cost Estimates and Financial Plan

The revised USAID cost estimate of the Project, with the addition of US\$1,200,000 in grant funds, is US\$5,638,000. The Project funding will end December 31, 1995. The major items comprising the Cost Estimates for the Supplement in terms of functional components are summarized in Table I. Table II reflects the same estimates, broken down by budget elements. The budget includes \$200,000 of previously authorized but unobligated funds, bringing the total of new funds available for the Supplement period to \$1,400,000.

**TABLE I**  
**FUNCTIONAL COMPONENT BUDGET FOR PHASE II SUPPLEMENT - FY 94 - 96**

ELEMENTS	FY 94		FY 95		FY 96*		TOTAL	
	USAID	UWI	USAID	UWI	USAID	UWI	USAID	UWI
I. <u>Prog. Enhancement of the IOB</u>	<u>290</u>	<u>75</u>	<u>175</u>	<u>75</u>	<u>15</u>	<u>80</u>	<u>480</u>	<u>230</u>
• Director - Masters Programs	60	15	60	15		35	120	65
• Resident Management Fellow	60	15	0	0			60	15
• EMBA	75	10	50	10		15	125	35
• MBA Design & Promotion	40	25	10	25	10	25	60	75
• Research Grants	20	0	30	0			50	0
• Executive Development	35	10	25	25	5	5	65	40
II. <u>Upgrading of Undergrad. Mgnt Program</u>	<u>45</u>	<u>45</u>	<u>5</u>	<u>5</u>	<u>5</u>	<u>5</u>	<u>55</u>	<u>55</u>
• Faculty Review	20	20	0	0	0	0	20	20
• Curriculum Revision	25	25	5	5	5	5	35	35
III. <u>Endowment Program</u>	<u>25</u>	<u>10</u>	<u>15</u>	<u>0</u>	<u>10</u>	<u>0</u>	<u>50</u>	<u>10</u>
• Design	25	10	0	0	0	0	25	0
• Assessment	0	0	15	0	10	0	25	10
IV. <u>Design of Facilities</u>	<u>125</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>125</u>	<u>0</u>
V. <u>Divestiture/Certification Program</u>	<u>43</u>	<u>30</u>	<u>24</u>	<u>40</u>	<u>5</u>	<u>22</u>	<u>72</u>	<u>92</u>
• Project Officer	28	15	14	30	-	12	42	57
• Program Activities	15	15	10	10	5	10	30	35
VI. <u>Staff Development</u>	<u>85</u>	<u>40</u>	<u>65</u>	<u>35</u>	<u>0</u>	<u>10</u>	<u>150</u>	<u>85</u>
• Joint Ph.D program (3)	45	30	45	30	0	10	90	70
• Short Term staff	40	10	20	5	0		60	15
VII. <u>Commodities</u>	<u>95</u>	<u>5</u>	<u>35</u>	<u>10</u>	<u>0</u>	<u>5</u>	<u>130</u>	<u>20</u>
• Computer Upgrading	60	5	25	0			85	5
• Library Materials	20	0	10	0		5	30	0
• Teaching Equipment	15	0	0	10			15	10
VIII <u>Administrative Support</u>	<u>90</u>	<u>32</u>	<u>45</u>	<u>77</u>	<u>0</u>	<u>35</u>	<u>135</u>	<u>144</u>
• Director IOB	42		21	21		12	63	33
• Research Fellow	28		14	14		8	42	22
• Accountant/Admin. Officer	20		10	10		6	30	16
• Allowances	0	32	0	32		9		73
IX. <u>USAID Program Support (50% cost of U.S. PSC)</u>	<u>30</u>		<u>75</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>105</u>	<u>0</u>
X. <u>Assessment</u>	<u>30</u>		<u>25</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>55</u>	<u>0</u>
• Audit	20		0				20	
• Evaluation	0		25				25	
• Impact Study of the EMBA	10		0				10	
XI. <u>Contingency</u>	<u>0</u>		<u>33</u>		<u>10</u>		<u>43</u>	<u>0</u>
<b>TOTALS</b>	<b><u>858</u></b>	<b><u>237</u></b>	<b><u>497</u></b>	<b><u>242</u></b>	<b><u>45</u></b>	<b><u>157</u></b>	<b><u>1,400</u></b>	<b><u>636</u></b>

NB: \*First quarter FY96

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**TABLE II**  
**BUDGET ELEMENTS FOR PHASE II SUPPLEMENT - FY 94 - 96**

	<u>FY 94</u>		<u>FY 95</u>		<u>FY 96*</u>		<u>TOTAL</u>	
	<u>USAID</u>	<u>UWI</u>	<u>USAID</u>	<u>UWI</u>	<u>USAID</u>	<u>UWI</u>	<u>USAID</u>	<u>UWI</u>
El.1 <u>Technical Assistance</u>	<u>235</u>	<u>65</u>	<u>120</u>	<u>50</u>	<u>10</u>	<u>75</u>	<u>365</u>	<u>190</u>
• Director - Masters Prog.	60	15	60	15	0	35	120	65
• Resident Management Fellow	60	15	0	0		0	60	15
• EMBA	75	10	50	10		15	125	35
• MBA Design & Promotion	40	25	10	25	10	25	60	75
El.2 <u>Administrative Support</u>	<u>118</u>	<u>47</u>	<u>59</u>	<u>107</u>	<u>0</u>	<u>47</u>	<u>177</u>	<u>201</u>
• Director IOB	42		21	21		12	63	33
• Research Fellow	28		14	14		8	42	22
• Accountant/Admin. Officer	20		10	10		6	30	16
• Allowances	0	32	0	32		9		73
• Project Officer Cert. Prog.	28	15	14	30		12	42	57
El.3 <u>Computer Hardware &amp; Software</u>	<u>60</u>	<u>5</u>	<u>25</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>85</u>	<u>5</u>
El.4 <u>Staff Development</u>	<u>105</u>	<u>40</u>	<u>95</u>	<u>35</u>	<u>0</u>	<u>10</u>	<u>200</u>	<u>85</u>
• Joint Ph.D	45	30	45	30	0	10	90	60
• Short Term Staff	40	10	20	5	0	0	60	15
• Research Grants	20	0	30	0			50	0
El.5 <u>Program Development</u>	<u>85</u>	<u>70</u>	<u>30</u>	<u>15</u>	<u>20</u>	<u>15</u>	<u>135</u>	<u>100</u>
• Upgrading Undergraduate Prog.	45	45	5	5	5	5	55	55
• Endowment Program	25	10	15	0	10	0	50	10
• Divestiture/Certificate	15	15	10	10	5	10	30	35
El.6 <u>Commodities</u>	<u>35</u>	<u>0</u>	<u>10</u>	<u>10</u>	<u>0</u>	<u>5</u>	<u>45</u>	<u>15</u>
• Library Materials	20	0	10	0	0	5	30	5
• Teaching Equipment	15	0	0	10	0	0	15	10
El.7 <u>Construction</u>								
• A & E Design	<u>125</u>	0	0	0			<u>125</u>	<u>0</u>
El.8 <u>Contingency</u>	0	0	<u>33</u>	0	<u>10</u>	0	<u>43</u>	<u>0</u>
El.9 <u>Executive Development</u>	<u>35</u>	<u>10</u>	<u>25</u>	<u>25</u>	<u>5</u>	0	<u>65</u>	<u>35</u>
El.10 <u>Evaluation/Audit/Assessment</u>	<u>30</u>	<u>0</u>	<u>25</u>	<u>0</u>	<u>0</u>	<u>5</u>	<u>55</u>	<u>5</u>
• Audit	20	0	0	0			20	0
• Evaluation	0	0	25	0			25	0
• Impact Study	10	0	0	0			10	0
El.11 <u>USAID Program Support</u> (50% cost of U.S. PSC)	<u>30</u>	<u>0</u>	<u>75</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>105</u>	<u>0</u>
<b>TOTALS</b>	<b><u>858</u></b>	<b><u>237</u></b>	<b><u>497</u></b>	<b><u>242</u></b>	<b><u>45</u></b>	<b><u>157</u></b>	<b><u>1,400</u></b>	<b><u>636</u></b>

NB: \*First quarter FY96

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## VII. PROJECT IMPLEMENTATION

### A. IMPLEMENTATION ARRANGEMENTS AND PLAN

#### (1) Organization of the IOB

Annex IV contains the organizational chart of the IOB.

##### a. **A Company**

The IOB has been established as a company limited by guarantee with a separate legal identity from the University but linked to the University through an instrument of affiliation. The Articles and Memorandum of Association that came into effect in September 1993 gave the IOB full administrative and commercial autonomy. University regulations apply to the IOB in relation to the appointment of academic staff and the teaching of programs which require the University's certification. Administratively, the IOB has full departmental status, with a full-time director, as well as professional and administrative staff. The Institute may set fees, hire staff, and operate a special bank account. It has an independent accounting system, the framework of which is that of the University. The private sector is strongly represented on the IOB's Board of Directors.

**The mandate of the IOB as set out in the Articles of Affiliation with the University is as follows:**

- (i) Carry out teaching, research and consulting responsibilities.
- (ii) Focus on graduate professional management education and short term executive development programs for both the private and public sector, including small and traditional businesses.
- (iii) Conduct research related to business and management, and collaborate where appropriate with the University's Institute of Social and Economic Research (ISER) which is the principal University agency for social sciences research.
- (iv) Provide management consultancy at a commercial fee to the business and public sectors.
- (v) Act as the outreach arm of the University to bring the business sector and University closer together for the mutual benefit of both parties.

##### b. **Role and Functions**

The IOB is responsible for professional graduate management degrees awarded by the UWI, which, in addition to the EMBA, will include the new MBA and MPSM. The IOB is also responsible for: the executive development programs; contract research; outreach, including the external certification services; and focused consultancy services,

including those to the small business sector. In addition to its core of professional staff, other staff resources will be made available through joint appointments, and special arrangements with adjunct faculty, associates and affiliates. The IOB has full control of all its programs and the Director has the status of Department Head within the Faculty of Social Sciences.

**c. Financial Management Capability**

Until recently all accounting for the IOB was handled by central university accounts. In mid-1993 a new computerized system was designed and installed to handle IOB Company commercial accounts. By the end of UWI's 1993/94 financial year, this system will conform to commercial requirements. At the same time, the IOB financial statement will be included for purposes of reporting UWI's overall financial status.

**d. Relationships**

In practice, the IOB is a subsidiary of the University, which remains the sole grantee or USAID recipient. As a legally separate institution, the IOB is not operationally a part of the Faculty of Social Sciences. Academically, however, it has department status and its academic programs are reviewed by the Faculty's Graduate Academic Committee and regulated by the University's Academic Council.

The IOB Board works in consultation with a Project Management Team (PMT). This Team is chaired by the Principal of the Mona campus, who monitors the UWI/USAID Management Education Project, resolves issues relating to implementation of the Project, and supervises the Project Manager in the execution of project activities. The Principal is Chairman of both the Board and PMT, and as such, has both an operational and policy role.

**e. The Board of Directors**

Prof. Gerald Lalor      Principal and Chairman

Members of the Business Sector

Mr. Oliver Clarke	Chairman, the Gleaner Corporation
Mr. Elon Beckford	Banker
Mrs. I. V. Brown	President, JAMPRO
Dr. Marshall Hall	Chairman, Banana Producers
Mr. Henry Salmon	Vice President, Personnel/ Industrial Relations, Alcan
Dr. Huntley Manhertz	MD, Data Resources Systems
Mr. Earle Richards	Chairman, Jamaica Public Service
Dr. Carlton Davis	Permanent Secretary, Office of the Prime Minister
Ms. Rosemarie Watts	Student member

UWI Members

Prof. Rex Nettleford	Pro-Vice Chancellor/Director, School of Continuing Studies
Dr. Don Robotham	Dean, Faculty of Social Sciences
Prof. Edwin Jones	Prof. of Administration, Department of Government
Prof. Gordon Shirley	Head, Dept. of Management Studies
Mr. Leo Wilson	University Bursar
Mr. Cezley Sampson	Director, IOB

**f. Staffing and Organization of the IOB**

In addition to its core staff, the University is in the process of making a series of joint appointments to increase the breadth of teaching staff with committed time to the IOB. Nine such appointments are planned in order to provide the IOB with a full range of specialists; the University will covenant to complete the first three appointments of senior faculty members by June, 1994.

Core Staff

1. Director of IOB (Mr. Cezley Sampson)
2. A senior Fellow - Research and Executive Development (Dr. Andrea Blackwood-Harriott)
3. A senior Professional Fellow - responsible for EMBA, MBA, and MPSM degree programs. (position to be filled)
4. A Consulting Fellow - for commercial consulting services - Mrs. Carleen Gardner
5. An Accounting and Administrative Officer

(2). The Department of Management Studies: Its Role and Functions

The Department of Management Studies (DOMS) and the Faculty of Social Sciences are challenged with the fastest growing program in the University. Significant strides have been made to meet this challenge through semesterization and curriculum upgrading. Additional resources authorized by this Supplement will be used to further modernize the undergraduate business programs so that they may play their continuing role in providing human capital to meet rapidly changing work force demands. Specifically, the Project will support a Faculty Review and subsequent curriculum revision that will be focused, inter alia, on assuring that: (1) undergraduate programs provide a broader, more rounded education, while allowing greater specialization in the final year; and (2) that academic graduate programs meet the highest standards of scholarship.

**(3) Implementation Issues/Concerns**

Key concerns for continuing with this amended project will be UWI's commitment and action on the following critical issues:

- a. Joint appointments of selected teaching staff between departments of the Faculty of Social Sciences and the IOB for mutual enrichment and balanced commitment;
- b. Appointment of not less than three senior faculty members to provide the depth required for advanced courses and balance the teaching load in the DOMS;
- c. Mobilization of business sector financial support towards the construction of the proposed buildings to serve the IOB and the Faculty.

These concerns will be covered in Conditions Precedent and Covenants in the Grant Agreement.

**(4) Revised Implementation Plan**

The University of the West Indies is the principal recipient of the grant; the IOB and the DOMS are secondary recipients under the Grant. The Project Manager/IOB Director has day-to-day responsibility for implementing project activities.

The Implementation Plan for the Supplement is based on the objective of achieving sustainability, both qualitative and financial of management programs at the university by the PACD of December 1995. To this end, core activities and the budgets which support them reflect an incremental decrease in AID support with concurrent increases by the grantee. A detailed schedule of activities to be implemented during the final two years of the project is attached as Appendix II.

**(5) Training Plan**

Staff development will be continued as a priority activity that is cross-cutting in its support of all key projects elements. As originally planned, the five Ph.D candidates and four Masters candidates currently in training in the United States will continue to receive project support. The Masters candidates will complete their programs and return to appointments in the DOMS in 1994 and 1995. All Ph.D candidates are on schedule to complete course work and comprehensive exams in early and mid 1995. Three, and possibly all five of this group, will require some university support to complete dissertations over the six month period following the PACD. The University will provide financial support to assure that there is no delay in completion of this degree requirement in 1996, after conclusion of project financing.

New training during the period of the supplement will include both long-term and short-term programs, financed jointly by AID and the university at a total cost of \$225,000 of which the AID share is \$150,000. In regard to long term training, the project will support three faculty members who will participate in a new joint Ph.D program between UWI and the University of Florida. The project will finance the one year of course work at the University of Florida, Gainesville that is a requirement of this new program. In regard to short term training, the project will finance consultation/ observation visits of up to three teams of university faculty members to American campuses as part of the curriculum review/revision process which is a key activity supported by this supplement. This will be augmented by three to four visits by core and adjunct IOB professional staff to garner experience in the globalization of curriculum. All training in the U.S. and in third countries will be conducted in a manner that is in full compliance with AID's HB. 10.

(6) Procurement Plan

Equipment detailed in the input section of the revised project log frame will build on configurations already financed by the project and result in an updating that will support programs into the late 1990s. The \$85,000 earmarked for computer system updating will finance a LAN (local area network) for research and teaching purposes at the IOB and computer stations to support the expanding professional staff. Likewise, the financing of additional teaching equipment will modernize existing packages by the addition of items such as recent model overhead projectors that have computer input capability. While the project will continue to finance some major offshore professional journals and a few new acquisitions in the field of management, the University is committed to taking on an increasing share of this cost as is demonstrated by the budget. A procurement plan will be submitted for AID approval not later than April 1, 1994.

(7) Methods of Implementation and Financing

Table III shows the method of implementation and financing planned for this supplement. The methods of implementation under the project to date will generally continue for the Amendment. The UWI/IOB will contract for all goods and services provided by the grant except for participant training (overseas long term training), evaluations and audits, which will be initiated by USAID. Specific instructions on AID contracting will be provided to the UWI, and approval for expenditures will continue to be provided by Project Implementation Letters (PIL).

TABLE III  
METHODS OF IMPLEMENTATION AND FINANCING

ELEMENTS	IMPLEMENTATION	FINANCING	APPROXIMATE AMOUNT (US\$000)
1. TECHNICAL ASSISTANCE	HCC	Adv/Reimb.	365,000
2. ADMINISTRATIVE SUPPORT	"	"	177,000
3. COMPUTER HARDWARE/SOFTWARE	"	"	85,000
4. STAFF DEVELOPMENT	AID Direct	Direct Paymt.	200,000
5. PROGRAM DEVELOPMENT	HCC	Adv/Reimb.	135,000
6. COMMODITIES	"	"	45,000
7. CONSTRUCTION (DESIGN)	"	"	125,000
8. CONTINGENCY	"	"	43,000
9. EXECUTIVE DEVELOPMENT	"	"	65,000
10. EVALUATION/AUDIT	AID Direct	Direct Paymt.	55,000
11. USAID PROGRAM SUPPORT	AID Direct	Direct Paymt.	105,000
		TOTAL	1,400,000

NOTE: This total expenditure of US\$1,400,000 includes \$200,000 obligated under Amendment 10 of the existing Phase II Grant Agreement.

**(8) Procurement Procedures**

Under the Project, all technical assistance and commodities are expected to be either local or U.S. source/origin. Commodity procurement will include computer hardware and software, audio visual and teaching equipment, library acquisitions and other miscellaneous supplies and equipment.

Also there will be need to contract for architectural and engineering services for the design of a proposed new building to serve future management education needs. These procurement actions will be accomplished through host country contracts unless otherwise agreed. UWI has substantial experience with USAID procurement under Phases I and II; however, it will be necessary for USAID to review the IOB's procurement procedures, given its new status. This review will be done as a Condition Precedent to commitment of funds for new purchases under Element 3 and Element 6 of the project budget. Short term technical assistance will be sought from U.S. sources and arranged through host country contracting, as has been the practice to date.

**(9) Gray Amendment Provisions**

It is expected that UWI will make every effort to identify qualified Gray Amendment firms for procurement actions.

**B. Role of Other Donors and Overseas Academic Institutions**

**Linkages with other Donors** - AID has been the primary donor supporting the development of management education at UWI. However, all donors have identified the scarcity of qualified managerial talent as a major constraint to Jamaica's further economic development and participation in global growth.

The IOB is actively pursuing collaboration with other donors. The Commonwealth Secretariat has recently committed funds to the development of a new Masters Degree in Public Sector Management. That funding will cover major program development costs, as well as support for a selected group of students from throughout the Caribbean area. The program will enroll its first class in the fall of 1994. Universities collaborating in program development include Monash in Australia, The London School of Economics and Aston in Birmingham, England. The Inter-American Development Association has recently financed a research program and discussions are underway with the Educational Development Institute of the World Bank.

While strong collaboration between project activities and new initiatives of other donors will be actively pursued, USAID financing will go only to those activities targeted herein.

**Linkages with Overseas Academic Institutions** - The IOB's International Relations Committee, established as the primary means of fostering and maintaining strong professional ties with reputable overseas schools of management, is fully functional. One meeting, involving the participation of deans from leading schools in the U.S., Canada and Europe, has been successfully held, and a third is scheduled for 1994.

Strong institutional and individual linkages have been forged with the Business Administration School at the University of Florida, the Kellogg Graduate School of Management at Northwestern University, the Public Sector Management Institute at Monash University, The Graduate Management School at the University of Minnesota and the Management School of Durham University in England. These linkages are critical to the on-going process of peer review and curriculum updating. They have also led to significant contributions, especially in staff development; exemplary is the recent granting of full program tuition waivers for two faculty members doing Masters degrees at the Kellogg School.

## VIII. REVISED MONITORING AND EVALUATION

Monitoring of the Project will continue to be carried out both by USAID/Jamaica and UWI in order to (a) determine if the inputs are being provided in a timely fashion, (b) determine the extent to which planned outputs are being achieved, and (c) take timely corrective action when necessary.

While monitoring of Project implementation by UWI will continue to be carried out by a Project Management Team, policy guidance and strategic direction will be determined by the new IOB Board.

The Project Management Team will consist of persons occupying the following positions:

1. Principal or his nominee
2. Director of IOB (Project Manager)
3. Head of the DOMS
4. Dean of the FSS

This team should meet about once a month, with participation of the AID Project Officer as appropriate, to monitor the achievement of Project objectives and provide on-going supervision of the Project.

The daily operations of the project are monitored by the Project Manager/IOB Director who reports to the Principal or his designee. The Project Manager also liaises with leaders of the business community, leaders of other management training institutions in Jamaica and abroad and with management training faculty members from other UWI campuses.

Within USAID, responsibility for Project monitoring will be in the Office of Education and Human Resources (OEHR). OEHR staff will be assisted by the Office of Program and Project Development, especially on issues of implementation and evaluation, the Controller's Office on financial matters.

A two-phase project evaluation will take place following the first full year of implementation under this Supplement.

The first phase should occur no later than December, 1994. The purposes at this stage of the evaluation will be to determine:

1. The extent to which the commitments given by the UWI as conditions on which the Supplement was authorized, have been met.
2. If the projected private sector support has been forthcoming.
3. The extent to which the Project's objectives are being achieved.
4. If progress is being made toward achieving sustainability.

The second phase of the evaluation should take place between four and six months later as a follow-up, to determine:

1. if implementation adjustments suggested by evaluators are being carried out in a timely fashion;
2. the extent to which the Project is having the desired impact on the planned target groups; and
3. if Project EOPS are likely to be achieved.

The second phase of the evaluation should be done by the team assembled for the first phase. These external evaluators will be funded by the Project. The data collection and review of reports will be done in collaboration with USAID, the Institute of Business, the Faculty of Social Sciences and the Project Management Team.

## IX. ANALYSES - SUMMARIES

### A. TECHNICAL ANALYSIS SUMMARY

During this project supplement period, technical input will not change in nature, except for the work to design and set up an endowment program. It will, however, become focused in a more limited number of areas and will decrease incrementally over these final two years of the project.

The use of outside professors in the EMBA program has been significantly reduced during Phase II of the Project. When the EMBA was initiated, nearly 80% of teaching was done by American faculty. Today this has been reduced to about 30% with an objective of a further reduction to about 20%. The University anticipates maintaining the 20% level of external input in order to assure a broad, state-of-the-art perspective in the program. The full-time MBA that is to be designed will be based on the same philosophy. With the staff development that has been achieved under the project, external faculty assistance can be limited to a few areas where there are still gaps in the University structure. This involves the less quantitative areas of management.

At the undergraduate level project input will be focussed on curriculum review and revision in such a way as to contribute to the broader on-going faculty review process of the University. The Executive Development Program will benefit from assistance in developing quality marketing strategies, as well as some additional design assistance.

A cross-cutting critical activity for the IOB will be the development of an endowment fund that will give permanence and stability to the overall management education program. Technical assistance for this effort will be carefully selected, based on experience in the successful design and operation of University endowment programs that are financed by the private sector.

## B. ECONOMIC ANALYSIS SUMMARY

The economic analysis conducted for the original Project Paper (PP) showed that the economic return for both the undergraduate and graduate programs is relatively high in the Jamaican context. Given the fact that trained middle and upper managers are scarce and in great demand, there is a high multiplier for training in this area. Prior to the next evaluation of the project, provided for herein, the IOB will conduct an indepth impact study of program graduates to date. This will focus not only on identification of where graduates are but will use proxys to examine real benefits and economic gains of firms whose managers have participated in programs financed by the project.

## C. SOCIAL SOUNDNESS ANALYSIS SUMMARY

The original PP analysis emphasized that the capability, motivation and commitment of the staff of DOMS and other departments in the Faculty of Social Sciences, and the Institute are key determinants of the successful achievement of the Project's objectives.

The business and public sectors are being supplied with increasing numbers of qualified staff, particularly at the middle and senior management levels, thereby strengthening the nation's management capabilities. The spread effects and benefits being experienced among the different target groups are as follows:

- a. an increasing number of firms (approximately 100), and to a lesser extent public entities, are being better managed by graduates of the degree and non-degree programs;
- b. immediate benefits of the Project's staff development effort are accruing to the IOB, DOMS and university staff, and longer term benefits to the students, in terms of a broader and better taught curriculum;
- c. other management training institutions, (IMP and JIM, among others) will benefit from the academic recognition that will accrue to their programs under the proposed Certification and Accreditation program; and
- d. a broad range of private sector firms is recognizing that the UWI management education programs are in their self-interest, and, consequently, these firms are providing strong financial support and guidance through the IOB Board.

Overall, management education has become the fastest growing academic endeavor at the University. This growth has been accompanied by improved access. It is projected that, by the year 2000, at least 60 percent of the students in the undergraduate programs of the Faculty of Social Science will be women.

#### D. ADMINISTRATIVE ANALYSIS

The administrative analysis in the original Project Paper has now been modified to reflect administrative evolution and growth in three key areas.

Firstly, the IOB has taken on the structural characteristics of a profit/cost center affiliated to the University. Accountability is, as a consequence, more clearly defined and easily measured through the office of IOB's Director. Contribution to revenue and cost will be more transparent with the accounting procedures recently created by the IOB. The board of the IOB will be evaluated by the University administration on the same basis as that of a board of directors of a public corporation. Decision making responsibilities are clearly defined in this new structure and thus more easily evaluated. Administrative and academic autonomy are embedded in the new structure for IOB, but so too are all the facets of accountability associated with its activities and its governance.

Secondly, autonomy and accountability through affiliation are the twin principles of administration within IOB and with IOB's relationship to the University. The IOB is being structured around its own revenue/cost centers. This is not yet fully developed but the major activities will become the new managerial centers. Graduate programs, research, consulting, etc., are the centers where costs, revenues, accountability and quality can be easily identified.

Thirdly, the IOB is both autonomous and interdependent within the broader academic community of UWI. Herein lies the challenge of leadership for this new administrative structure. The IOB must review the way in which it delivers professional, research and administrative services. And it is within this context that the joint appointments of faculty become a cornerstone of the new structure. IOB will succeed if it facilitates collegiality and brings together all the relevant elements/departments of the University in all of its programs. In this regard, USAID's contribution of professional development funds for faculty members who participate in IOB's programs is essential.

These administrative adjustments are designed to address the issue of sustainability. IOB's success depends on its ability to effectively and efficiently manage transparency, accountability and collegiality.

## E. ENVIRONMENTAL ANALYSIS SUMMARY

An Initial Environmental Examination was carried out at the PID and the first amendment to Phase II stages, and a Negative Determination was made. None of the revisions to the project at this time are of a nature that would change that determination.

## **X. STATUS OF NEGOTIATIONS AND PROPOSED CONDITIONS AND COVENANTS**

A. Status of Negotiations - This supplement has been developed in collaboration with the UWI. UWI has provided USAID a request for assistance and the GOJ(PIOJ) has also separately forwarded a request in confirmation (Appendix 5).

B. Proposed Conditions and Covenants - The following conditions and covenants are proposed for inclusion in substance in the Project Agreement.

### Conditions:

-Prior to the commitment or disbursement of funds for procurement of any materials or equipment for the IOB, the Grantee will submit in form and substance satisfactory to USAID a procurement plan showing the procurement arrangements, and arrangements for controlling and managing the commodities once they are received by the IOB.

### Covenants:

-The Grantee covenants to submit to USAID by December 1994 an update of the current five-year Strategic Plan which addresses both qualitative and financial sustainability of the program beyond the life of the Project.

-The Grantee covenants to assure that an annual audit of project funds administered by the UWI is conducted.

-The grantee covenants to mobilize business sector support and secure commitment of resources adequate to proceed with contracting for construction of the new building by January 1995.

-The grantee covenants to complete, by September 1994, three senior faculty appointments required for advanced courses and to balance the teaching load in the DOMS; such appointments to be joint between the IOB and appropriate faculties of the University and to be the first of a planned nine joint appointments, including those of returning Ph.Ds trained under the project.

-The grantee covenants to finance operational deficits not covered by endowment/private sector support.

**XI. ANNEXES:**

1. UWI Financial Plan (1993 - 96)
2. Implementation Plan
3. Logical Framework
4. IOB Organizational Chart
5. Phase I Accomplishments and Evaluation findings
6. UWI and PIOJ request for assistance.

## SUMMARY : FINANCIAL PLAN (1993/94 - 1995/96)

	1992/93	1993/94	1994/95	1995/96	REMARKS
	Aug 92 Jul 93	Aug 93 Jul 94	Aug 94 Jul 95		
<b>INCOME</b>					
1. EMBA	5,225,000	7,950,000	12,700,000	17,200,000	
2. MPSM					
Income from fees	0	0	4,317,938	5,200,000	
Com. Sec. contribution	485,486	551,850	551,850		
3. Advanced Mgmt. Sem. Fees	1,121,707	1,875,000	2,250,000	2,450,000	
4. Other Seminars		1,562,500	1,875,000	3,600,000	
5. Consultancy Skills Sem.		120,000	0	0	
6. Entrepreneurial Mgt. Dev.	843,750	1,000,000	0	0	
7. Consultancy Research Proj		2,000,000	3,000,000	5,000,000	
8. Contract Research Projects		1,000,000	2,000,000	4,000,000	
9. MBA (Full-time)				4,000,000	
<b>Total Income</b>	<b>7,675,843</b>	<b>16,059,350</b>	<b>26,694,788</b>	<b>41,450,000</b>	
<b>EXPENDITURE</b>					
1. EMBA				9,217,128	
a) Lecturers (Overseas)	1,993,362	3,247,200	3,896,640		
b) (UWI)	347,365	1,790,000	2,685,000		
c. Other Costs	5,812,945	580,862	1,899,807		
Sub-total	8,153,672	5,618,062	8,481,447	9,217,128	
2. MPSM:				2,339,663	
a) Lecturers			2,129,377		
b) Program Dev.	485,486	528,997			
c) Other Costs					
Sub-total	485,486	528,997	2,129,377	2,339,663	0
3. Advanced Executive Mgmt.	1,156,117	2,237,044	2,725,253	2,046,000	
4. Other Seminars		1,356,039	1,627,247	2,600,000	
5. Consultancy Skills Workshop		373,500	0	0	
6. Entrep. Mgt. Development	843,750	980,000	0	0	
7. Consultancy Projects		802,000	1,802,000	3,802,000	
8. Contract Research Projects		754,717	1,500,000	3,500,000	
9. MBA (Full-time)				4,000,000	
10. Joint Appointments		1,000,000	3,000,000	4,000,000	
<b>Total Expenditure</b>	<b>10,639,025</b>	<b>13,650,359</b>	<b>21,265,324</b>	<b>31,604,791</b>	
<b>SUMMARY</b>					
Programme Income	7,675,943	16,059,350	26,694,788	41,450,000	
Programme Expenditure	10,639,025	13,650,359	21,265,324	31,504,791	
Program Surplus/(Deficit)	(2,963,082)	2,408,991	5,429,464	9,945,209	
Personnel		12,999,000	12,738,000	13,374,900	
Operations		1,971,000	2,365,200	2,483,460	
USAID Contribution		12,090,000	7,110,000	900,000	
Surplus/(Deficit)		(471,009)	(2,563,736)	(5,013,151)	

Implementation Plan

	Respon- sibility	93/94	94/95	95/96
<u>Institute of Business Program &amp; Activities</u>				
<u>Master of Business Administration</u>				
- 45 EMBA enrolled each year	IOB/FSS	Apr. 94	Apr. 95	Apr. 96
- 30 Full-time MBA enrolled each year	-do-	-	May 95	May 96
- Full-time MBA curriculum design & EMBA redesign	-do-	May 94	-	-
- EMBA curriculum redesigned	IOB	Dec 94		
<u>Executive Program</u>				
- Marketing Plan	IOB	May 94		
- MMDP Programme Design		Oct. 94	-	-
- 20 MMDP enrolled each year	IOB	-	Mar. 95	Mar. 96
- 25 EMDP enrolled each year	IOB	May 94	May 95	May 96
- 20 IEMDP enrolled each/yr	IOB	Aug. 94	Aug. 95	Aug. 96
- 15 enrolled in 1-day seminar each/yr	IOB	Aug. 94	Aug. 95	Aug. 96
<u>IOB Consultancy/Research</u>				
- 4 Consulting projects under contract, two each year	IOB	Sep. 94	Mar. 95	-
- 4 Research projects under contract, two each year	IOB	Sep. 94	Mar. 95	
- 5 projects in process each year	IOB	Jun. 94	Mar. 95	-
<u>Administration</u>				
- 3 new Core Staff on Board	UWI/IOB	Jan. 94	-	-
<u>Physical Facilities</u>				
- Design for new building completed	UWI	Aug. 94		

	Respon- sibility	93/94	94/95	95/96
<u>Computer/Teaching Facilities</u>				
- Computer Hdw upgraded	IOB	Dec. 94	Jul. 95	
- Computer software	IOB			
- Library upgraded	IOB			
<u>DOMS &amp; Faculty of Social Sciences</u>				
- Undergraduate Management and Public Administration BSc. degree redesigned	DOMS/FSS	Jun. 94	-	-
- Faculty Awards, 5 in 1994 5 in 1995	DOMS/FSS	Mar. 94	Mar. 95	-
- Undergraduate BSc. refined	DOMS/FSS	-	Jun. 95	-
<u>Staff Development</u>				
- 3 Joint PhDs awards	UWI	Jun. 94		
- 3 MS. awarded	DOMS/FSS	Mar. 94	-	-
- Training plan completed	DOMS/IOB	May 94		-
<u>Endowment Program</u>				
- Endowment Plan	UWI	Dec. 94		
<u>Covenants</u>				
- Strategic Plan submitted to USAID	IOB/UWI	Dec. 94		
- Annual audit of Project funds conducted	IOB	Dec. 94		
- Business sector support mobilized	UWI		Jan. 95	
- 3 Senior faculty appointment effected	UWI	Jun. 94		
<u>Condition Precedent</u>				
- Procurement plan completed	IOB	May 94		

Project Design Summary:LOGICAL FRAMEWORK MATRIX

NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
I. <u>GOAL</u>			
To overcome shortage of trained managers at mid and upper management level in Jamaica.	- Increased number of UWI graduates employed as mid- and upper level managers	Proj. Eval. PIOJ Reports, statistical Institute publication, UWI, DOMS, IOB reports.	Increased demand for mid and upper managers
II. <u>PURPOSE</u>			
To consolidate achievements and advance sustainable development of mgt. education and trng. at the UWI.	<ul style="list-style-type: none"> <li>- Demand driven program that responds to market needs.</li> <li>- Graduates in high demand</li> <li>- Dependable income streams derived primarily from program clientele.</li> </ul>	<ul style="list-style-type: none"> <li>- Board Records UWI/IOB files</li> <li>- Impact study report alumni association records, follow-up studies.</li> <li>- Records of financial support and sponsored tuition by clientele.</li> </ul>	UWI implements plans for sustainability of management education and training.

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NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
<b>III. <u>OUTPUTS:</u></b>			
<b>1. <u>PROGRAM DEVELOPMENT</u></b>			
a) Executive Masters in Business Administration (EMBA)	<ul style="list-style-type: none"> <li>- 45 students enrolled/year.</li> <li>- 145 graduates by 1995.</li> <li>- Curriculum globalized/upgraded</li> <li>- Electives increased through linkages with other departments</li> <li>- Relevant case materials developed</li> </ul>	<ul style="list-style-type: none"> <li>Registered records</li> <li>" "</li> <li>Faculty review</li> <li>UWI/DOMs files</li> <li>Teaching syllabus</li> </ul>	Sufficient number of students applying for programs
b) Masters in Business Administration MBA	<ul style="list-style-type: none"> <li>- Curriculum developed including 4 new electives</li> <li>- 30 students in training</li> </ul>	<ul style="list-style-type: none"> <li>Project reports, and</li> <li>Evaluation reports</li> </ul>	Demand for these courses by the business sector continues
c) Executive Management Development Seminar (EMDP) (Credit course)	<ul style="list-style-type: none"> <li>- 50 graduates (2 years)</li> </ul>	"	"
d) Undergraduate Management Program	<ul style="list-style-type: none"> <li>- Faculty review completed.</li> <li>- Curriculum redesigned/upgraded to include electives from the Social Sciences and Language departments</li> <li>- Joint appoint mechanism utilized.</li> </ul>	"	

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NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
e) Executive Development Programs: IEMDP Exec. Seminars (1 day)	<ul style="list-style-type: none"> <li>- Marketing Strategy Plan (2-yr)</li> <li>- 40 graduates (20/yr)</li> <li>- 30 participants</li> </ul>	IOB Plan IOB files "	Demand for these courses by Business sector
<b>2. STAFF DEVELOPMENT</b>			
Upgrading teaching and research skills of DOMS Faculty	<ul style="list-style-type: none"> <li>- 5 Ph.D students trained</li> <li>- 7 new staff with MSc degrees</li> <li>- 3 students completed one year U.S. portion of joint UWI/Florida PhD program</li> </ul>	DOMS/IOB reports/files	UWI will identify and select staff for training consistent with Project Implementation plan
<b>3. NEW ORGANIZATIONAL/ FINANCIAL STRUCTURE</b>			
	<ul style="list-style-type: none"> <li>- IOB as Company Ltd</li> <li>- IOB corporate structure fully operational</li> <li>- IOB operational costs covered</li> <li>- <u>Endowment</u>: (a) mechanism fully institutionalized; (b) initial permanent capital funds generated</li> </ul>	IOB reports IOB reports Evaluation report UWI report	UWI supports IOB's autonomy  strong linkage between alumni and business community

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NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
4. <u>SPONSORED RESEARCH</u>	<ul style="list-style-type: none"> <li>- 4 projects completed, 2 annually</li> <li>- 5 projects completed</li> <li>- 10 development professional cases completed for teaching purposes</li> </ul>	DOMS/proj. reports  Reports	Sufficient number of private sector/ public sector institutions needing consultancy and research projects
5. <u>COMPUTER FACILITIES</u>	- Software & Hardware upgraded	Site visits Evaluation Report	
6. <u>LIBRARY</u>	- Library services upgraded	"	
7. <u>ARCHITECTURE AND ENGINEERING</u>	- Architectural and Engineering designed completed	Site visits Design examined	
8. <u>DIVESTITURE OF CERT. PROGRAMS</u>	- All cert. programs divested to other management training institutions.	UWI/DOMS reports	Certificate programs not cost effective to UWI

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NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
IV. <u>INPUTS:</u>			Inputs from USAID & UWI on timely basis
1. <u>Technical Assistance</u>			
- Resident Management Fellow	- Contractor services	Contractor reports, IOB reports	
- EMBA lectureship - MBA design	- Contractor services	Site visit, curriculum examined	
- EMDP expanded	"	Brochures examined	
- IEMDP " "	"	"	
Upgraded BsC	- Upgraded curriculum	Curriculum examined Site visit	
Architectural + Engineering Design	- Services provided	Design examined proj. report.	
2. <u>Program Development</u>			
- Research Grant	Services provided	Contractor reports, curriculum examined, IOB reports	
- Upgrading undergraduate program	" "		
- Certification divested	" "		

NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
<b>3. Administrative Support</b>			
<ul style="list-style-type: none"> <li>- Director IOB</li> <li>- Fellow/Coordinator of Masters program</li> <li>- Research fellow</li> <li>- Consultancy fellow</li> <li>- Accountant</li> </ul>	Services provided " " "	Proj. report Site visit IOB Reports IOB Reports IOB Reports	
<b>4. Training</b>			
Off Shore Training	5 trained at Ph.D level  7 trained at Ms.c level	PIO/Ps Returnee interviews " "	

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NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS
5. <u>Commodities</u>	<ul style="list-style-type: none"> <li>- Computer Hardware + Software</li> <li>- Library Materials in use</li> </ul>	PIO/Cs Site in- spection	
6. <u>Endowment Fund</u>	- Fund Established	UWI/DOMS/ Report IOB	

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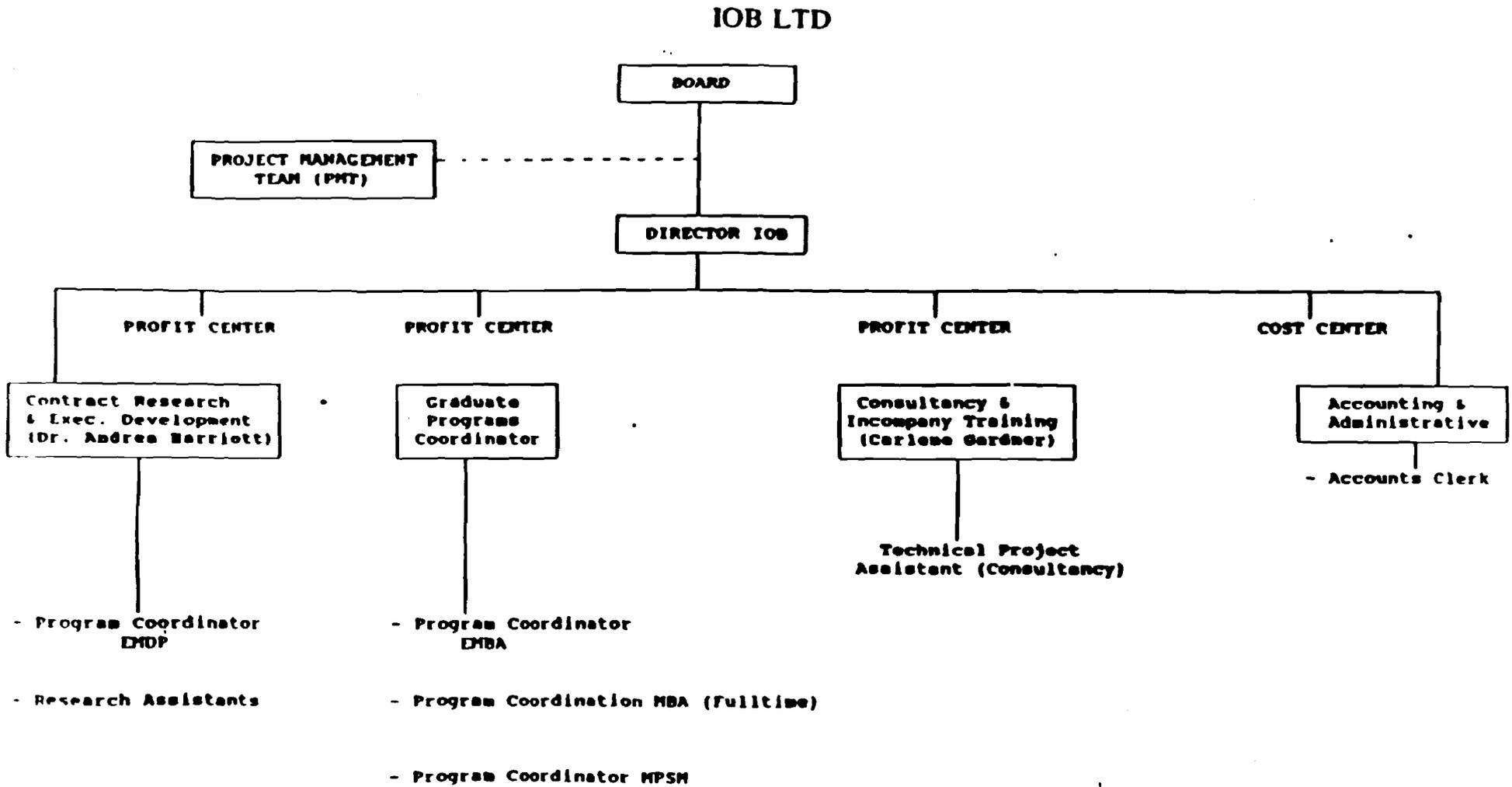
## UWI Phase II Logical Framework

INPUTS	USAID	UWI	TOTAL
<u>Element</u>			
1. Technical Assistance	365,000	190,000	555,000
2. Administrative Cost	177,000	201,000	378,000
3. Computers Hardware and Software	85,000	5,000	90,000
4. Staff Development	200,000	85,000	285,000
5. Program Development	135,000	100,000	235,000
6. Commodities (Library & AV Equipment)	45,000	15,000	60,000
7. Construction A&E Design	125,000	-0-	125,000
8. Contingency	43,000	-0-	43,000
9. Executive Development	65,000	35,000	100,000
10. Evaluation and Audit	55,000	5,000	60,000
11. USAID Program Support	105,000	-0-	105,000
<b>TOTALS</b>	<b>1,400,000</b>	<b>636,000</b>	<b>2,036,000</b>
<b>% Contribution</b>	<b>69%</b>	<b>31%</b>	

Note: This USAID contribution of US\$1,400,000 includes US\$200,000 obligated under Grant Agreement Amendment No. 10 signed December 14, 1993, previously authorised under Phase II.

FIGURE 1: ORGANIZATIONAL STRUCTURE OF THE IOB

ANNEX IV



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PHASE I

Phase I provided US\$2,450,000 directly to the UWI to finance the following four major components during the period FY 1987 - 1990:

(1) Staff development - entailed upgrading the capabilities of the Department of Management Studies (DOMS) staff to better deliver management education programs. Under this activity young recruits were sent to U.S. universities for MS level training, with specializations in disciplines which address the needs of the Jamaican business community, for example, Banking and Finance, Marketing, Operations/Production Management, Human Resources Development, and Management Information Systems;

(2) Program development - established new and improved courses at the B.Sc. level, including semesterization of the entire DOMS curriculum to meet the new semester system for the entire University, and also, the introduction of the Executive MBA program and a series of Executive Management Development programs;

(3) New Organizational Structures - included the introduction of new organizational structures, such as, new Units in the DOMS (MIS & Accounting, Business Economics, Marketing, General Management & Human Resources, Operations and Management, and Business Law) and the groundwork for the establishment of an Institute of Business;

(4) Physical facilities: The project provided US\$360,000 which funded the construction of a new extension to the existing building housing the Department of Management Studies.

**PHASE I - Accomplishments:**

Phase I had several significant accomplishments, most notably the creation of new institutional structures to allow the University to create fee-based programs. In some activities progress exceeded planned expectations. The Project resulted in the following important achievements:

(1) A graduate program in management, the two year Executive Master of Business Administration (EMBA). The initial enrolment in the program was 30 per annum and the first 29 students graduated in November 1991;

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(2) A series of five short-term Executive seminars which catered for an average of 25 participants per offering. Both of these, (1) and (2), executive management development initiatives enabled UWI to respond to the needs of the private sector for advanced management education and training.

(3) Modification to the undergraduate program in Management Studies and Public Administration which provided for semesterization, and the introduction of new electives.

(4) Establishment of the institutional framework for the introduction of the Institute of Business (IOB) which was introduced to facilitate institutional sustainability.

(5) The training of nine (9) new staff members to the Masters level specializing in the functional areas of management who returned as full time junior lecturers to the Department of Management Studies. This initiative significantly strengthened the teaching capabilities of the undergraduate programs in management. Additionally, there has been the training of several lecturers in the Faculty via short term assignments and through local seminars.

(6) The development of nine local business cases. The development of these cases enhanced the collaboration between the Faculty of Social Sciences and the business community and in addition the cases served to improve the instructional material and methodology of the courses.

(7) The acquisition of 28 micro processors (computers) and related peripherals, software packages and furniture served to provide for the introduction of computer training to students in the Faculty of Social Sciences.

(8) The extension to the building which houses the Department of Management Studies by 4000 sq. ft. This extension provided for expanded physical facilities to accommodate a Computer Training Laboratory with 28 work stations, two large lecture rooms, and additional rooms for the nine new staff members as well as open-door reading areas.

## **PHASE II (1990 - 1995)**

Phase II was approved to build on and consolidate the programs and initiatives started under Phase I. In particular, it includes three of the four components of Phase I: (1) staff development; (2) introduction of new organizational structures; and (3) program development. All project activities except training were expected to be completed within the first three years, i.e., by September 1993. The final two years are for completion of Ph.D. training for UWI faculty. Key to USAID's consideration and approval of Phase II was the need for a strategy to move the project toward financial sustainability.

### **A. Objectives of Phase II**

- (i) To develop a long-term strategy to achieve financial sustainability through the IOB programs; and
- (ii) To increase foreign exchange earnings and employment. (USAID's strategic objective No.1 in its country strategy.)

### **B. Accomplishments of Phase II Objectives**

#### **EVALUATION FINDINGS**

In a mid-term evaluation completed in April 1993, the evaluator concluded that the project was generally on target and that the accomplishments under both phases were substantial. The evaluation also considered the project's impact on USAID's strategic objective No. 1, to increase foreign exchange earnings and employment. The evaluation found that the main contribution of the Project to foreign exchange earnings was through its development of a pool of Jamaican managers. It also contributed to foreign exchange savings since it allowed an increasing number of students to receive management education in Jamaica. In order to consolidate what has already been achieved to date, the evaluation recommended that the project should give consideration to the following:

- a. The IOB needs to achieve a greater autonomy within the university. Long-term sustainability of the IOB depends on its obtaining status within the University which will streamline the decision-making process and allow for more effective and efficient allocation of staff.
- b. There was need to encourage rapid development of executive seminars and short courses since these would contribute to financial sustainability.
- c. The university needed to reevaluate business consultancy

vis a vis contract research. The UWI had more comparative advantage by undertaking research work for the private sector.

- d. There was need to pay attention to articulation with other management education and certificate granting institutions in Jamaica and throughout the West Indies.
- e. The EMBA and executive seminars and short courses should include more participants from the public sector.
- f. The DOMS and IOB should benefit from the current capital development campaign.
- g. Resources must be identified and secured before any further expansion of graduate education or IOB programs are undertaken.

These recommendations notwithstanding, the evaluator documented a number of positive impacts. The project has been an important component of the changing focus of the Jamaican business community. Participants in the programs are quite vocal in their support for an export orientation and government/business cooperation in export development.

The Project enabled the Faculty and the University to provide significant expansion in the number of graduates particularly at the bachelors and the masters level. Graduates in the management/public administration areas now account for 90 percent of the output of the Faculty. The activities of the Faculty, however, are still heavily centered at the undergraduate, certificate and diploma levels. Only 10 percent of the faculty's output is at the post graduate level. The annual output of masters degree increased from 27 in 1981/82 to 62 in 1991/92.

Over the seven-year period 1981/82 to 1988/89 the total number of students graduating from the undergraduate, certificate and post graduate programs increased from 362 to 442, an overall increase of 22.6%. Over the three-year period 1988/89 to 1991/92 the output increased from 442 to 646 an increase of 46.2%. In this same period students graduating in the field of business and public administration (Management) increased from 352 to 539 an increase of 53.1 percent.

The major investment in staff development (approximately US\$1m) strengthened the quality of the programs and improved the image of the University to the business sectors. In conjunction with this, the University has accepted the principle of joint appointments and visiting appointments to further strengthen academic resources for various programs. The new faculty funded by USAID have contributed greatly to the teaching of undergraduates in particular, allowing the number of undergraduates to increase substantially as planned.

One of the most significant effects of the project has been to help the University forge greater links with the private sector. One business leader characterized the change in the University that has occurred under the leadership of Vice-Chancellor McIntyre as a revolution.

The business sectors are being supplied with increasing numbers of qualified staff at the supervisory level, the entry levels to management and to middle and senior management levels, thereby strengthening the nation's management capabilities to compete in the global economy. The private sector in particular is satisfied with the improvement in the quality of the graduates, and with the relevance of the new direction for management studies at the UWI.

#### Other Recommendations for Phase II Amendment

In a follow-on consultancy for project design, the design consultant recommended that the amendment focus on two other areas to help assure sustainability: research and consultancy. He concluded that notwithstanding the fact that the consulting and research component was the most underdeveloped component of the project, this, if properly organized, offered tremendous potential for long term sustainability. Among the main reasons advanced for research work were: (1) for a university to gain prestige as a research and teaching institution, it must promote full-time graduate programs providing for research linkages between students reading for their masters or Ph.D. and their professors; (2) it provides opportunity for intellectual and professional development of faculty staff; and (3) in the case of the IOB, it will contribute to departmental recognition. The IOB should engage in research projects that are heavily weighted toward resolving strategic issues of firms, either public or private. This focus on strategic management should provide the best mechanism of linking DOMS with IOB. Grants should be made available to faculty members for research and case writing.

In the case for Consultancy, the University would have to be committed to resolve a number of organizational problems. Foremost is the problem of the development of an institutionalized consultancy operation by IOB within the traditional systems of the UWI. This centers around problems of control, commitment and focus. However, the problems do not negate the potential opportunities for consultancy at UWI. The IOB must define a niche of the market for concentration, so as not to conflict with nor duplicate present areas of dominance by ISER.

While recommending expansion of the research and consultancy component, the design consultant strongly recommended that the leadership of this area of activity be improved.



FILE

ANNEX VI

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021172

# THE UNIVERSITY OF THE WEST INDIES

SENATE HOUSE, KINGSTON 7, JAMAICA

Tel: 927-2781, 927-1660-9. Cable: UNVERS. Telex: 2123. Fax: 927-2156

From: Pro-Vice-Chancellor G.C. Lalor, OJ, CD, MSc, PhD  
PRINCIPAL

July 23, 1993

Mr Robert Queener  
Chief of Mission  
US Agency for International Development  
6b Oxford Road  
KINGSTON 5

Dear Mr Queener:

Following from my letter of June 3, 1993 to Mr Jerry Wood, and our recent meeting in my office, the University is now requesting a further grant for the period 1993/95, to consist of US\$1.425 million inclusive of US\$200,000 unobligated from Phase II.

This grant is to form Phase III of the UWI/USAID Management Education Project.

Your kind cooperation in the above regard would be appreciated.

Yours sincerely,

*Gerald Lalor*  
Gerald Lalor  
PRINCIPAL

CS/led

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DATE BY	8/5

Handwritten notes: 4/23, 8/5, 8/3

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# THE PLANNING INSTITUTE OF JAMAICA



#021325  
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Telephone: 926-1480-8  
Telex: 3529 PLAN JAM JA  
Facsimile: (809) 926-4670

ANY REPLY OR SUBSEQUENT REFERENCE  
TO THIS COMMUNICATION SHOULD BE  
ADDRESSED TO THE DIRECTOR GENERAL  
PO BOX 634, KINGSTON

39-43 Barbados Avenue  
Kingston 5 Jamaica W.I.

Ref. No.

September 7, 1993

Mr. Robert Queener  
Director  
United States Agency for  
International Development  
6B Oxford Road  
KINGSTON 5

Dear Mr. Queener:

**Re: Amendment to UWI Management Education Project**

This letter constitutes a formal request from the Government of Jamaica to the United States Agency for International Development for a grant of One Million, Two Hundred and Fifty Thousand United States Dollars (US\$1,250,000.00) to provide additional assistance under the University of the West Indies Management Education Project.

We understands that the amended project will continue support for programme development and the training of staff until September 1995 when the assistance will be completed.

We look forward to your positive response and to working with you in implementing this important activity.

Sincerely,

Winston Anderson  
for Director General (Acting)

c.c. Professor Gerald Lalor  
Principal, UWI

RECEIVED	ACTION OFFICE: OEHB		INFO TO:	ARDO	OHNP	OEHR	OPPD	OPE	RHUDO	R.F.	DUE BY: 9/21	ACTION: NAN
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9/15/93

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